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BRITISH
COLUMBIA



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BRITISH COLUMBIA
MOUNTAIN BIKE TOURISM

Executive Summary

Purpose and Goals

The province of British Columbia is home to world class mountain biking terrain. Downhill, parks, cross country touring, life access, enduro, community trails, festivals, races, camps and tours are all available and together create the ultimate BC Mountain Biking Experience. With such resources, it is time to put BC on the mountain biking map and attract riders of all levels from around the globe to ride on the terrain we call home.

The mountain biking product available in British Columbia is world class. In order for British Columbia to compete on the world stage for destination mountain biking tourism, the province and its stakeholders will have to come together as one solid and united front to prove to the world that British Columbia is a premier destination for mountain biking. This report provides a detailed framework of analysis, comparables, initiatives, and planning that will be necessary to transition the current product into a globally recognizable and desirable entity in the world mountain biking tourism industry.

This framework provides specific deliverables that will ensure the highest level of success when achieved. It will be essential to attain full community buy in of the implementation plan to ensure consistency and effectiveness. A solid foundation throughout the providers will ensure that the global message, identifying British Columbia as a world class destination, will meet expectations. Efforts to maximize acceptance of the implementation will rely heavily on a strong support structure to provide assurance of the benefits and justify the resources invested into the realization of BC's potential. The environment has provided the province with the incredible terrain necessary to compete in this industry on a global scale; however, the terrain is only a part of the equation. In addition to the terrain, BC must recognize that other areas of the world have taken the initiative to express their regions as desirable mountain biking destinations; therefore, competing in the global market requires an investment into the support structure to maximize success.

The creation of the ultimate BC Mountain Biking Experience demands direction and this report provides a foundation for the realizable success of British Columbia's Mountain Biking Tourism industry.

Methodology

The province has the most vital part of the implementation: and that is the terrain. From this point forward numerous steps need to be taken in order for the province to reach its full potential. Extensive research and analysis was performed on other world class mountain biking destinations to evaluate their competitive strengths and determined areas British Columbia could utilize to gain a competitive advantage. Throughout the preliminary stages of commencing the implementation, many dedicated individuals met on numerous occasions to voice their input and take British Columbia into a future of potential and possibilities regarding the mountain bike tourism industry. The resulting information became the structure for the formation of a comprehensive blueprint for success. Meetings and collaboration resulted in the development of key guiding statements to maximize consistency and effectiveness of the overall strategy.

Guiding Statements

- 1. Partnership and collaboration between private and public sectors***
- 2. Communicate diversity of experiences on a provincial basis***
- 3. Recognize work to date completed by Bike Parks BC Resorts***
- 4. Equitable funding approach for stakeholder buy-in***
- 5. Progressive planning to build the provincial sector using staged growth***
- 6. Lead with market ready experiences to create demand***
- 7. Ongoing stakeholder input and evaluation***
- 8. Encourage trail stewardship and capacity building at the local level***

In addition to the guiding statements, comprehensive research and analysis has been collected and organized to provide necessary background information into the existing market characteristics. The research includes analysis of global competition, the state of the present product in British Columbia, and a detailed study into elements of the target audience.

Research into the global competition identified programs around the world that have been successful at drawing consumers. This information noted important initiatives that have been successful and provides insight into new and adapted initiatives for implementation by British Columbia's mountain bike tourism industry.

Analysis of the current state of the industry in British Columbia identified key components that position BC with strong competitive advantages in the global marketplace. Highlighted by the incredible terrain and community support, the messages must express the competitive advantage in ways that differentiate BC from its competition in a positive and desirable fashion. This section of research also focuses on the potential benefits of investment into this industry throughout the province.

The consumer group that represents mountain bike tourism marketplace has a variety of distinct characteristics; therefore, demographical, geographical, and psychographical information was collected to be utilized in the design of the distribution strategy. Consumer information ensures that the message is appealing to the targeted group and the campaign provides a greater return with the most efficiency.

Categories of Strategies

For the province to reach worldwide recognition for its vast variety of mountain biking experiences that it offers the world, there are numerous steps that must be completed. They have been broken down into seven distinct categories and implemented over a period of the next three years; each of these categories has been simplified into specific steps identifying key initiatives, details, and timetables for their implementation.

