

## APPENDIX 3 – Workshop Results & Pre-feasibility Assessments

### Golden Product Ideas

#### Snowmobiling

##### Product Ideas:

- Destination snowmobile lodge with access to remote backcountry areas
- A snowmobile trail grooming and maintenance business (including sign and trail map maintenance)
- Remote trail fuelling stations with temporary shelters that can provide hot food service, portable washroom facilities)
- Snowmobile terrain complex

## Snowmobiling

### Product Description:

Snowmobile terrain Complex (location for related special events)

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• West Bench as a possible location</li> <li>• A site should be 5 – 10 minutes from town</li> <li>• Site must have a variety of terrain (ups, downs, flats)</li> </ul>	<ul style="list-style-type: none"> <li>• Typically would have a club to run it but could be a business</li> <li>• On site would need to have concession, washroom facilities, storage, parking, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Would attract a cross section of users</li> <li>• Market could draw from a 500 mile radius</li> <li>• Facility could run also seasons (in summer with ATVs, motor cross, etc)</li> </ul>	<ul style="list-style-type: none"> <li>• Necessary permits/licenses</li> <li>• Wildlife</li> <li>• Noise</li> <li>• Water</li> <li>• Pollution</li> <li>• Zoning</li> <li>• Liability insurance</li> <li>• Access</li> <li>• Conflicting use</li> </ul>

### Overall Potential – Good

- Snow conditions are favourable as are market conditions and participation rates.
- However, the growth potential is in snowmobile touring rather than play areas.

### Competition – High

- Broad choice of destinations are available across the province.
- Province-wide trail network will improve access to quality terrain in affected communities, but it will also increase participation.
- Revelstoke has established itself as a snowmobile destination and will be seen as a preferred locale for regional sledders.

### Business Development – Community cooperation

- As in Revelstoke, the cooperation of local snowmobilers is essential as it will be difficult to justify the investment in facilities on a strictly commercial basis. Any development in an area like the West Bench would automatically attract local users and may conflict with other possible uses (e.g. cross-country skiing).
- Developing trails in co-operation with off-season users such as hikers, mountain bikers and horseback riders is also possible.

### Keys to Success – Good equipment and access to quality terrain

- Ensuring trails are well-maintained by working with local snowmobile clubs and associations.
- Having access to high quality resources.
- Improving infrastructure and hospitality services to encourage longer and more frequent trips.
- Working with government and tourism agencies as well as environmental groups to develop and promote the trail systems.
- Developing a code of conduct for safety and environmental concerns which is strictly adhered to.

<p><b>Complementary Activities:</b>  Special events  Repair and maintenance services  Sales and rentals</p>
<p><b>Comments:</b>  This product would require an year round facility that could accommodate other sport activities that require a terrain complex (Mtn biking, dirt biking, motor cross).</p>

**Snowmobiling**

**Product Description:**  
Remote trail fuelling stations with temporary shelters that can provide hot food service, portable washroom facilities)

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>Possible sites are Quartz, Gorman, drainages for shorter routes</li> <li>Long distance service areas would be Bush River and Spillimacheen, Golden to Invermere</li> <li>Servicing sites would have to be no further than 100 km from parking lots</li> </ul>	<ul style="list-style-type: none"> <li>Groomed trails</li> <li>Snow cat to town portable fuelling equipment</li> <li>Portable shelters for provision of hot food</li> <li>Portable washroom facilities</li> </ul>	<ul style="list-style-type: none"> <li>Locals</li> <li>Any snowmobilers using area where service located</li> <li>Alberta/ Pacific NW</li> <li>Large emphasis on families</li> </ul>	<ul style="list-style-type: none"> <li>Environmental issues</li> <li>Permits/Licenses</li> <li>Pollution</li> <li>Solitude issues</li> </ul>

**Overall Potential – Good**

- Snow conditions are favourable as are market conditions and participation rates. New infrastructure that encourages longer stays, including potential overnight and multi-day trips will appeal to the touring market which is expanding in BC.

**Competition – High**

- Broad choice of destinations are available across the province.
- Province-wide trail network will improve access to quality terrain in affected communities, but it will also increase participation.

**Business Development – Community cooperation**

- Linkages to BCSF's community trail network would enhance potential.
- New tour development into the backcountry would have to take careful account of safety factors. As use increases there is increased danger related to natural occurrences such as avalanches.
- The potential for user conflicts with heli-skiers and backcountry skiers may also arise if use areas overlap.
- Some form of user fees may be required to offset the associated costs. This will present challenges in terms of fee collection for both self-guided users and, potentially, commercial operators.

**Keys to Success – Quality trails and infrastructure**

- Ensuring trails and facilities are well-maintained by working with local snowmobile clubs and associations.
- Improving infrastructure and hospitality services to encourage longer and more frequent trips.
- Working with government and tourism agencies as well as environmental groups to develop and promote the trail systems.
- Developing a code of conduct for safety and environmental concerns which is strictly adhered to.

**Complementary Activities:**

- Guided tours
- Training/orientation/education services
- Provide shuttle service for other activities (ski tourers, ice climbers)
- Access to summer backcountry activities such as mountain biking, hiking, ATV riders

**Comments:**

- This product would have to be coupled with a number of other services to enhance its economic viability.

## **Ski Touring**

### **Product Ideas:**

- Guiding ski touring services
- Providing access by snow machine to remote backcountry areas (shuttle service) for ski tourers
- Backcountry accommodations (hut to hut system, temporary structures)
- Development of guide book, guide/accommodation booking service

## Ski Touring

### Product Description:

Guiding ski touring services

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>▪ Use terrain in National Parks</li> <li>▪ Good variety of terrain (beginner to expert, treed to alpine)</li> <li>▪ Variety of access options (from roads, helicopter drop points)</li> <li>▪ Good snow pack conditions</li> <li>▪ Solitude – non-motorized areas</li> </ul>	<ul style="list-style-type: none"> <li>▪ Roded access</li> <li>▪ Backcountry huts and cabins</li> <li>▪ Front country food /accommodation services</li> </ul>	<ul style="list-style-type: none"> <li>▪ Beginner to experts</li> <li>▪ Canadian, USA and International clientele</li> <li>▪ Market demand is annually increasing</li> </ul>	<ul style="list-style-type: none"> <li>▪ Requirement for certified/licensed guides</li> <li>▪ Avalanche hazards</li> <li>▪ Wildlife conflicts</li> <li>▪ Conflicts with other users</li> <li>▪ Access to large areas of varied terrain</li> </ul>

### Overall Potential - Moderate

- Demand is low but growing for this product. As skiing technology improves and as lift-service options expand, ski touring will become even more accessible to a broader market.
- The Columbia Forest District is well known throughout the Pacific North West as having some of the best ski touring conditions and areas. Though the Golden area has several commercial backcountry ski lodges, there is still room for development in niche areas. The best potential for commercial development is in association with hut or lodge-based operations.
- Parks Canada has stated that there is potential for some immediate modest growth in the local, regional and international adventure recreation markets, principally among winter backcountry users. Mount Revelstoke and Glacier have focused promotional efforts on the parks' high quality winter backcountry recreation opportunities.

### Competition – High

- There are several areas in BC and Alberta with quality ski touring terrain.
- Infrastructure is well developed in Alberta Rockies.
- Commercial operators will be challenged to attract clientele, because the park system, local alpine clubs and societies provide access to over 40 public backcountry huts to ski tourers at little or no cost.

**Human Resources – Highly qualified guides.**

- Hiring qualified and certified guides and instructors is increasingly important as backcountry visitation increases and the risk to personal safety climbs. The vast majority of commercial ski tour operators use professionally certified adventure travel guides and/or tour leaders.

**Business Practices – Average revenue potential, low returns.**

- The average Canadian tour operator offering ski touring as the major activity had annual gross revenues of \$230,122 in 1993, with about 50% bringing in less than \$50,000 annually. The gross margins are not that attractive, averaging 4.2% due to higher-than-average operational expenses. The average number of skiers per operation was 572, trip length was between 4 and 4½ days, and per day revenues approximately \$100. This is believed to be a good representation of the BC sector as almost one half of all operators in the country are based in BC.
- Most operators offer a mix of day-trips and overnight trips with preset packages the norm.

**Business Development – Appeal to participants, beginners and niche markets**

- Telemark skiing will become increasingly popular as will the overall market for nordic skiing. This will create demand for good beginner instruction and also increase the importance of the accommodation and other facilities in attracting the broader market. Specific niche markets such as women-only clinics and tours have good potential for expansion.
- As user fees becomes more prevalent in backcountry areas, more operators may begin working with recreational skiers and clubs to maintain and enhance high quality areas.
- Providing courses packaged with rentals and guided tours will encourage beginners and casual participants to participate.

**Keys to Success – Quality terrain and equipment, remote but safe experiences**

- Good access to high quality terrain, including permits/tenure for secluded backcountry areas.
- For the destination-based traveller, high quality accommodation and support facilities. If specialized target markets are being attracted, then developing menu and accommodations have to be designed accordingly.
- High-quality, well-maintained equipment, with a variety of sizes suitable for the family market.
- Ability to answer questions from both beginners and experts on equipment and trails in the area.

**Complementary Activities:**

- Development of temporary or permanent backcountry accommodations (tents/yurts, huts/cabins/lodges)

**Comments:**

- There are currently a number of professional guides operating out of Golden who have guiding businesses.

## Ski Touring

### Product Description:

Development of a Hut to Hut system with temporary/portable structures

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Areas that are accessible without helicopters in the winter</li> <li>• Less technical/flatter terrain</li> <li>• Solitude / wilderness areas</li> <li>• Valley bottom to alpine areas</li> </ul>	<ul style="list-style-type: none"> <li>▪ Development of temporary / portable accommodation facilities</li> <li>▪ Low cost means of supplying and accessing facilities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Advanced beginners to advanced intermediates</li> <li>▪ North American wide market</li> </ul>	<ul style="list-style-type: none"> <li>▪ Conflicts between same and differing user groups</li> <li>▪ Environmental issues (water, human waste, wildlife)</li> <li>▪ Licenses, tenures</li> </ul>

### Overall Potential - Moderate

- Demand is low but growing for this product. As skiing technology improves and as lift-service options expand, ski touring will become even more accessible to a broader market.
- The Columbia Forest District is well known throughout the Pacific North West as having some of the best ski touring conditions and areas. Though the Golden area has several commercial backcountry ski lodges, there is still room for development in niche areas. The best potential for commercial development is in association with hut or lodge-based operations.
- Parks Canada has stated that there is potential for some immediate modest growth in the local, regional and international adventure recreation markets, principally among winter backcountry users. Mount Revelstoke and Glacier have focused promotional efforts on the parks' high quality winter backcountry recreation opportunities.

### Competition – High

- There are several areas in BC and Alberta with quality ski touring terrain and destination status, and numerous lodges targeting the destination-oriented ski tourist.
- Commercial operators will be challenged to attract clientele, because the park system, local alpine clubs and societies provide access to over 40 public backcountry huts to ski tourists at little or no cost.

### Human Resources – Highly qualified guides and hospitality personnel

- Hiring qualified and certified guides and instructors is increasingly important as backcountry visitation increases and the risk to personal safety climbs. The vast majority of commercial ski tour operators use professionally certified adventure travel guides and/or tour leaders.
- Huts will require additional personnel for maintenance and supply.

### **Business Practices – Average revenue potential, low returns**

- The average Canadian tour operator offering ski touring as the major activity had annual gross revenues of \$230,122 in 1993, with about 50% bringing in less than \$50,000 annually. The gross margins are not that attractive, averaging 4.2% due to higher-than-average operational expenses. The average number of skiers per operation was 572, trip length was between 4 and 4½ days, and per day revenues approximately \$100. The average ski tour operator does not generate enough revenue to justify lodge/resort investments.
- Huts will add to the capital cost of a ski touring operation and necessitate the development of all season products to justify the added investments and improve returns. For developments on Crown land, the form of tenure is an important consideration. Huts on Crown land outside of parks are often erected by recreation clubs who have been licensed for such development by the Ministry of Lands. There is no exclusivity of access to or within the huts to facilitate public access. Commercial use is considered unethical unless the operator reimburses for that use or otherwise contributes to maintenance and upkeep.
- There are few instances of hut development on Crown land by commercial operators because of problems associated with vandalism and unauthorized use by the public. As huts would be usually be constructed on an existing trail, access would be available to all trail users. Even if a private operator constructed new trails for a hut or hut system, BCAL is likely to authorize such development through a Licence of Occupation, which would still allow public use of the trails and access to the hut (although the hut itself could be locked). This lack of exclusivity is likely to deter future commercial hut development.