The categories used to clarify the implementation plan are as follows:

1. Governance and Organization

Objectives and strategies developed in this section ensure that the strategy avoids unnecessary delays and blocks in progress.

2. Finance

This section contains additional objectives and strategies to monitor a comprehensive budget and maximize the potential return on investment.

3. Branding

The mountain biking industry in British Columbia has a number of factors that set it apart from its competition and this section utilizes those characteristics to provide objectives and strategies to define the product and ensure it is well positioned in the global marketplace.

4. Integrated Marketing Communications

Specific and tangible initiatives that expose the product to the desired target audience and attract them to make use of the overall product are clearly laid out in this section. All marketing efforts must remain consistent with the strategy to ensure clear and precise messaging.

5. Product Development

Many initiatives are identified in this section to improve upon an already world class product. To maintain a highly competitive product, the continued development of its elements must be a priority in the ongoing strategic implementation.

6. Services Marketing

A major part of executing key initiatives detailed throughout the plan, this section notes the importance of the human capital in British Columbia and how the people providing the product can be utilized to affirm the region as a world class provider.

7. Packaging

This section details effective methods of delivering the product to the consumers at both the end user point of contact and in terms of the marketing communications.

Implementation Plan & Prioritization of Strategies

The strategies developed have been prioritized using a set of criteria developed by the Provincial Advisory Committee. These include:

Criteria for Selection of Strategies

1. Ability to deliver short term wins in 2010/2011/2012
2. Sustainability of the Mountain Bike Tourism Sector
3. Ability to develop a best model for mountain bike tourism worldwide
4. Need to incorporate a business plan approach (as opposed to pure marketing)

The application of this set of criteria 4 to all strategies has resulted in the following ranking of the seven main business areas for the successful implementation of the mountain bike tourism plan:

1. Governance and Organization
2. Finance
3. Branding
4. Integrated Marketing Communications
5. Product Development
6. Services Marketing
7. Packaging

In order to properly implement the plan, the Provincial Advisory Committee has laid out a three (3) year timeframe whereby certain strategies across all seven (7) business areas. These are outlined below. There no financial budget allocations contained herein since the total budget goal of \$250,000 per annum has not been determined and ultimately becomes a critical part of the Year One execution strategies.

Year One

Governance and Organization

- The Mountain Bike Tourism Association is to assume the lead role and be funded to administer the execution and ongoing development of the Mountain Bike Tourism sector plan
- Convene an executive team of senior management with relevant knowledge and experience to administer the plan; and develop a proper constitution and Board of Directors and three year proposed budget
- Engage Communities, regions and stakeholders to build an economic impact study and build a full inventory of market ready mountain bike experiences

Finance

- Set an initial budget goal of \$250,000 and develop funding mechanisms including funding from Bike Parks BC Resorts; Experiences BC; regional governments; Destination Marketing organizations (hotel tax communities); Regional Destination Marketing organizations; industry members including mountain bike operators; industry suppliers and sponsors

- Establish benchmarks for measurement of the incremental tourism revenues associated with the mountain bike tourism industry including key performance indicators
- Develop trail maintenance funding mechanism in partnership with regional governments; trail passes and mountain bike events and festivals

Branding

- Develop a provincial brand which contains a positioning of BC against the world's best models and focused on core competencies
- Develop logo to reflect positioning and associate with the preferred tag line of "Mountain Biking Lives Here" and enable application of the logo/tag line to recognize the diverse range of mountain bike tourism experiences identified in this plan

Integrated Marketing Communications (IMC)