### **Business Development – Coordinated system and policies**

- As noted in the previous product idea, the expanding market for ski touring is attracting more soft adventurers to the sport and leading to more niche development. Services and products targeted at beginners, families, women and casual participants will enhance market potential.
- These markets are also looking for relatively good accommodation and food services compared to the hard adventurer who is just as likely to camp than stay in a hut or lodge.
- If a hut system is established, facility managers and users must establish clear guidelines for acceptable use and activities and the extent to which they can be done in the area supported by the huts. They must follow practices that minimize the impact on the environment.
- Capital costs can be kept low by choosing to provide minimal amenities that only need replenishment once in a while, or arrange for regular transport of supplies into the hut, either by motorized or non-motorized means.

### **Keys to Success – Quality ski terrain, quality accommodation**

- All the elements of high quality ski touring should be present, including access to high quality terrain, a secluded, wilderness experience and quality guiding.
- For hut systems, clearly identifying the purpose and role of the hut is important so visitors understand what experience they are getting. The term hut has different meanings in North America and Europe and should always be qualified by the operator.
- For hut systems, an operator who is able to work out user-agreements with local recreationists, perhaps for shared-use in some situations, is more likely to gain their acceptance and cooperation, thereby reducing vandalism and conflicts.

### **Complementary Activities:**

- Guided tours
- Society run huts
- Shuttle services
- Accommodations / food services in Golden
- Health spas

### **Comments:**

- Golden currently has a substantial number of backcountry accommodations in the region. However, there is still room for expansion in the hut-to-hut touring accommodation sector, especially if the structures are temporary and can be moved to new different locations each year.

## Cross-Country Skiing

### Product Ideas:

(A number of ideas were developed and then clustered into three potential products).

- Local nordic ski trail development based out of lodges and Bed and Breakfasts which might be linked to one another by a ski trail system
- Loppets / ski marathons and other special events
- Development of a long distance nordic ski trail system

## Cross-Country Skiing

### Product Description:

Development of a long distance nordic ski trail system

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Requirement for a large, flat area with good snow conditions (west side of valley)</li> <li>• Road access to at least one end of the trail system</li> <li>• Possible sites include the West Bench, Holt Cr. To Donald</li> </ul>	<ul style="list-style-type: none"> <li>▪ Groomed trails</li> <li>▪ Warming hut facilities</li> <li>▪ Parking areas</li> <li>▪ Signage and maps</li> <li>▪ Fee collection and sales area</li> <li>▪ Ski patrol services</li> </ul>	<ul style="list-style-type: none"> <li>▪ Beginners to advanced skiers</li> <li>▪ Local and regional (AB, BC, Pacific NW)</li> <li>▪ Down hill skiers from Kicking Horse Resort</li> <li>▪ Increasing market</li> <li>▪ Develop nordic destination (i.e. Sovereign Lakes at Silverstar)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Access to private/crown land</li> <li>▪ Tenures/licenses permits</li> <li>▪ Coordination with Kicking Horse Resort to provide nordic component</li> <li>▪ Wildlife issues</li> </ul>
<p><b>Overall Potential – Moderate</b></p>			
<ul style="list-style-type: none"> <li>▪ Long-term participation trends have been holding steady, but for communities with sound investments in infrastructure and services, business has been increasing. Cross-selling to downhill skiers has proven effective in other areas. Multi-activity development may be necessary.</li> </ul>			
<p><b>Competition – High</b></p>			
<ul style="list-style-type: none"> <li>▪ There are many well-established cross-country ski areas in BC and Alberta that offer similar terrain features and snow conditions and in some cases have superior infrastructure and amenities. Canmore, Kananaskis and Sunshine Meadows are nearby competition for valuable Calgary market. Well-developed downhill and resort infrastructure further down the Columbia Valley in Invermere and Radium is also a strong source of competition..</li> </ul>			
<p><b>Business Development – Appeal to soft adventure markets</b></p>			
<ul style="list-style-type: none"> <li>▪ Families with children value good instruction for both the children and adults, activity areas specifically for younger participants, good ski rental facilities in terms of equipment quality and size selection and dining facilities catering to families. Couples will value not only the facilities and trails for the ski activity itself, but the overall ambience of the area, including dining and accommodation.</li> <li>▪ A potential area would have to be thoroughly researched and planned to ensure there is the right product/market mix. The initial focus would be on identifying potential locations for trails, assessing the feasibility of each (what type of skiing?), and deciding what is needed to develop and maintain the trail system.</li> <li>▪ Cooperation and participation of local outdoor clubs is essential.</li> </ul>			

**Keys to Success – Central location, easy access, multi-activity**

- Cross-country ski areas are being transformed into multi-use, winter playgrounds or resort areas to appeal to broader markets. There is unlikely to be sufficient demand for solely cross-country unless other activities are factored into the development.
- While natural features such as varied terrain are important, the built environment is critical – that means things like night lighting, parking, clear signage, high-quality and well-maintained equipment, transportation services and the availability of multi-activity packages can really broaden the appeal.
- A nordic centre will not catch on in a big way unless there is extensive grooming on the trail system, perhaps using snowmobiles to pull small groomers. If trails are groomed skiers can count on good conditions and so will be more willing to drive to the area for a day or weekend.
- Trails for skiers could be utilized in the summer and off-seasons for hikers, bicyclists, horseback riders for connecting various components of a site. But trails would have to allow the user to view and visit a variety of ecological and natural features.

**Complementary Activities:**

- In the shoulder and summer season, trails can be used for other activities such as hiking, horse back riding, mountain biking.
- Provision of accommodation and food services.

**Comments:**

- The activity of cross-country / nordic skiing is growing. Potential for nordic centre to tie in with the new ski resort development at Kicking Horse.

## Cross-Country Skiing

### Product Description:

Local nordic ski trail development based out of lodges and Bed and Breakfasts which might be linked to one another by a ski trail system

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Flat area, with good snow conditions</li> <li>• Trails (minimum of 5 km from door step)</li> <li>• Road accessible</li> <li>• Relative proximity to other lodges/ B&amp;B's</li> </ul>	<ul style="list-style-type: none"> <li>▪ Track ski trails based out of lodge / B&amp;B</li> <li>▪ Accommodation and food services</li> <li>▪</li> </ul>	<ul style="list-style-type: none"> <li>▪ Families</li> <li>▪ BC, AB, Pacific NW</li> <li>▪ Increasing growing market</li> </ul>	<ul style="list-style-type: none"> <li>▪ Marketing and coordination with other lodges/ B&amp;Bs</li> <li>▪ Linked, groomed and maintained interconnecting trail system</li> <li>▪ Tenures / licenses, permits</li> </ul>

### Overall Potential – Moderate

- Long-term participation trends have been holding steady, but for communities with sound investments in infrastructure and services, business has been increasing. Cross-selling to downhill skiers has proven effective in other areas. Multi-activity development may be necessary.

### Competition – High

- There are many well-established cross-country ski areas in BC and Alberta that offer similar terrain features and snow conditions and in some cases have superior infrastructure and amenities. Canmore, Kananaskis and Sunshine Meadows are nearby competition for valuable Calgary market. Well-developed downhill and resort infrastructure further down the Columbia Valley in Invermere and Radium is also a strong source of competition.
- Offering skiing as a secondary activity connected to other outdoor pursuits would enhance the market potential.

### Business Development – Develop a unified activity area

- Unless there was enough cooperation among facilities to development an accessible system of trails for all visitors, then the concept would be too piecemeal to be marketable. Importantly, a funding mechanism would have to be formulated and accepted by participating facilities.
- A critical mass of facilities would have to be identified and coordinated because the chances of gaining the commitment of all facility owners in a given area are low.

### Keys to Success – Central location, easy access, multi-activity

- Cooperation among facilities in terms of access, grooming, signage, maintenance and marketing.
- Any trail system for skiers could be utilized in the summer and off-seasons for hikers, bicyclists, horseback riders for connecting various components of a site. But trails would have to allow the user to view and visit a variety of ecological and natural features.

**Complementary Activities:**

- Joint marketing and promotions, information coordination and sharing
- Summer trail rides, hiking, mountain biking
- Wildlife viewing
- Support of providing an array of activities and services in Golden area
- Development and maintenance of WEBSITE

**Comments:**

- The Golden area currently has a number of lodges / B&B's operating in the area providing this product. However, there is no joint marketing, and product development. Potential exists to greatly enhance this product with current resources and infrastructure.

## Mountain Biking

### Product Ideas:

- Mountain bike shuttle with food service
- Mountain bike and road riding tours, with additional services of bike rentals
- Provision of maps, guide books, etc
- Marketing, promotion and hosting of races, competitions, eco-challenge and other special events
- Heli-mountain biking

## Mountain Biking

### Product Description:

Mountain bike shuttle with food service

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Road access to trail networks</li> <li>• Trail networks</li> <li>• Mount Seven is a existing shuttle need location</li> </ul>	<ul style="list-style-type: none"> <li>▪ Vehicle and trailer</li> <li>▪ Roads</li> <li>▪ Trails</li> </ul>	<ul style="list-style-type: none"> <li>▪ Moderate to high end mountain bikers</li> <li>▪ Local and regional residents</li> <li>▪ AB, BC, Pacific NW</li> <li>▪ Guests at lodges, motels, hotels and campgrounds</li> </ul>	<ul style="list-style-type: none"> <li>▪ Motor Carrier license</li> <li>▪ Appropriate permits</li> <li>▪ Forest Service agreements</li> <li>▪ Liability insurance</li> </ul>

### Overall Potential – Moderate

- While there is growth in mountain biking, most users have their own bikes and transportation, and prefer convenient access to trails where shuttling would not be necessary or where users with more than one car can perform their own shuttling. Still there may be enough demand for a shuttling service if it catered to all forms of outdoor adventure sports.

### Business Development – Multi-activity service

- Potential areas of business development include:
- Providing services for multiple activities including hang/para gliding, biking, canoeing, kayaking and climbing.
- Coordinating expediting services with heli and fixed-wing air services to remote, backcountry areas.
- Providing shuttling services to commercial operators.
- Offering the service to sports/rental stores, accommodation facilities and other sales venues for day trips by self-guided visitors.
- Developing the service in conjunction with maps and guide books visitors may need to undertake self-guided tours.

### Complementary Activities:

- Provision of shuttle service to other recreation activity users (i.e. at Mt Seven for the hand and para gliders).
- Coordination of special events, races and competitions.
- Mountain bike tours and rentals.

### Comments:

- This could be a viable business if coupled with another product such as tours and rentals.
- A market need for a shuttle service currently exists at Mt. Seven.

## Mountain Biking

### Product Description:

- Mountain bike and road riding tours, with additional services of
- Bike rentals
- Provision of maps, guide books, etc.

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Mountain bike trails, logging roads, paved highway</li> <li>• Areas that are not busy with other trail users (i.e. hikers, horseback riders)</li> <li>• Limited areas within National Parks where mountain biking on trails is permitted</li> </ul>	<ul style="list-style-type: none"> <li>▪ Retail outlet</li> <li>▪ Maintained trails</li> <li>▪ Accommodation and food services</li> <li>▪ Trail maps and signs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Families and young adults</li> <li>▪ AB, BC</li> <li>▪ Clients from other tourist sector in community</li> <li>▪ Expanding undeveloped market</li> </ul>	<ul style="list-style-type: none"> <li>▪ Conflicts with other trail users</li> <li>▪ Licenses and tenures</li> <li>▪ Conflicts with woodlot operators</li> <li>▪ Environmental impacts of mountain bikes</li> </ul>

### Overall Potential – Good

- The potential is good for the mountain biking product in the Columbia. BC is growing in popularity as a mountain biking destination and demand will continue to rise. The lack of destination status and facilities for either touring or mountain biking limits the potential across all markets, although there is ample resource potential for expansion.
- Multi-activity packages and tours will be necessary for attracting more touring visitors.

### Competition – High

- Competition is high for the mountain biking participant, regionally and provincially. Squamish, Whistler and the North Shore Mountains of the Lower Mainland are considered by enthusiasts to be among the premier mountain biking destinations for extreme free-riding. Facilities are well developed in many places around the province. In Canada, there are no comparable areas to the US mecca of mountain biking, Moab, Utah.
- It is fairly easy to respond to any rising demand for biking because the business is not capital intensive and services can easily be an add-on feature for existing operators who might be offering other products (providing operators have access to trails). A large number of outdoor adventure operators offer cycling as a secondary activity.

### **Business Practices – Low revenues, excellent returns**

- The average Canadian bicycling tour operator had annual gross revenues of \$151,541 in 1993, with 55% bringing in less than \$50,000 annually. The gross margins are among the highest of all outdoor activities, averaging 31.9% due to significantly low operational expenses. The average number of visitors per operation was 250, trip length was 5.6 days, and per day revenues approximately \$115. These averages include both cycle touring and off-road participants.

### **Business Development – Superior trail system, close in infrastructure**

- Mountain biking and tour operators will need to collaborate with the local accommodation industry and other tourism providers to support their product. Packaging with other guided activities will extend the reach to soft adventurers. Developing commercial ventures in the study area will be a real challenge because it is often convenient to engage in unguided activities. With an extensive network of maps, guides and on-line resources, most visitors can gain a thorough understanding of biking options on the Internet. The key will be providing convenient support services (shuttling, rentals, repair, accommodation, meals, interpretation) to convert these participants to buyers of a value-added product.
- Trails can either be developed separately for each activity such as mountain biking or for shared use. The development of shared-use trails in co-operation with other user groups is more cost-effective in using a limited, common land resource.
- One option is to utilize downhill ski areas which can provide easy access to the alpine and allow for use of ski trails. A mix of purpose-built biking trails (gnarly trails with more obstacles) would be attractive to extreme enthusiasts. In some cases, a destination may find it easier to develop a reputation as a mountain biking area by catering to the more extreme, hard adventure participant through special events, before moving into softer adventure activities. Less challenging trails would be required for catering to the family-oriented market.
- Operators will need to either specialize in a particular type of cycling activity and market segment, or carry a wide selection of equipment if they rent. As well, retail sales of equipment and clothing may present an additional opportunity for these operators.
- Using special, local events such as festivals from which to draw participants can help market development.

### **Keys to Success – Challenge, variety and convenience**

- Developing trails in areas with natural and cultural features.
- For the soft adventure market, selecting routes which are more secluded, yet have interesting destinations, such as back roads.
- Ensuring trails/roads are kept in shape, in co-operation with other user groups.
- Allowing for time to learn and interact with the areas visited.
- Having guides with good knowledge of the area to share with guests.
- Developing a network with enough basic infrastructure for all levels of cyclists.
- Offering free clinics for technical riding and providing practise time for technical manoeuvres before going on a trip.
- Ensuring that trip is planned for meals and accommodation that is in line with the expectations of the participant.
- Moab Utah is the premier mountain biking destination in North America. Its popularity is attributed to accessibility (reachable by major highway), range of trails, good infrastructure (ample camping, chair lift to alpine), frequent events and multi-activity options such as rafting, hiking and climbing.

### **Complementary Activities:**

- Can provide another recreational activity in tourism matrix that helps to keep visitors in the region
- Bicycle repair and sales outlet
- Cycling clinics and instructional programs
- Trail building and maintenance

**Comments:**

- This product could augment the existing services of a bicycle business that is currently established in Golden.

**Mountaineering & Rock Climbing****Product Ideas:**

- Mountaineering and rock climbing schools and courses
- Outdoor activity school
- Small retail outlet
- Climbing gym
- Hostel / accommodation / food services
- Guided trips
- Guide books
- Joint marketing and promotion of mountaineering and rock climbing businesses with other tourism businesses

It was felt that the above ideas need to combine in a single product in order for the business to be economically viable. Note: not all of the ideas need be in the proposed product

## Mountaineering & Rock Climbing

### Product Description:

Full service guiding business with a retail and school component

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Central location accessible to Rogers Pass, Rockies and the Bugaboos</li> <li>• Accessible teaching terrain</li> <li>• Access to alpine areas</li> <li>• Permissible and available road and air access to many remote areas</li> </ul>	<ul style="list-style-type: none"> <li>▪ Retail / office/ school location</li> <li>▪ Access to a climbing gym</li> <li>▪ Access to backcountry huts and cabins</li> </ul>	<ul style="list-style-type: none"> <li>▪ Professionals who have the money, skills but not the time to organize mountaineering / climbing trips</li> <li>▪ School age children</li> <li>▪ Women</li> </ul>	<ul style="list-style-type: none"> <li>▪ Licensed guides</li> <li>▪ Permits and tenures</li> <li>▪ Environmental issues</li> </ul>

### Overall Potential – Moderate

- Natural resources favour development, but potential is modest because of the current lack of developed mountaineering products. The demand for mountaineering is relatively low and derives from a highly specialized market. It is regarded as a high-risk activity and this will restrict its appeal to the “hard” outdoor adventure market. Rockclimbing may have more short-term potential as access will grow as technology improves and more soft adventurers enter the market. But there is also a growing “extreme” market for rock climbing.
- The association with the Canadian Rockies and the National and Provincial park system, and the fact that the area has long been associated with the “Canadian Alps” all enhance the marketability of the mountaineering and climbing product in the Columbia.

### Competition – Moderate

- For climbing, the Columbia would have to be considered a secondary destination behind Alberta (Canmore, Kananaskis) and the Squamish and Skaha areas both of which draw from short-haul markets in the Pacific Northwest.
- The market for mountaineering is small, while many other areas right around the world have much more advanced infrastructure, products and marketing programs geared toward demanding mountaineers and climbers. The majority of the hut system in the Rockies run by the Alpine Club of Canada (ACC) and BC Parks also caters to mountaineers.

### Business Practices – Low revenues, low returns

- The average Canadian climbing operator had annual gross revenues of \$93,578 in 1993, with 69% bringing in less than \$50,000 annually. The gross margins are low, averaging 12.9% due to high labour expenses. The average number of visitors per operation was 213, trip length was 4.7 days, and per day revenues approximately \$113.

### **Business Development – Increase appeal by reducing risk**

- Multi-day products could be enhanced with huts or a hut-to-hut system as an alternative to camping.
- Mountaineering has been made more accessible through the use of helicopters, snowmobiles and glacier ski planes. Operators can appeal to the softer adventure market by using motorized transportation and superior accommodation facilities to offset trip durations and safety concerns. In catering to the soft adventure participant and emphasizing the comforts of lodges and gourmet meals, clients are given the opportunity to “experience” the mountains and the thrill of summiting, without having to learn the hard, technical skills of mountaineering and climbing.
- Indoor climbing and bouldering have been growing in popularity in recent years. Operators in these activity areas will need to deal with overconfidence or lack of technical skill for those climbers moving from indoor to outdoor climbing.
- There is a high demand for safety in mountaineering/climbing which is inherently risky. At the same time, the activity is becoming more mainstream, with customers looking for instant gratification by achieving a tangible goal such as summiting a peak. Operators must screen for customer. Providing adequate instruction to minimize and deal with the risks involved, and establishing reasonable expectations for their customers are also important.

### **Keys to Success – Qualified, skilled guides, matching products to markets**

- Planning routes that take advantage of local features and views without compromising safety.
- Scheduling trips during time of day and year where conditions are most agreeable.
- Easy access to and from base of climb.
- Hiring experienced, personable guides/instructors with certification in mountaineering, first aid, medical and leadership training.
- Training guides/instructors to keep up-to-date in safety procedures, first aid and soft skills.
- Selecting routes appropriate for customers that provide challenge without undue risk.
- Establishing publicized rules and procedures for behaviour and decision-making during the trip.
- Successfully matching markets with products (e.g. for soft adventure, comfortable lodging, for hard adventure, good campsites).

### **Complementary Activities:**

- Guide books
- Accommodation and food services
- Shuttle services to remote backcountry areas

### **Comments:**

- A number of professional mountain guides have guiding businesses in the Golden area. Enhanced cooperative marketing initiatives with other tourism businesses and resources would enhance this product access to the market.

## Canoeing & Kayaking

### Product Ideas:

- Kayak park / race course
- Canoe and kayak school, courses and rentals
- Shuttle service for paddlers with own boats / rental boats
- Bird watching by canoe / kayak
- Heli kayaking
- River camping opportunities

## Canoeing & Kayaking

### Product Description:

Canoe and kayak school, courses and rentals

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Rivers with a variety of grades from flat to class IV</li> <li>• Road access and egress points to rivers and lakes</li> <li>• Suggested sites include Kicking Horse River, Columbia River, Spillimacheen River, Bush Arm and Blaeberry</li> </ul>	<ul style="list-style-type: none"> <li>▪ Canoes and kayaks</li> <li>▪ Accommodation</li> <li>▪ Retail outlet</li> <li>▪ Vehicle and trailer</li> </ul>	<ul style="list-style-type: none"> <li>▪ Adventure recreationists</li> <li>▪ Families</li> <li>▪ School groups</li> <li>▪ Nature oriented clients</li> <li>▪ Paddlers with differing skill levels</li> </ul>	<ul style="list-style-type: none"> <li>▪ Applicable licenses and permits</li> <li>▪ Access points are limited along lakes and rivers</li> </ul>

### Overall Potential - Good

- Long-term trends show rising participation rates among North American markets, particularly among soft adventure participants rather than the extreme enthusiast market.
- All of these markets are seeking a broader outdoor adventure experience and may decide to participate in recreational paddling once in the region. The Columbia can offer a full range of close-in/remote adventures and is very well positioned to attract more visitors.
- The Columbia also has some outstanding rivers that offer higher grades of difficulty that appeal to enthusiasts and extreme sports, although most of the current commercial guiding is for rafting (e.g. Illecillewaet, Kicking Horse).

### Competition – High

- There is extensive competition regionally and across Canada for canoeing and kayaking. Alberta Rockies, Kootenays, Thompson Okanagan and the Caribou offer quality river/lake experiences, with similar features to the Columbia.

### Human Resources – Trained guides

- Instruction services are essential for a guiding outfit so having instructors with the ability to clearly explain, demonstrate and provide feedback and coaching is a benefit. This usually means instructors/guides who have proven certification and demonstrate ability to teach.

### **Business Practices – Good revenue potential and profits**

- The return on capital for the fishing lodge sector in BC is not very good. A 1988 report revealed that an average investment of \$401,000 generated gross revenues of only \$103,000 per operator. This would include land and building costs. An operation with no hard infrastructure and offering only day guiding services could be established for as little as \$50,000, primarily for boat and fishing equipment.
- A comparison between freshwater and saltwater fishing lodges showed that saltwater fishing lodges were more likely to have upscale amenities such as lounges, restaurants, and hot tubs whereas boat rentals and other activities offered were significantly more common at freshwater lodges.

### **Business Development – Variety of trip types and skill levels**

- Nature observation, wildlife viewing and fishing are also attractants for these markets. The German market, especially, is interested in wildlife viewing. Whether canoeing or kayaking, product development has to incorporate some outstanding recreational feature, aesthetic appeal or valued secondary activity. Multi-activity packaging and interpretation is essential.
- People are generally looking for shorter trips, on average for 7 days when travelling abroad. Yield management for tour operators will be increasingly important as a result of running more numerous, short-term trips.
- Tour operators will need to tailor their trips to a diversity of user groups, and may be able to charge more for such customization. This may also provide greater opportunity to generate repeat business with satisfied customers.

### **Keys to Success – Good equipment, water variety, convenient access**

- Having modern, well-maintained equipment is important. This will require ongoing upgrading to newer equipment, which is especially important for river kayaking.
- A variety of water classes will give an operator some flexibility when catering to markets. Good whitewater is essential for enthusiasts, while lower classes are needed when serving lower-skilled, soft adventurers.
- If waterflow is controlled by dams, a coordinated plan to match water conditions with planned usage is important. This means investing time and effort in developing the itineraries and routes for trips. There should be pre-prepared options in the event of poor weather.
- Put-in and take-out sites should be easily accessible while coordinated support should be in place for take-outs.
- Interpreters and guides with a thorough knowledge of the area and ability to convey this in an interesting and informative way will appeal strongly to the soft adventure market which is interested in more than the canoeing or kayaking activity itself. This also applies to food and accommodation planning, making sure that clients have been matched with the anticipated service expectations.