- Internet Marketing
 - a. Build a comprehensive mountain bike tourism website modeled on Switzerland's mountain bike tourism website and New Zealand' mountain bike tourism website
 - b. Link it to HelloBC.com and regional and destination websites
 - c. Website to be developed to market the provincial brand with trail guide; GPS based trail maps; blogs; trail reports; Website to be accessible from mobile phones and blackberries; and will contain a centrally controlled Mountain Bike Events Calendar
- Social Media
 - a. Develop expertise to create a blog for new website
 - b. Create a following on Twitter and regularly update
- Earned Media
 - a. Host 5 key media annually on assignment – suggested to pursue Outside, Explore, TV, National Geographic, Bike, Decline etc)
- Paid Media
 - a. Create TBC Mountain Bike Tourism logo for use in all communications
 - b. Not recommended to pursue a print mountain bike tourism guide
 - c. Utilize online channels such as pinkbike.com; NSMB.com
 - d. Use magazines for paid media – Bike Magazine for example
 - e. Outdoor retail shows
 - f. Create video with sponsorship and pro's promoting BC
- Earned Media
 - a. Host 5 key media annually on assignment – suggested to pursue Outside, Explore, TV, National Geographic, Bike, Decline etc)
- Promotional Strategy
 - a. Video Challenge on YouTube and prizes to include circle tours in BC
 - b. Cross promote with bike shops and ski resorts to access their customers and offer contests through manufacturers and resort partners

Product Development

- Mountain Bike Experience Product Inventory
 - a. Conduct Survey of stakeholders to include: mountain bike clubs; trail stewardship groups; municipalities; resorts; regional governments; MTCA Recreation Trails division; BC Parks; DMO's and RDMO's. Determine criteria for market ready mountain bike experiences.
- Standardization of Signs and Trail Maps
 - a. Use Tourism BC Mountain Bike Essentials Guide to start process
 - b. Solicit and develop best practices from stakeholders and best models
 - c. Work with MOT to create provincial highway signage to promote trails and trailheads
- Consumer Research
 - a. Assemble and review existing market research (e.g. MBTA, Sea-to-Sky, Whistler, Shuswap Trail Strategy, BC Tourism TAMS)
 - b. Use the templates developed by MBTA for the North Shore/Sea-to-Sky studies
 - c. Using secondary research of the global mountain bike tourism industry, identify main driving forces of change within the mountain bike tourism industry and identify "Key Success Factors" critical for the success of the industry

Services Marketing

- Establish a stakeholder education program and create a tool kit for presentation to key internal stakeholder groups to include: Brand and tag for BC Mountain Bike Tourism; Mountain Bike Tourism Experiences and major targets for each; Trail Standards and Trail Designation; Marketing Strategies; Funding sources and best models resources; Risk and liability management concerns; Outline of Top Ten Success Stories in BC Mountain Bike Tourism citing local communities; Highlight economic benefits to include ROI and the linkages between tourism and travel motivators; Outline how communities and regional governments can be involved
 - a. Establish and communicate market ready mountain bike experience service guidelines and standards for all major operators and mountain bike tourism services utilizing Tourism BC Mountain Bike Essential Book to build capacity at the community level and to develop key success factors that consumers want such as; how to build trails; how to build clubs; trail signage and map standards; trails quality standards; insurance requirements; and bike storage.
- Customer Feedback Loop
 - a. Enable consumers to provide real time feedback via website
 - b. Develop, execute and measure Ongoing consumer experience surveys
- Measures of Accountability
 - a. Develop economic impact analysis for various sectors of the mountain bike tourism industry and develop benchmarks for the success of the Mountain Bike Tourism plan

Packaging

- Mountain Bike Experiences
 - a. Develop online provincial trail guide with menu of options to include accommodation; rentals; activities
 - b. Establish call to action through Hello BC and Inntopia and regional and destination websites

Year Two

Governance and Organization

- Develop an ongoing education program to educate stakeholders and improve funding opportunities
- Create BC Mountain Bike Communities to act as official centres for mountain bike tourism

Finance

- Maintain annual budget of \$250,000
- Seek corporate sponsorships
- Create consumer survey to measure key performance indicators

Branding

- Update best models research to ensure BC's positioning is relevant and accurate
- Educate members concerning brand stewardship
- Tie brand stewardship of Mountain Bike Tourism into the implementation of the BC Recreation Trails strategy

Integrated Marketing Communications

- Internet Marketing
 - a. Develop an online mapping system for mountain bike experiences
 - b. Create online demand and then also funnel consumers towards local and regional websites associated with the relevant mountain biking experience
- Social Media
 - a. Create a following on YouTube through innovative promotions and video
- Paid Media
 - a. Use nontraditional print – Ski magazines Outdoor, Oprah, Canadian Living, MacLean's
 - b. Create TBC industry approved ads in industry publications
- Publicity Strategy
 - a. Create a forum online for press releases; hound the media with stories
 - b. Source 5 BC riders as spokespeople and one TV celebrity
 - c. Plan for Celebrity Riders appearances at key mountain bike events
 - d. Create TBC approved logos for all stakeholders and partners that support (possible revenue source)
- Promotional Strategy
 - a. Promote new brand through Mountain Bike film sector
- Product Communications Strategy
 - a. Create a communications plan that promotes the broad range of trail and travel experiences as identified under this plan
 - b. Market specific experiences and routes that are world class status
 - c. Create specific mountain bike routes and circle tours and include amenities