### **Complementary Activities:**

- Nature and interpretive tours along the Columbia valley wetlands
- River camping opportunities along the Columbia
- Accommodation sites along rivers and lakes

### **Comments:**

- The Kicking Horse River is felt to be at capacity in terms of rafting companies conduct tours down the river. The river may have opportunities for advanced kayak schools.
- This product would probably have to be combined with another business product in order to be financially viable.

## Fishing

### Product Ideas:

- Guided tours
- Fishing equipment and supplies rental, sales and retail
- Fishing schools and instruction programs
- Fishing lodge
- Heli fishing
- Wildlife and scenic viewing
- Ice fishing
- Fly fishing

These product ideas have been combined into a single business opportunity of Guiding Services / Retail / Rentals / Instruction

## Fishing

### Product Description:

Guiding Services / Retail / Rentals / Instruction

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Variety of locations in the regions lakes, rivers and streams</li> <li>• Access by road</li> <li>• Heli access to alpine lakes</li> <li>• Based out of retail outlet in Golden</li> </ul>	<ul style="list-style-type: none"> <li>▪ Retail location</li> <li>▪ Accommodation and food services</li> <li>▪ Licensed guides</li> <li>▪</li> </ul>	<ul style="list-style-type: none"> <li>▪ North American casual anglers</li> <li>▪ Youth and families</li> </ul>	<ul style="list-style-type: none"> <li>▪ Adequate fish stocks</li> <li>▪ Conflicts with other users</li> <li>▪ Applicable permits /licenses, tenures</li> </ul>

### Overall Potential - Moderate

- Overall potential is moderate because of lack of recognition, lack of high quality fish resource and dams. Demand is not believed to be increasing significantly, but it is shifting. Non-resident visitors and younger, casual anglers are growth markets.
- The best targets are North American casual anglers who value easy access to the fishing venue, lodge accommodation and settings, and other activities offered during the stay. This segment is more likely to consist of families and couples. The sport fisherman market is already targeted by existing operators in the freshwater fishery.
- Ecotourism continues to grow in popularity. Fishing lodges will need to support activities other than fishing that are non-consumptive.

### Competition – High

- There are several internationally renowned freshwater and saltwater fishing areas in the province with well developed infrastructure, guiding and lodging services.

### Human Resources – Experienced fishing guides

- The typical BC fishing lodge employs around five seasonal personnel, but many smaller operations consist of an individual owner/operator. Guides with a good knowledge of fish, the peak fishing times, all fishing regulations, natural/cultural features and safety and natural hazards in the area are required.

### **Business Practices – Moderate capital costs, average returns**

- The return on capital for the fishing lodge sector in BC is not very good. A 1988 report revealed that an average investment of \$401,000 generated gross revenues of only \$103,000 per operator. This would include land and building costs. An operation with no hard infrastructure and offering only day guiding services could be established for as little as \$50,000, primarily for boat and fishing equipment.
- A comparison between freshwater and saltwater fishing lodges showed that saltwater fishing lodges were more likely to have upscale amenities such as lounges, restaurants, and hot tubs whereas boat rentals and other activities offered were significantly more common at freshwater lodges.

### **Business Development – Partnering and packaging**

- By coordinating multi-activity packages, perhaps with regional golf courses and family-oriented outdoor activities such as hiking, nature observation and boating, then a full season product can be developed.
- Since this is essentially a North American product, the marketing program will consist of niche marketing targeted at consumer shows and display advertising.
- Partnering with accommodation establishments in the area, especially those with no existing tour offerings is one way to quickly enter the market.

### **Keys to Success – Multi-activity packages catering to families, quality gear and amenities**

- Diversification away from pure fishing into other activities will not only broaden appeal to more traveller markets, it will reduce reliance on traditional fishing seasons and allow more options for building an all-season business. In the study area, the keys to developing high value fishing holidays (i.e. pristine, accessible fishing areas, good weather, good quantities and size of fish, easy catching, tenured access to freshwater fishery) cannot be easily assembled. Moreover, fish guiding is an inherently risky commercial outdoor activity. The province estimates the tidal and in-river sport fishery suffered an average 35% to 40% loss in business activity in 1998 as compared to 1997.
- Emphasizing the overall experience, not just catching fish.
- High-quality equipment and boats, as well as the appropriate bait and tackle for the species being fished is essential.
- For catering to the family market, and especially young anglers, some form of instruction (e.g. lessons from beginner to advanced) would help market development.
- Availability of packing and freezing services for out-of-town and overseas customers.
- Above-average food and accommodation.
- Ease of access to and from major centres.

### **Complementary Activities:**

- Shuttle service
- Wildlife viewing, nature observation, hiking, boating
- Fly tying courses
- Fish stocking

### **Comments:**

- A fishing equipment retail outlet currently exists in Golden and this would be a good product to expand into.

## Hiking / Natural & Cultural Features Viewing

### Product Ideas:

- Guided interpretive and nature tour hikes
- Multi day alpine tours
- Wilderness skills / outdoor school

(The above three ideas were combined into one product )

- Retail outlet
- Shuttle service

(The above two ideas were combined into one product )

- Elder hostels
- Retreats (based on themes of music, art, painting, health, meditation, etc)
- Lodge

(The above three ideas were combined into one product )

- Heli hiking

## Hiking / natural & cultural features viewing

### Product Description:

- Guided Interpretive hikes and nature tours

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Wilderness areas, parks</li> <li>• Trails</li> <li>• Scenic natural values</li> <li>• Wildlife</li> <li>• Natural habitats</li> <li>• Solitude</li> </ul>	<ul style="list-style-type: none"> <li>▪ Trails</li> <li>▪ Roads for access</li> <li>▪ Shuttle service</li> <li>▪ Maps / information</li> <li>▪ Certified hiking guides</li> </ul>	<ul style="list-style-type: none"> <li>▪ North American and German markets</li> <li>▪ Seniors for elder hostels</li> <li>▪ Nature lovers of all ages</li> <li>▪ North American, Europeans, Japanese, other international</li> <li>▪ Increasing market</li> </ul>	<ul style="list-style-type: none"> <li>▪ Applicable licenses and permits</li> <li>▪ Wildlife issues – clients want to see bears</li> <li>▪ Conflicts on trails with other users</li> </ul>

### Overall Potential – Excellent

- The potential for development in the Columbia is excellent because of high quality resources, excellent trail systems and visitor markets that place a high value on hiking activity.
- Demand will continue to increase for hiking both as a primary activity and as a secondary activity in conjunction with other products. Because of its accessibility, low skill requirements, relative safety and instant appeal, growth rates among North American and European hiking markets are expected to continue to climb even as the overall population ages.
- The potential for commercial hiking tours spans a full range of options from multi-day trekking tours to short interpreted tours of the frontcountry.

### Competition – High

- There is extensive competition regionally, nationally and internationally for travellers interested in pursuing hiking. The hiking enthusiast in pursuit of a challenging, wilderness trek products has a wide range of products and experiences to choose from. The neighbouring national parks also cater extensively to this market. Many communities and all parks have developed trail inventories and related services that create a safe and interesting product for the soft adventurer/participant.

### Human Resources – Interpretation and safety

- The average Canadian hiking tour operator employed five seasonal personnel in 1993, with the majority of operators have less than four staff. Trained interpreters/guides who are experts in the area and interact well with people are important. First aid training is also a factor for day-hikes as well as for overnight trips.

**Business Practices – Low capital costs, average profitability**

- The average Canadian tour operator offering hiking as the major activity had annual gross revenues of \$167,000 in 1993. Almost two thirds of operators brought in less than \$50,000 and this contributed to a low average gross margin of 6.9%, considerably less than other activities. With an average number of travellers of 1,390, this equated to about \$120 in revenue per traveller.
- Hiking and backpacking does not require a significant investment in equipment but trail and accommodation infrastructure is very important. Since the provision of these components can rarely be justified based on revenues available from hiking, multi-activity tourism has to be accommodated.

**Business Development – Emphasize unique combinations of wilderness features and parks**

- Target park visitors, including tour travellers in promotional activities.
- Niche marketing (e.g. slide shows, local presentations, communication with community groups) should be used to increase regional awareness of newly developed hiking products.
- The operation should be flexible enough to offer day hikes as well as overnight trips. The latter will have to be pressed through tour wholesalers or retail tour operators. Day hikes can be directly marketed to regional visitors who have some flex time for a short excursion.
- Hiking tour routes have to be developed around highly scenic, natural and recreational, and/or heritage/cultural resources. The better the signage, parking, garbage disposal, washrooms, and interpretative facilities the better the trip experience will be for users. Quality map information and investment in facilities is also important.
- In order for a guiding operation to succeed, it must provide a value-added service that hikers cannot obtain through self-guided hikes. This means creating a high-end experience through linkages to cultural/heritage interpretation, wildlife viewing, meals and lodging.
- Develop specialized tours or specialize completely in a specific market segment such as women only, seniors or at-risk youth. Although hiking appeals to a wide range of people demographically, it is important to identify specific target markets and their distinct needs.

**Keys to Success – Interesting features, variable terrain, quality service**

- For soft adventure travellers, well-developed, relatively easy trails, in an uncrowded and pristine environment are preferred.
- Interesting features for nature and/or culture for day trips.
- Overnight trips need access to good camping or hut locations. Soft adventure travellers will prefer lodges/cabins while the enthusiast will prefer tenting.
- Offering activities which add an educational or recreational component such as nature interpretation and wildlife viewing and photography. This may include teaching participants how to minimize impact when hiking and camping in wilderness areas.
- Developing good routes for trips including contingency routes in case of poor weather conditions or other parties.
- Understanding, then exceeding, expectations of participants for meals. An operator should always enquire about dietary restrictions and preferences of participants before the trip and develop a meal plan accordingly.
- For soft adventure, inbound logistics are important – providing the right transportation from a primary site, to the staging area and beyond is critical. This will require detailed planning to ensure that the appropriate vehicles are available and supplies packed.

**Complementary Activities:**

- Accommodations
- Visitor Centre
- Locally focused booking / central registry agency

**Comments:**

- The Golden area is centrally located to some world-class hiking / nature viewing landscapes.

## Hiking / natural & cultural features viewing

### Product Description:

- Lodge / Retreat / B&Bs

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Access to different activities from accommodation on location</li> <li>• Roads / fly in areas / hike in</li> <li>• Wilderness areas, parks, solitude, wildlife</li> </ul>	<ul style="list-style-type: none"> <li>▪ Trails</li> <li>▪ Roads for access</li> <li>▪ Shuttle service</li> <li>▪ Maps / information</li> <li>▪ Certified hiking guides</li> </ul>	<ul style="list-style-type: none"> <li>▪ Soft adventure markets</li> <li>▪ Seniors for elder hostels</li> <li>▪ Nature lovers of all ages</li> <li>▪ North American, Europeans, Japanese, other international</li> <li>▪ Destination market</li> <li>▪ Increasing market</li> </ul>	<ul style="list-style-type: none"> <li>▪ Applicable licenses and permits</li> <li>▪ Conflicts on trails with other users</li> <li>▪ Need for combined marketing</li> <li>▪ Ability to keep visitors for more than one night</li> <li>▪ Capacity of trails, areas to accommodate activities</li> <li>▪ Competition from Banff / Lake Louise town centers</li> </ul>

### Overall Potential – Excellent

- Lodge/resort accommodation supports the development of many other products assessed in this report which cater to the growing soft adventure market. In general, the hard adventure/enthusiast market will be satisfied with minimal infrastructure and the availability of camping facilities.
- Lodges and resorts lodges are generally preferred by the experienced ecotourist, with 66 percent stating them as their preferred choice of accommodation. In contrast, the general touring traveller prefers to stay in hotels/motels (56 percent).

### Competition – Moderate

- Backcountry accommodation is not well developed in BC and, except in the case of fishing lodges, not that well marketed. There are some high quality lodge/resorts in the Canadian Rockies, but also room for expansion.

### Human Resources – Multi-disciplinary personnel

- Cabins/lodges require a significant investment in “human capital” for hospitality services (i.e. food and lodging), interpretation and guiding.

**Business Practices – High capital costs, long-term investing**

- There are few statistics available for backcountry accommodation operations in BC outside of the sport fishing sector. Unaffiliated front-country accommodation facilities such as hotels and motels are rarely profitable without food and licensed beverage services, so backcountry cabins/lodges that are removed from convenient road access will be even more difficult to support.
- A wide range of capital costs are possible, depending on the nature and size of the facility.

**Business Development – Emphasize unique combinations of wilderness features and parks**

- Lodges are becoming multi-activity and multi-season resort destinations for both guided and self-guided activities. By being multi-activity and multi-season, lodges are in a better position to manage their cashflow and staff. It will be important to find complementary activities to leverage staff and equipment across seasons.
- Partnering with guiding operations to offer tours where expertise does not exist in-house.
- Theming is on the rise. 36 percent of leisure travellers surveyed said they were looking for a lodge, resort or hotel with a distinctive theme. Although outdoor adventure could be considered a theme in and of itself, the increasing number of lodges will dilute this as a differentiating factor. Therefore, specialization will become more important for a lodge to succeed.

**Keys to Success – Proximity to activities, uncrowded, sustainability practices**

- A remote, uncrowded, scenic location that has controlled access is preferred for accommodation development. Adding amenities that add to the enjoyment of the overall experience would improve marketability but this will be limited by the availability of capital.
- Providing gear, guides and interpretive services linked to multi-activity experiences.
- Ease of access to and from staging areas.
- Where the facility is geared toward trail-based activities like hiking, biking and nature observation there must be reasonable trails and access.
- Accommodation facilities which conform to sustainability principles. A first priority is facilities with minimum environmental impact. Buildings that demonstrate the use of recycled materials are becoming more common. The use of low quantities of water and electricity is desirable. Where possible, internal electrical generation, from water, wind and sun should take place.

**Complementary Activities:**

- Any number of theme focused retreats (health, food, hobbies, business workshops)
- Tie in with other activities in the area
- Locally focused booking / central registry agency

**Comments:**

- There currently are a number of lodges / B&Bs providing some aspect of this product. Increased joint marketing is felt to be required to improve Golden's ability to increase market share from other "outdoor adventure / natural " communities (i.e. Banff).

## General Issues

**The following points were some general issues and points that were raised during the workshop.**

- Golden should have a professional full-time Tourism Marketing / Coordinator
- There appears to be enough business opportunity for a full-time Special events/ Festivals / Competition Coordinator
- Some of the activities found in the Golden area are unique and cannot be found elsewhere
- Need to ensure that potential tourism product opportunities are not promoted or developed unless there is room for growth in the local market and the environment can withstand the impact.
- Important to keep a balance between tourism development and the natural, wilderness and cultural values of the area.
- It is anticipated that Golden's population will double in the next 10 – 15 years. Important to have designated motorized and non-motorized areas.
- Golden needs to develop a forum / support network for young entrepreneurs.

## Revelstoke Product Ideas

### Snowmobiling

#### Product Ideas:

- Hut to hut tours
- Hotspring to hotspring tours
- Family tours (1-2 hours) – flat trail riding
- Food/fuel/service depot
- Snowmobile camps
- Test track
- Snowmobile skiing area
- Tours for railway fans
- Full Service alpine lodge for snowmobilers
- Trail maintenance and grooming

## Snowmobiling

### Product Description:

Professional (private) trail-grooming business

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>Proximity to trail network</li> <li>Highway access</li> <li>Pull-out to offload trailer</li> </ul>	<ul style="list-style-type: none"> <li>Base for equipment and machines</li> <li>Fuel storage</li> <li>Trailer for hauling machines</li> <li>Fee of service system</li> <li>License to pull trailer</li> </ul>	<ul style="list-style-type: none"> <li>Snowmobile Club</li> <li>Local, regional, provincial and inter-provincial snowmobilers</li> </ul>	<ul style="list-style-type: none"> <li>Snowmobile Club would have to relinquish their current grooming process</li> <li>Private land and right-of-way issues</li> <li>Need to acquire liability insurance</li> <li>Environmental and wildlife guidelines</li> <li>Obtaining tenure</li> <li>Existing tenures/operators</li> <li>LUP's &amp; RMP's*</li> </ul>

### Overall Potential – Moderate

- The market for a professional grooming service is unproven. In order to enter the market, it will be necessary to provide a level of service that existing clubs and operators cannot provide on their own. This may occur if snowmobile use in Revelstoke increases to the point where volunteer resources cannot be relied upon to meet demand and where revenues obtained from user fees can support the financial cost. The demand among commercial operators would not be enough to justify setting up this business.

### Competition – High

- A commercial service would directly compete with volunteer efforts by the snowmobile club and market entry would only be feasible if it could be offered as a cost savings. In the end, a commercial service would only be viable if the main competitor was turned into a client.

### Business Development – Snowmobile club cooperation

- Long-term contracts for grooming services would need to be negotiated.
- The snowmobile club could itself operate this service as a way to subsidize their own grooming needs.
- The revenue potential is small enough that other services would have to be offered in both winter and summer. With the development of any nordic skiing facilities with set-track needs, trail grooming is required. Often, this is done with snowmobiles.

**Complementary Activities:**

- Trails are used in summer too. This could be expanded into a year-round trail maintenance contract.

**Comments:**

- Signage needs to be improved, both for better information and safety purposes.
- Community Futures has lending power to assist new businesses getting started.

\* LUP's & RMP's = Land Use Plans & Resource Management Processes

## Snowmobiling

**Product Description:**

Snowmobile Camps/School/Courses & Test Track facility including sales/rental outlet and guided tours.

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>Near Town or in-town location preferable</li> <li>Flat area suitable for terrain complex including test track</li> <li>Highway access</li> <li>Direct access to trails</li> </ul>	<ul style="list-style-type: none"> <li>Suitable parking</li> <li>Lodge or other warm-up facility with refreshments</li> <li>Office space with communications</li> <li>Experienced staff and guides</li> <li>Access to accommodation and meals</li> </ul>	<ul style="list-style-type: none"> <li>Regional markets</li> <li>Beginners who wish to improve skills to "alpine" level</li> <li>Dealers &amp; manufacturers wishing to test new products</li> <li>Competitors</li> <li>Families</li> </ul>	<ul style="list-style-type: none"> <li>Significant capital investment</li> <li>Acquisition of private or public land</li> <li>Snow conditions at low elevations are inconsistent</li> <li>Environmental and wildlife guidelines</li> <li>Obtaining tenure</li> <li>Existing tenures/operators</li> <li>LUP's &amp; RMP's</li> </ul>

**Overall Potential – Good**

- The large snowfall, the allure of high alpine "powder" snowmobiling areas and the remote and spectacular scenery are all significant advantages for the Columbia District, as is proximity to the large and growing Alberta market.
- Snowmobiling is growing extremely fast. The increased demand and use is coming from residents, regional visitors and short-haul visitors.

**Competition – High**

- Broad choice of destinations are available across the province.
- Province-wide trail network will improve access to quality terrain in affected communities, but it will also increase participation.
- The keys to creating a competitive product (e.g. good snow conditions, variable terrain, integrated and well-signed/maintained trail systems, and access to higher alpine terrain and scenic destinations) are present in the Columbia.

**Human Resources – Certified guides.**

- Certified guides can be a significant bonus when catering to soft adventure and beginner markets where training and safety issues will be a concern. Clear, basic instruction for beginners and an emphasis on safety requires trained, qualified guides.

**Business Practices – High capital costs, good profitability**

- Capital expenditures for equipment can be extensive, or alternatively, leasing from dealerships can be undertaken. Operators can expect to pay \$5,000 to over \$10,000 for sleds.
- The average Canadian snowmobile tour operator had annual gross revenues of \$395,000, but many are based in Quebec where tour companies tend to be much larger than the national average. Average gross margins are in the range of 17%, are among the highest of all outdoor adventure activities.

**Business Development – Minimize user conflicts**

- Since snowmobiling is not allowed in the parks, there will be a growing demand among other winter visitors (especially downhill skiers) who will be interested in snowmobiling as a secondary activity.
- Access to commercial tenure may be problematic because of overlapping terrain with other commercial users.
- The development of designated snowmobile trails can avoid user conflicts. Otherwise, planning for temporal and spatial separation from other activities can improve the visitor experience. Developing trails in co-operation with off-season users such as hikers, mountain bikers and horseback riders is also possible.

**Keys to Success – Good equipment and access to quality terrain**

- Developing strong relationships with and purchasing quality equipment from well-known vendors.
- Ensuring trails are well-maintained by working with local snowmobile clubs and associations.
- Having access to high quality resources.
- Adding value and service to the snowmobiling experience will encourage more visitors.
- Improving infrastructure and hospitality services to encourage longer and more frequent trips.
- Working with government and tourism agencies as well as environmental groups to develop and promote the trail systems.
- Developing a code of conduct for safety and environmental concerns which is strictly adhered to.

**Complementary Activities:**

- Track could satisfy needs of moto-cross and BMX riders. Develop year-round including shoulder season events.
- Corporate retreats and destination holidays to try out new snowmobiles.
- Open water sledding competitions.

**Comments:**

- Host competitions and new product debuts on test track
- Combining many snowmobile services in one large venue has many spin-off opportunities and benefits.
- There is currently a track in Revelstoke and it could be improved (make use of existing facility).

## **Ski Touring**

### **Product Ideas:**

- Hut to hut tours
- Lodge –based tours
- Multi-day, multi-experience tours (Ski touring, snowmobiling, ski-mountaineering, snowshoeing, XC skiing)
- Ski touring Lodge (Mica Area)
- Snowmobile assisted ski touring
- Rental/Sales shop in town

## Ski Touring (plus other winter activities)

### Product Description:

Multi-day, multi experience tours (ski touring, snowmobiling, ski-mountaineering, snowshoeing, XC skiing) based from Revelstoke

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Access to terrain for a variety of experiences</li> <li>• Base activities from location in town</li> <li>• Solitude – quiet spaces</li> </ul>	<ul style="list-style-type: none"> <li>▪ Use existing infrastructure for office</li> <li>▪ Office space with communications</li> <li>▪ Experienced staff and guides</li> <li>▪ Access to accommodation and meals</li> <li>▪ Equipment to participate in various activities</li> <li>▪ Transportation – vans</li> <li>▪ Full service guides</li> <li>▪ Central booking / reservations</li> </ul>	<ul style="list-style-type: none"> <li>▪ Try new markets such as the “far-east”</li> <li>▪ People wishing to try a variety of activities</li> <li>▪ National and international</li> <li>▪ California &amp; Pacific Northwest</li> </ul>	<ul style="list-style-type: none"> <li>▪ Tenure for use of public lands</li> <li>• “Down-days”</li> <li>• Environmental and wildlife guidelines</li> <li>• Existing tenures/operators</li> <li>▪ LUP’s &amp; RMP’s</li> </ul>

### Overall Potential - Moderate

- Demand is low but growing for this product. As skiing technology improves and as lift-service options expand, ski touring will become even more accessible to a broader market.
- The Columbia Forest District is well known throughout the Pacific North West as having some of the best ski touring conditions and areas. Though the Golden area has several commercial backcountry ski lodges, there is still room for development in niche areas. The best potential for commercial development is in association with hut or lodge-based operations.
- Parks Canada has stated that there is potential for some immediate modest growth in the local, regional and international adventure recreation markets, principally among winter backcountry users. Mount Revelstoke and Glacier have focused promotional efforts on the parks’ high quality winter backcountry recreation opportunities.

### Competition – High

- There are several areas in BC and Alberta with quality ski touring terrain.
- Infrastructure is well developed in Alberta Rockies.
- Commercial operators will be challenged to attract clientele, because the park system, local alpine clubs and societies provide access to over 40 public backcountry huts to ski tourers at little or no cost.

**Human Resources – Highly qualified guides**

- Hiring qualified and certified guides and instructors is increasingly important as backcountry visitation increases and the risk to personal safety climbs. The vast majority of commercial ski tour operators use professionally certified adventure travel guides and/or tour leaders.

**Business Practices – Average revenue potential, low returns**

- The average Canadian tour operator offering ski touring as the major activity had annual gross revenues of \$230,122 in 1993, with about 50% bringing in less than \$50,000 annually. The gross margins are not that attractive, averaging 4.2% due to higher-than-average operational expenses. The average number of skiers per operation was 572, trip length was between 4 and 4½ days, and per day revenues approximately \$100. This is believed to be a good representation of the BC sector as almost one half of all operators in the country are based in BC.
- Most operators offer a mix of day-trips and overnight trips with preset packages the norm.

**Business Development – Appeal to participants, beginners and niche markets**

- Telemark skiing will become increasingly popular as will the overall market for nordic skiing. This will create demand for good beginner instruction and also increase the importance of the accommodation and other facilities in attracting the broader market. Specific niche markets such as women-only clinics and tours have good potential for expansion.
- As user fees becomes more prevalent in backcountry areas, more operators may begin working with recreational skiers and clubs to maintain and enhance high quality areas.
- Providing courses packaged with rentals and guided tours will encourage beginners and casual participants to participate.