Product Development

- Establish Provincial Leader is to centralize information, mobilize others, and turn existing opportunities into successes.
 - a. Create sharing agreements between stakeholders who have local inventories of trails, events, and experiences
 - b. Develop a membership base of all stakeholders
- Trail Authorizations
 - a. Continued authorization of new trails and experiences that are accessible to all users
 - b. Implement BC Recreation Trails Strategy
- Incorporate trail designation as trails are built and encourage trail clubs to apply for designation
- Standardization of Signage and Trail Maps
 - a. Create MTCA approved trail ratings system and apply this to all legally approved and market ready mountain bike trails
 - b. Expand upon Bike Parks BC Resorts trail ratings and trail maps for use across all mountain bike trail experiences
- Consumer Research
 - a. Qualitative research to explore and scope out what was happening and why (Community Meetings, Focus Group Research, Retailer Interviews)
 - b. Quantitative research to determine the extent of what was happening (Online Survey, Stakeholder Online Survey)
 - c. Investigate possible partnership opportunities to collaborate with Universities/Colleges (e.g. TRU Tourism 4th Year Research students)
- Development of New Product
 - a. Work with regional Economic Development commissions; Community Futures and Entrepreneurship groups to educate private sector on new opportunities
 - b. Promote Mountain Bike Tourism within leading educational institutions
 - c. Create Designated Mountain Bike Communities

Services Marketing

- Establish and communicate market ready mountain bike experience service guidelines and standards for all major operators and mountain bike tourism services
 - a. Integrate World Host program to the sector – develop and find sponsor for BC Mountain Bike Superhost
- Consumer Recognition Program
 - a. Ensure BC mountain bike communities are competitive with world's best models - Integrate World Host program to the sector – Mountain Bike Superhost and train all front line staff employed by stakeholders on a pay to play basis

Packaging

- Mountain Bike Experiences
 - a. Develop an approved “seal” of approval for mountain bike accommodation, guiding services, related retail using MTCA certification standards similar to approved hotel accommodation

Year Three

Governance and Organization

- Develop an elected Board
- Seek to expand memberships
- Advocate for introduction of “inherent risk” legislation

Finance

- Maintain annual budget of \$250,000
- Build corporate sponsorships

Branding

- Validate brand stewardship and success of branding to promote awareness of the diversity of the mountain bike tourism experiences

Integrated Marketing Communications

- Create awareness campaign to attract more female riders
- Create a visual mountain bike experience promotion for ferries, billboards, stores
- Create Mountain Bike Tourism awards and tie into BC Tourism Industry conference
- Cross promote in other Experiences BC sectors that have similar target geo demographics
- Look to other consortiums for IMC guidance (Nordic, Wine as examples)

Product Development

- Standardization of Signs and Trail Maps
 - a. Create a provincial level of certification for trail builders
 - b. Adopt standardized safety program based on best practices. Standardization of trail ratings system “MTBA or MTCA Approved”
 - c. Consider Canada West Ski Areas Association standards for signage and trail maps
 - d. In each geographic area work towards sanctioning at least one trail in each rating category to serve as the measure by which other trail signage and ratings are measured.
 - would establish a local benchmark – something for local trail builders to reflect on

Services Marketing

- Establish and communicate market ready mountain bike experience service guidelines and standards for all major operators and mountain bike tourism services
 - a. Create Mountain Bike Guiding certification through a recognized academic institution such as TRU.
 - b. Develop Trail Rating System and Standards using local Clubs and MBTA for trail skill levels and for signage and mapping
- Consumer Recognition Program
 - a. Establish Mountain Bike friendly services – transportation/accommodation/restaurants using Scotland best models example