**Keys to Success – Quality terrain and equipment, remote but safe experiences.**

- Good access to high quality terrain, including permits/tenure for secluded backcountry areas.
- For the destination-based traveller, high quality accommodation and support facilities. If specialized target markets are being attracted, then developing menu and accommodations have to be designed accordingly.
- High-quality, well-maintained equipment, with a variety of sizes suitable for the family market.
- Ability to answer questions from both beginners and experts on equipment and trails in the area.

**Complementary Activities:**

- Natural and cultural features viewing
- Training programs for beginners & families

**Comments:**

- Work with existing operators
- Use cooperative approach to advertising
- Work with MoF to integrate resource extraction with recreation use (e.g. cut more ski runs).

## Ski Touring

### Product Description:

Hut to Hut / Lodge-based ski touring

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Good quality ski touring terrain</li> <li>• Highway access or proximity to heli-port</li> <li>• Solitude – quiet spaces</li> <li>• Appropriate distance between huts</li> </ul>	<ul style="list-style-type: none"> <li>▪ Huts / Lodge (permanent structures)</li> <li>▪ Qualified guides</li> <li>▪ Transportation – vans</li> <li>▪ Central booking / reservations</li> </ul>	<ul style="list-style-type: none"> <li>▪ Growing market for ski touring</li> <li>▪ Attract beginners and intermediates who want to progress</li> <li>▪ BC /Alberta / Pacific Northwest</li> </ul>	<ul style="list-style-type: none"> <li>▪ Tenure for use of public lands</li> <li>▪ Wildlife</li> <li>▪ Environmental issues e.g. waste</li> <li>▪ Security for vehicles</li> <li>• Availability of guides</li> <li>• Terrain constraints</li> <li>• Wildlife guidelines</li> <li>• Existing tenures/operators</li> <li>▪ LUP's &amp; RMP's</li> </ul>

### Overall Potential - Moderate

- Demand is low but growing for this product. As skiing technology improves and as lift-service options expand, ski touring will become even more accessible to a broader market.
- The Columbia Forest District is well known throughout the Pacific North West as having some of the best ski touring conditions and areas. Though the Golden area has several commercial backcountry ski lodges, there is still room for development in niche areas. The best potential for commercial development is in association with hut or lodge-based operations.
- Parks Canada has stated that there is potential for some immediate modest growth in the local, regional and international adventure recreation markets, principally among winter backcountry users. Mount Revelstoke and Glacier have focused promotional efforts on the parks' high quality winter backcountry recreation opportunities.

### Competition – High

- There are several areas in BC and Alberta with quality ski touring terrain and destination status, and numerous lodges targeting the destination-oriented ski tourer.
- Commercial operators will be challenged to attract clientele, because the park system, local alpine clubs and societies provide access to over 40 public backcountry huts to ski tourers at little or no cost.

### Human Resources – Highly qualified guides and hospitality personnel

- Hiring qualified and certified guides and instructors is increasingly important as backcountry visitation increases and the risk to personal safety climbs. The vast majority of commercial ski tour operators use professionally certified adventure travel guides and/or tour leaders.
- Cabins/lodges require a significant investment in “human capital” for hospitality services (i.e. food and lodging), in addition to the professional guide services required for the ski touring.

### **Business Practices – Average revenue potential, low returns**

- The average Canadian tour operator offering ski touring as the major activity had annual gross revenues of \$230,122 in 1993, with about 50% bringing in less than \$50,000 annually. The gross margins are not that attractive, averaging 4.2% due to higher-than-average operational expenses. The average number of skiers per operation was 572, trip length was between 4 and 4½ days, and per day revenues approximately \$100. The average ski tour operator does not generate enough revenue to justify lodge/resort investments.
- Huts or lodges will add to the capital cost of a ski touring operation and necessitate the development of all season products to justify the added investments and improve returns. For developments on Crown land, the form of tenure is an important consideration. Huts on Crown land outside of parks are usually erected by recreation clubs who have been licensed for such development by the Ministry of Lands. There is no exclusivity of access to or within the huts to facilitate public access. Commercial use is considered unethical unless the operator reimburses for that use or otherwise contributes to maintenance and upkeep. Lodge development will require a Crown grant or lease to assure exclusive use of the facility.
- There are few instances of hut development on Crown land by commercial operators because of problems associated with vandalism and unauthorized use by the public. As huts would be usually be constructed on an existing trail, access would be available to all trail users. Even if a private operator constructed new trails for a hut or hut system, BCAL is likely to authorize such development through a Licence of Occupation, which would still allow public use of the trails and access to the hut (although the hut itself could be locked). This lack of exclusivity is likely to deter future commercial hut development.

### **Business Development – Coordinated system and policies**

- As noted in the previous product idea, the expanding market for ski touring is attracting more soft adventurers to the sport and leading to more niche development. Services and products targeted at beginners, families, women and casual participants will enhance market potential.
- These markets are also looking for relatively good accommodation and food services compared to the hard adventurer who is just as likely to camp than stay in a hut or lodge.
- If a hut system is established, facility managers and users must establish clear guidelines for acceptable use and activities and the extent to which they can be done in the area supported by the huts. They must follow practices which minimize the impact on the environment.
- Capital costs can be kept low by choosing to provide minimal amenities that only need replenishment once in a while, or arrange for regular transport of supplies into the hut, either by motorized or non-motorized means.

### **Keys to Success – Quality ski terrain, quality accommodation**

- All the elements of high quality ski touring should be present, including access to high quality terrain, a secluded, wilderness experience and quality guiding.
- For the destination-based traveller, lodge facilities should be high quality. If specialized target markets are being attracted, then developing menu and accommodations have to be designed accordingly.
- For hut systems, clearly identifying the purpose and role of the hut is important so visitors understand what experience they are getting. The term hut has different meanings in North America and Europe and should always be qualified by the operator.
- For hut systems, an operator who is able to work out user-agreements with local recreationists, perhaps for shared-use in some situations, is more likely to gain their acceptance and cooperation, thereby reducing vandalism and conflicts.

### **Complementary Activities:**

- Natural and cultural features viewing
- Remote “think-tanks” and other types of retreats.

### **Comments:**

- Need to recognize aging populations require more mellow terrain
- Executive retreat market is tough to get due to their stringent requirements.

This is a duplication of existing services – is there additional capacity?

## Cross-Country Skiing

### Product Ideas:

- Rental / sales outlet
- Events – races e.g. Lantern ski, biathlon
- Combine XC / Snowshoeing
- Need additional “high elevation” skiing for more consistent conditions
- Courses / instruction e.g. racing school, family & group lessons
- Lodge – with trails from lodge
- Develop flatter terrain

## Cross-Country Skiing

### Product Description:

A variety of Cross-Country skiing events to attract skiers and promote spin-off benefits for the community e.g. Loppet, Lantern Ski

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Trails with a variety of terrain to meet the needs of beginners, intermediate and advanced skiers</li> <li>• Appropriate elevation for consistent snow conditions</li> </ul>	<ul style="list-style-type: none"> <li>▪ An organized, well designed and signed trail complex</li> <li>▪ Grooming machines</li> <li>▪ Fuel, storage equipment and repair facilities</li> <li>▪ Warm-up shelter(s)</li> <li>▪ Event organization skills</li> </ul>	<ul style="list-style-type: none"> <li>▪ Families and local skiers</li> <li>▪ Racers and elite athletes</li> <li>▪ Destination skiers who want to try a variety of activities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Need to develop a trail complex more appropriate for racing</li> <li>▪ Competition from other areas (e.g. Silver Star)</li> <li>• Tenure for use of public land</li> <li>• Environmental and wildlife guidelines</li> <li>• Existing tenures/operators</li> <li>▪ LUP's &amp; RMP's</li> </ul>
<p><b>Overall Potential – Moderate</b></p> <ul style="list-style-type: none"> <li>▪ Long-term participation trends are only average, and the ability to stage events should be tied to a well-serviced nordic centre which will have the capacity to deal with periodic increases in activity.</li> <li>▪ According to Cross Country BC, “super events” could have some potential in the province, especially if they can appeal to the softer, beginner markets. Current loppets are top-down events geared toward the skilled enthusiast.</li> </ul>			
<p><b>Competition – Moderate</b></p> <ul style="list-style-type: none"> <li>▪ There are many well-established cross-country ski areas in BC and Alberta that offer similar terrain features and snow conditions and in some cases have superior infrastructure and amenities. There are 22 major races/loppet in BC this year, primarily in the Interior and the Okanagan.</li> </ul>			

**Business Development – Sanctioned, innovative events**

- Affiliations with official race or event series (e.g. BC Cup Series) is essential. Cross Country BC sanctions races in the province among its affiliated local clubs. Golden and Revelstoke nordic ski clubs are associated with Cross Country BC. National and international sanctions are also possible.
- As with any Cross-country ski product, there must be a favourable nordic ski area or centre and the required hospitality services. A minimum of 30 km events are standard.
- Organizing the loppet is very important and in order to be sanctioned must be innovative and enhance the visitor experience to increase participation and visitation. An assessment of the most successful loppets in other parts of the world could be undertaken. Local members may have to be educated on the different "styles" and "formats" of cross country ski competitions and encouraged to put them into their event hosting plans before a loppet is considered.
- Cross Country BC's Western Edge loppet program may be a model for development. Golden hosted the Huckleberry loppet in February of this year.

**Complementary Activities:**

- Trails can be used for mountain biking and hiking in the summer / shoulder seasons
- Horseback riding possibilities on selected trails

**Comments:**

- This sport doesn't have the "glamour" of alpine skiing and has a relatively finite market.

## Cross-Country Skiing

### Product Description:

Sales & rental outlet in association with an instructional facility.

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Proximity to a well maintained trail complex with a variety of terrain</li> <li>• Lodge or day facility at trail base</li> </ul>	<ul style="list-style-type: none"> <li>▪ Retail and office space</li> <li>▪ Van(s) for transportation</li> <li>▪ Staff / Instructors</li> <li>▪ Manager with expertise</li> <li>▪ Equipment</li> </ul>	<ul style="list-style-type: none"> <li>▪ Local and regional skiers</li> <li>▪ Attract destination market</li> <li>▪ School Groups</li> <li>▪ Tour Groups</li> </ul>	<ul style="list-style-type: none"> <li>▪ Mt. MacPherson needs more beginner terrain – flatter trails</li> <li>▪ Daily grooming required</li> <li>• High volunteer requirement</li> <li>• Environmental and wildlife guidelines</li> <li>• Obtaining tenure</li> <li>• Existing tenures/operators               <ul style="list-style-type: none"> <li>▪ LUP's &amp; RMP's</li> <li>▪ Willingness to pay</li> </ul> </li> </ul>

### Overall Potential – Moderate

- Long-term participation trends are only average.
- Many nordic clubs and cross country organizations are struggling to broaden the appeal of cross country and increase participation levels. Until this happens, demand for services and instruction is unlikely to increase significantly.

### Business Development –

- The feasibility of offering rentals to the cross country market would have to be carefully assessed. Viability can be improved by providing rentals for multiple activities and not just skiing.
- A combination of downhill and cross-country rentals could be targeted at downhill skiers. Cross-selling promotions could generate more rentals. Visitors renting downhill ski equipment could be offered rental packages for Mt. McPherson trails.
- Affiliations with the Revelstoke Nordic Ski Club could be arranged, providing rental savings to members in return for contra-promotion.
- Rentals could be made in cooperation with accommodation facilities and other sales venues for day trips by self-guided visitors. In addition, a service could be developed in conjunction with maps and guide books visitors may need to undertake self-guided tours.

### Complementary Activities:

- This could mix well with other activities such as mountain biking.
- Work in cooperation with accommodation and food suppliers.

**Comments:**

- Cross-country skiing market is increasing – relatively affordable family activity.
- Better terrain for XC skiing at Cranberry Lake area.
- Critical mass needed to attract people

**Mountain Biking****Product Ideas:**

- Downhill trails – technical terrain complex
- Events – races
- Camp / instruction
- Overnight and multi-day tours
- Heli-mountain biking
- Hotspring tours
- Full spectrum mountain bike company
- Tie-in to kayaking and other activities
- Guidebook with GPS info and good photos
- Rentals / Lodge

## Mountain Biking

### Product Description:

Full spectrum mountain bike company offering sales, rentals, tours and instruction. Includes sponsoring races and other “events”.

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Proximity to technical trail complex</li> <li>• Access to a variety of terrain such as old logging roads</li> <li>• Base from visible location in town</li> </ul>	<ul style="list-style-type: none"> <li>▪ Retail / rental space</li> <li>▪ Mountain bike equipment</li> <li>▪ Staff / instructors</li> <li>▪ Van(s) for tour support</li> <li>▪ Accommodation and food services</li> </ul>	<ul style="list-style-type: none"> <li>▪ Local and regional riders</li> <li>▪ Racers</li> <li>▪ Destination riders</li> </ul>	<ul style="list-style-type: none"> <li>▪ Wildlife encounters</li> <li>▪ Environmental impact in sensitive areas (e.g. alpine)</li> <li>▪ Tenure for use of public lands</li> <li>• Road conditions / traffic during tours</li> <li>• Existing tenures/operators</li> <li>▪ LUP's &amp; RMP's</li> </ul>

### Overall Potential – Good

- The potential is good for the mountain biking product in the Columbia. BC is growing in popularity as a mountain biking destination and demand will continue to rise. The lack of destination status and facilities for either touring or mountain biking limits the potential across all markets, although there is ample resource potential for expansion.
- Multi-activity packages and tours will be necessary for attracting more touring visitors.

### Competition – High

- Competition is high for the mountain biking participant, regionally and provincially. Squamish, Whistler and the North Shore Mountains of the Lower Mainland are considered by enthusiasts to be among the premier mountain biking destinations for extreme free-riding. Facilities are well developed in many places around the province. In Canada, there are no comparable areas to the US mecca of mountain biking, Moab, Utah.
- It is fairly easy to respond to any rising demand for biking because the business is not capital intensive and services can easily be an add-on feature for existing operators who might be offering other products (providing operators have access to trails). A large number of outdoor adventure operators offer cycling as a secondary activity.

### Business Practices – Low revenues, but excellent returns

- The average Canadian bicycling tour operator had annual gross revenues of \$151,541 in 1993, with 55% bringing in less than \$50,000 annually. The gross margins are among the highest of all outdoor activities, averaging 31.9% due to significantly low operational expenses. The average number of visitors per operation was 250, trip length was 5.6 days, and per day revenues approximately \$115. These averages include both cycle touring and off-road participants.

### **Business Development – Superior trail system, close in infrastructure**

- Mountain biking and tour operators will need to collaborate with the local accommodation industry and other tourism providers to support their product. Packaging with other guided activities will extend the reach to soft adventurers. Developing commercial ventures in the study area will be a real challenge because it is often convenient to engage in unguided activities. With an extensive network of maps, guides and on-line resources, most visitors can gain a thorough understanding of biking options on the Internet. The key will be providing convenient support services (shuttling, rentals, repair, accommodation, meals, interpretation) to convert these participants to buyers of a value-added product.
- Trails can either be developed separately for each activity such as mountain biking or for shared use. The development of shared-use trails in co-operation with other user groups is more cost-effective in using a limited, common land resource.
- One option is to utilize downhill ski areas which can provide easy access to the alpine and allow for use of ski trails. A mix of purpose-built biking trails (gnarly trails with more obstacles) would be attractive to extreme enthusiasts. In some cases, a destination may find it easier to develop a reputation as a mountain biking area by catering to the more extreme, hard adventure participant through special events, before moving into softer adventure activities. Less challenging trails would be required for catering to the family-oriented market.
- Operators will need to either specialize in a particular type of cycling activity and market segment, or carry a wide selection of equipment if they rent. As well, retail sales of equipment and clothing may present an additional opportunity for these operators.
- Using special, local events such as festivals from which to draw participants can help market development.

### **Keys to Success – Challenge, variety and convenience**

- Developing trails in areas with natural and cultural features.
- For the soft adventure market, selecting routes which are more secluded, yet have interesting destinations, such as back roads.
- Ensuring trails/roads are kept in shape, in co-operation with other user groups.
- Allowing for time to learn and interact with the areas visited.
- Having guides with good knowledge of the area to share with guests.
- Developing a network with enough basic infrastructure for all levels of cyclists.
- Offering free clinics for technical riding and providing practise time for technical manoeuvres before going on a trip.
- Ensuring that trip is planned for meals and accommodation that is in line with the expectations of the participant.
- Moab Utah is the premier mountain biking destination in North America. Its popularity is attributed to accessibility (reachable by major highway), range of trails, good infrastructure (ample camping, chair lift to alpine), frequent events and multi-activity options such as rafting, hiking and climbing.

### **Complementary Activities:**

- Natural and cultural features viewing – take advantage of spectacular sights and local history to enhance the experience.
- Development of a mountain biking guidebook for sale.

### **Comments:**

- Integrate with ski hill – use lifts or drive to the top.
- Need better signs for safety and convenience.

## Mountaineering & Rockclimbing

### Product Ideas:

- Mountain Guide Company and mountaineering school
  - offer different levels of programs
  - branch out to bigger mountains
  - history of mountaineering in Revelstoke
- Heli-mountaineering
  - Families
  - High-end destination market
- Commercial Climbing Wall

## Mountaineering & Rockclimbing

### Product Description:

Full service mountaineering guide company with a “school” for instruction and certification.

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Access to a variety of beginner, intermediate and technical mountaineering terrain</li> <li>• Access and proximity to climbing routes</li> </ul>	<ul style="list-style-type: none"> <li>▪ Permanent base for office and training requirements</li> <li>▪ Climbing gym for wet days and basic instruction</li> <li>▪ Transportation support (e.g. vans, helicopter)</li> <li>▪ Accommodation &amp; food services</li> <li>▪ Qualified guides and instructors</li> </ul>	<ul style="list-style-type: none"> <li>▪ North American market</li> <li>▪ Links with colleges - Students entering guiding profession</li> <li>▪ Destination rockclimbers and mountaineers</li> </ul>	<ul style="list-style-type: none"> <li>▪ Need park permit for national Parks</li> <li>▪ Competition with the Rockies</li> <li>▪ Environmental issues</li> <li>• Park capacity</li> <li>• Environmental and wildlife guidelines</li> <li>• Obtaining tenure</li> <li>• Existing tenures/operators</li> <li>▪ LUP's &amp; RMP's</li> </ul>

### Overall Potential – Moderate

- Natural resources favour development, but potential is modest because of the current lack of developed mountaineering products. The demand for mountaineering is relatively low and derives from a highly specialized market. It is regarded as a high-risk activity and this will restrict its appeal to the “hard” outdoor adventure market. Rockclimbing may have more short-term potential as access will grow as technology improves and more soft adventurers enter the market. But there is also a growing “extreme” market for rock climbing.
- The association with the Canadian Rockies and the National and Provincial park system, and the fact that the area has long been associated with the “Canadian Alps” all enhance the marketability of the mountaineering and climbing product in the Columbia.

### Competition – Moderate

- For climbing, the Columbia would have to be considered a secondary destination behind Alberta (Canmore, Kananaskis) and the Squamish and Skaha areas both of which draw from short-haul markets in the Pacific Northwest.
- The market for mountaineering is small, while many other areas right around the world have much more advanced infrastructure, products and marketing programs geared toward demanding mountaineers and climbers. The majority of the hut system in the Rockies run by the Alpine Club of Canada (ACC) and BC Parks also caters to mountaineers.

**Business Practices – Low revenues, low returns**

- The average Canadian climbing operator had annual gross revenues of \$93,578 in 1993, with 69% bringing in less than \$50,000 annually. The gross margins are low, averaging 12.9% due to high labour expenses. The average number of visitors per operation was 213, trip length was 4.7 days, and per day revenues approximately \$113.

**Business Development – Increase appeal by reducing risk**

- Multi-day products could be enhanced with huts or a hut-to-hut system as an alternative to camping.
- Mountaineering has been made more accessible through the use of helicopters, snowmobiles and glacier ski planes. Operators can appeal to the softer adventure market by using motorized transportation and superior accommodation facilities to offset trip durations and safety concerns. In catering to the soft adventure participant and emphasizing the comforts of lodges and gourmet meals, clients are given the opportunity to “experience” the mountains and the thrill of summiting, without having to learn the hard, technical skills of mountaineering and climbing.
- Indoor climbing and bouldering have been growing in popularity in recent years. Operators in these activity areas will need to deal with overconfidence or lack of technical skill for those climbers moving from indoor to outdoor climbing.
- There is a high demand for safety in mountaineering/climbing which is inherently risky. At the same time, the activity is becoming more mainstream, with customers looking for instant gratification by achieving a tangible goal such as summiting a peak. Operators must screen for customer. Providing adequate instruction to minimize and deal with the risks involved, and establishing reasonable expectations for their customers are also important.

**Keys to Success – Qualified, skilled guides, matching products to markets**

- Planning routes that take advantage of local features and views without compromising safety.
- Scheduling trips during time of day and year where conditions are most agreeable.
- Easy access to and from base of climb.
- Hiring experienced, personable guides/instructors with certification in mountaineering, first aid, medical and leadership training.
- Training guides/instructors to keep up-to-date in safety procedures, first aid and soft skills.
- Selecting routes appropriate for customers that provide challenge without undue risk.
- Establishing publicized rules and procedures for behaviour and decision-making during the trip.
- Successfully matching markets with products (e.g. for soft adventure, comfortable lodging, for hard adventure, good campsites).

**Complementary Activities:**

- Could be combined with ski-mountaineering / ski touring, for year-round business.
- Rockclimbing and bouldering competitions.

**Comments:**

- Similar to service that “Yamnuska” supplies in Canmore
- Co-marketing opportunities with hotel in Rogers Pass
- Market history of Rogers Pass and “classic” climbs like Mt. Sir Donald.
- Climbing gym is a useful adjunct to Mountain School, but requires large volume of “drop-in” business to be successful as a stand-alone business.

## Canoeing & Kayaking

### Product Ideas:

- Rental / sales outlet
- Events – EcoAdventure Race series (combined with other activities)
- Instruction School
- Tours – Arrow Lakes
- Multi-day sea kayak tours
- Guidebook
- Combine with other activities
  - Combine with resort
  - Combine with other “more sexy” destinations and experiences
  - Partner with food & accommodation suppliers

## Canoeing & Kayaking

### Product Description:

Canoeing / kayaking tour company including instruction and skill development courses.

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Access to single and multi-day canoe/kayak routes</li> <li>• Flat water routes and fast water routes</li> </ul>	<ul style="list-style-type: none"> <li>▪ Canoe/kayak gear and equipment</li> <li>▪ Van(s) for transportation</li> <li>▪ Trailer</li> <li>▪ Accommodation and food service support</li> <li>▪ Trained guides &amp; instructors</li> </ul>	<ul style="list-style-type: none"> <li>▪ Regional and destination markets</li> <li>▪ School groups</li> </ul>	<ul style="list-style-type: none"> <li>▪ Licenses &amp; permits</li> <li>▪ Fluctuating water levels on reservoirs</li> <li>▪ Weather conditions</li> <li>• Good road access &amp; egress points</li> <li>• Environmental and wildlife guidelines</li> <li>• Obtaining tenure</li> <li>• Existing tenures/operators</li> <li>▪ LUP's &amp; RMP's</li> </ul>

### Overall Potential - Good

- Long-term trends show rising participation rates among North American markets, particularly among soft adventure participants rather than the extreme enthusiast market.
- All of these markets are seeking a broader outdoor adventure experience and may decide to participate in recreational paddling once in the region. The Columbia can offer a full range of close-in/remote adventures and is very well positioned to attract more visitors.
- The Columbia also has some outstanding rivers that offer higher grades of difficulty that appeal to enthusiasts and extreme sports, although most of the current commercial guiding is for rafting (e.g. Illecillewaet, Kicking Horse).

### Competition – High

- There is extensive competition regionally and across Canada for canoeing and kayaking. Alberta Rockies, Kootenays, Thompson Okanagan and the Caribou offer quality river/lake experiences, with similar features to the Columbia.

### Human Resources – Trained guides

- Instruction services are essential for a guiding outfit so having instructors with the ability to clearly explain, demonstrate and provide feedback and coaching is a benefit. This usually means instructors/guides who have proven certification and demonstrate ability to teach.

### **Business Practices – Good revenue potential and profits**

- The return on capital for the fishing lodge sector in BC is not very good. A 1988 report revealed that an average investment of \$401,000 generated gross revenues of only \$103,000 per operator. This would include land and building costs. An operation with no hard infrastructure and offering only day guiding services could be established for as little as \$50,000, primarily for boat and fishing equipment.
- A comparison between freshwater and saltwater fishing lodges showed that saltwater fishing lodges were more likely to have upscale amenities such as lounges, restaurants, and hot tubs whereas boat rentals and other activities offered were significantly more common at freshwater lodges.

### **Business Development – Variety of trip types and skill levels**

- Nature observation, wildlife viewing and fishing are also attractants for these markets. The German market, especially, is interested in wildlife viewing. Whether canoeing or kayaking, product development has to incorporate some outstanding recreational feature, aesthetic appeal or valued secondary activity. Multi-activity packaging and interpretation is essential.
- People are generally looking for shorter trips, on average for 7 days when travelling abroad. Yield management for tour operators will be increasingly important as a result of running more numerous, short-term trips.
- Tour operators will need to tailor their trips to a diversity of user groups, and may be able to charge more for such customization. This may also provide greater opportunity to generate repeat business with satisfied customers.

### **Keys to Success – Good equipment, water variety, convenient access**

- Having modern, well-maintained equipment is important. This will require ongoing upgrading to newer equipment, which is especially important for river kayaking.
- A variety of water classes will give an operator some flexibility when catering to markets. Good whitewater is essential for enthusiasts, while lower classes are needed when serving lower-skilled, soft adventurers.
- If waterflow is controlled by dams, a coordinated plan to match water conditions with planned usage is important. This means investing time and effort in developing the itineraries and routes for trips. There should be pre-prepared options in the event of poor weather.
- Put-in and take-out sites should be easily accessible while coordinated support should be in place for take-outs.
- Interpreters and guides with a thorough knowledge of the area and ability to convey this in an interesting and informative way will appeal strongly to the soft adventure market which is interested in more than the canoeing or kayaking activity itself. This also applies to food and accommodation planning, making sure that clients have been matched with the anticipated service expectations.

### **Complementary Activities:**

- Natural and cultural features viewing. Lots of heritage themes around Revelstoke like old mines and trails.

### **Comments:**

- Resort could be the base for this activity or a destination / turn-around point.
- Probably need to combine this with other activities to be viable.

## Fishing

### Product Ideas:

- Guided fishing tours
- Heli-fly fishing
- Fishing Resort & Marina
- Courses / Instruction
- Tackle Shop

## Fishing

### Product Description:

Fishing resort and marina

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Lakeshore with scenic views and good fishing</li> <li>• Lake Revelstoke, Arrow Lakes, Kinbasket Lake</li> <li>• Proximity to "four-season" terrain</li> </ul>	<ul style="list-style-type: none"> <li>▪ Resort Lodge and outbuildings</li> <li>▪ Docks, moorage, boat launch</li> <li>▪ Helicopter access</li> <li>▪ Transportation</li> </ul>	<ul style="list-style-type: none"> <li>▪ Albertans</li> <li>▪ Americans</li> <li>▪ Europeans</li> <li>▪ Husbands &amp; Wives</li> </ul>	<ul style="list-style-type: none"> <li>• Environmental and wildlife guidelines</li> <li>• Significant capital investment</li> <li>• Poor condition of public areas e.g. campsites / toilets / garbage</li> <li>• Obtaining tenure</li> <li>• Existing tenures/operators</li> <li>• Lack of boat launches &amp; other supporting infrastructure</li> <li>▪ LUP's &amp; RMP's</li> </ul>

**Overall Potential - Moderate**

- Overall potential is moderate because of lack of recognition, lack of high quality fish resource and dams. Demand is not believed to be increasing significantly, but it is shifting. Non-resident visitors and younger, casual anglers are growth markets.
- The best targets are North American casual anglers who value easy access to the fishing venue, lodge accommodation and settings, and other activities offered during the stay. This segment is more likely to consist of families and couples. The sport fisherman market is already targeted by existing operators in the freshwater fishery.
- Ecotourism continues to grow in popularity. Fishing lodges will need to support activities other than fishing that are non-consumptive.

**Competition – High**

- There are several internationally renowned freshwater and saltwater fishing areas in the province with well developed infrastructure, guiding and lodging services.

**Human Resources – Experienced fishing guides**

- The typical BC fishing lodge employs around five seasonal personnel, but many smaller operations consist of an individual owner/operator. Guides with a good knowledge of fish, the peak fishing times, all fishing regulations, natural/cultural features and safety and natural hazards in the area are required.

**Business Practices – Moderate capital costs, average returns**

- The return on capital for the fishing lodge sector in BC is not very good. A 1988 report revealed that an average investment of \$401,000 generated gross revenues of only \$103,000 per operator. This would include land and building costs. An operation with no hard infrastructure and offering only day guiding services could be established for as little as \$50,000, primarily for boat and fishing equipment.
- A comparison between freshwater and saltwater fishing lodges showed that saltwater fishing lodges were more likely to have upscale amenities such as lounges, restaurants, and hot tubs whereas boat rentals and other activities offered were significantly more common at freshwater lodges.

**Business Development – Partnering and packaging**

- By coordinating multi-activity packages, perhaps with regional golf courses and family-oriented outdoor activities such as hiking, nature observation and boating, then a full season product can be developed.
- Since this is essentially a North American product, the marketing program will consist of niche marketing targeted at consumer shows and display advertising.
- Partnering with accommodation establishments in the area, especially those with no existing tour offerings is one way to quickly enter the market.

### **Keys to Success – Multi-activity packages catering to families, quality gear and amenities**

- Diversification away from pure fishing into other activities will not only broaden appeal to more traveller markets, it will reduce reliance on traditional fishing seasons and allow more options for building an all-season business. In the study area, the keys to developing high value fishing holidays (i.e. pristine, accessible fishing areas, good weather, good quantities and size of fish, easy catching, tenured access to freshwater fishery) cannot be easily assembled. Moreover, fish guiding is an inherently risky commercial outdoor activity. The province estimates the tidal and in-river sport fishery suffered an average 35% to 40% loss in business activity in 1998 as compared to 1997.
- Emphasizing the overall experience, not just catching fish.
- High-quality equipment and boats, as well as the appropriate bait and tackle for the species being fished is essential.
- For catering to the family market, and especially young anglers, some form of instruction (e.g. lessons from beginner to advanced) would help market development.
- Availability of packing and freezing services for out-of-town and overseas customers.
- Above-average food and accommodation.
- Ease of access to and from major centres.

### **Complementary Activities:**

Hiking, Natural and Cultural features viewing, health spa, tackle shop / outdoor equipment retail outlet, skiing, snowmobiling etc.

### **Comments:**

- This product would likely have to be a “four-season” resort catering to people who like to undertake a variety of outdoor activities, but also have all the comforts of home for those who want to be pampered.

## **Hiking / Natural & Cultural Features Viewing**

### **Product Ideas:**

- Tie in with nature walks
- Guidebook – link with park guidebooks
- Trail construction business
- Guided hikes from hotels
- B&B specializing in hiking
- Combine with interpretation
- “Travel Agency” for local opportunities

## Hiking / natural & cultural features viewing

### Product Description:

Guided hiking tours combining interpretation of nature and historical features of interest

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
<ul style="list-style-type: none"> <li>• Access to scenic trails with panoramas and features of interest</li> </ul>	<ul style="list-style-type: none"> <li>▪ Central office and booking services based from town</li> <li>▪ Equipment (e.g. packs and safety provisions)</li> <li>▪ Food and accommodation services</li> <li>▪ Transportation</li> <li>▪ Guides</li> <li>▪ Need to build trails if none exist</li> </ul>	<ul style="list-style-type: none"> <li>▪ North American and German markets.</li> <li>▪ Some drop-in traffic (Highway#1)</li> <li>▪ Hiking Clubs</li> <li>▪ Destination hikers / trekkers</li> <li>▪ Hotel / B&amp;B guests</li> <li>▪ Tour groups / packages</li> <li>▪ Schools / Elderhostels</li> </ul>	<ul style="list-style-type: none"> <li>▪ Tenure / permits</li> <li>▪ Wildlife / environmental issues</li> <li>▪ Safety</li> <li>▪ Limited season for alpine hiking</li> <li>• Condition of trails (poor maintenance)</li> <li>• Existing tenures/operators</li> <li>▪ LUP's &amp; RMP's</li> </ul>

### Overall Potential – Excellent

- The potential for development in the Columbia is excellent because of high quality resources, excellent trail systems and visitor markets that place a high value on hiking activity.
- Demand will continue to increase for hiking both as a primary activity and as a secondary activity in conjunction with other products. Because of its accessibility, low skill requirements, relative safety and instant appeal, growth rates among North American and European hiking markets are expected to continue to climb even as the overall population ages.
- The potential for commercial hiking tours spans a full range of options from multi-day trekking tours to short interpreted tours of the frontcountry.

### Competition – High

- There is extensive competition regionally, nationally and internationally for travellers interested in pursuing hiking. The hiking enthusiast in pursuit of a challenging, wilderness trek products has a wide range of products and experiences to choose from. The neighbouring national parks also cater extensively to this market. Many communities and all parks have developed trail inventories and related services that create a safe and interesting product for the soft adventurer/participant.

### Human Resources – Interpretation and safety

- The average Canadian hiking tour operator employed five seasonal personnel in 1993, with the majority of operators have less than four staff. Trained interpreters/guides who are experts in the area and interact well with people are important. First aid training is also a factor for day-hikes as well as for overnight trips.

### **Business Practices – Low capital costs, average profitability**

- The average Canadian tour operator offering hiking as the major activity had annual gross revenues of \$167,000 in 1993. Almost two thirds of operators brought in less than \$50,000 and this contributed to a low average gross margin of 6.9%, considerably less than other activities. With an average number of travellers of 1,390, this equated to about \$120 in revenue per traveller.
- Hiking and backpacking does not require a significant investment in equipment but trail and accommodation infrastructure is very important. Since the provision of these components can rarely be justified based on revenues available from hiking, multi-activity tourism has to be accommodated.

### **Business Development – Emphasize unique combinations of wilderness features and parks**

- Target park visitors, including tour travellers in promotional activities.
- Niche marketing (e.g. slide shows, local presentations, communication with community groups) should be used to increase regional awareness of newly developed hiking products.
- The operation should be flexible enough to offer day hikes as well as overnight trips. The latter will have to be presold through tour wholesalers or retail tour operators. Day hikes can be directly marketed to regional visitors who have some flex time for a short excursion.
- Hiking tour routes have to be developed around highly scenic, natural and recreational, and/or heritage/cultural resources. The better the signage, parking, garbage disposal, washrooms, and interpretative facilities the better the trip experience will be for users. Quality map information and investment in facilities is also important.
- In order for a guiding operation to succeed, it must provide a value-added service that hikers cannot obtain through self-guided hikes. This means creating a high-end experience through linkages to cultural/heritage interpretation, wildlife viewing, meals and lodging.
- Develop specialized tours or specialize completely in a specific market segment such as women only, seniors or at-risk youth. Although hiking appeals to a wide range of people demographically, it is important to identify specific target markets and their distinct needs.

### **Keys to Success – Trails, interesting features, variable terrain**

- For soft adventure travellers, well-developed, relatively easy trails, in an uncrowded and pristine environment are preferred.
- Interesting features for nature and/or culture for day trips.
- Overnight trips need access to good camping or hut locations. Soft adventure travellers will prefer lodges/cabins while the enthusiast will prefer tenting.
- Offering activities which add an educational or recreational component such as nature interpretation and wildlife viewing and photography. This may include teaching participants how to minimize impact when hiking and camping in wilderness areas.
- Developing good routes for trips including contingency routes in case of poor weather conditions or other parties.
- Understanding, then exceeding, expectations of participants for meals. An operator should always enquire about dietary restrictions and preferences of participants before the trip and develop a meal plan accordingly.
- For soft adventure, inbound logistics are important – providing the right transportation from a primary site, to the staging area and beyond is critical. This will require detailed planning to ensure that the appropriate vehicles are available and supplies packed.

### **Complementary Activities:**

- Mountaineering School.
- Nature and educational tours.

### **Comments:**

- This could be developed into a multi-activity travel business for local opportunities (selling Revelstoke from Revelstoke).