Packaging

- Mountain Bike Experiences
 - a. Package mountain bike experiences with a lead in mountain bike experience and add in other tourism experiences in the regions – culinary; wine; local attractions; Festivals; golf; other outdoor adventure
 - b. Develop packages to attract short haul travelers that include a variety of mountain bike experiences
 - c. Distribution Channels – ensure local stakeholders in a mountain bike community are aware of packaging options including accommodators; bike shops
- Tour Wholesalers
 - a. Work with MTCA and Canadian Tourism Commission to have representation at major trade shows such as Rendezvous Canada
 - b. Create a few epic package options with net rates to offer to wholesalers
 - c. Establish a call to action through Tourism BC/Inntopia
- Package with Gateway Communities
 - a. Offer opportunity to main public sector stakeholders (RDMO's, DMO's, Chambers of Commerce) to pay to play in integrated marketing communications
 - b. Offer opportunity to main private sector stakeholders in gateway communities to pay to play in integrated marketing communications

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“I thought of that while
riding my bike.”
-Albert Einstein

Section 1: Background & Methodology

Purpose and Outcomes

The sector marketing plan for mountain bike tourism is designed to accomplish the following specific goal:

To build a comprehensive plan that will provide dynamic and functional guidance to insure that British Columbia will work towards becoming recognized as a world leader in mountain bike tourism.

“Get a bicycle. You will not regret it if you live”.
Mark Twain

Objectives for the Sector Marketing Plan

The three main objectives for the sector marketing plan are:

1. To develop a specific brand under which BC mountain bike tourism will become universally identifiable and sustainable over the long term.
2. Identify governance, financial, product development, packaging, services, and integrated marketing communication efforts resulting in new business opportunities for commercial operators and communities.
3. To create a provincial community through which resources can be jointly utilized to continue to enhance the recognition of BC mountain bike tourism and continuously improve upon the quality of experience; this co-operative will serve to provide long term sustainability to the industry.

Whether it be the best bike park in the world (Whistler) or the best cross-country epic in the world (Rossland’s 7 Summits), BC has managed to foster every type of riding experience. Throw in a rich cycling history, burgeoning cycling communities and infrastructure — guide outfits, shuttle services, bike shops and bike-friendly coffee houses — a trip to BC is not just a vacation, but a necessary pilgrimage for the discerning mountain biker, (*Tourism Business Essentials*, 2008.)

Mountain bike tourism has arrived globally. Scotland, Switzerland, New Zealand, and key states in the US have created a vibrant and growing tourism sector based on mountain biking. British Columbia has a vibrant opportunity to embrace what’s happening here and to leverage it in an extremely positive way. Thanks to those early mountain biking pioneers on BC’s epic North Shore, bike trails are now found everywhere in our province. From Rails-to-Trails, to commuter networks in all our cities and towns, to well-maintained mountain bike trails, to kids’ jumps and skills parks, BC has an amazing diversity of mountain bike experiences. There are success stories in our province that can be adapted and executed to make mountain biking a safe, fun, highly rewarding sport for not just tourists, but for British Columbians themselves. British Columbia has the opportunity to be a world leader as a region that appreciates and rejoices the freedom, exercise and adventure that comes with what has been called, ‘the noblest invention.’

The Need for Mountain Bike Tourism

The natural environment of British Columbia makes it a perfect destination for world class mountain biking. As a result, the industry already exists and shows the potential to be cultivated into a unique tourism product. British Columbia needs to take notice and develop this industry for a multitude of reasons:

1. Due to little to no intervention, a large entity of unauthorized trails exist throughout BC posing safety and environmental hazards
2. Much of the difficulty in establishing authorized trails is a result of minimal incentive to monitor and maintain these trails
3. Existing mountain biking clubs lack the resources to develop the product to a level that will drive the industry forward
4. Mountain biking attracts a diverse crowd from a variety of backgrounds and these participants are often interested in experiencing more from the area than mountain biking alone
5. Awareness of the industry will stimulate all tourism products
6. Trail promotion will bring attention to the need to ensure environmentally sustainable mountain biking practices are implemented
7. Individual communities with the opportunity to develop this industry do not have the necessary incentive or expertise to design or execute any strategy
8. Opportunity presents itself to create cooperative initiatives and involve First Nations groups¹

The need for structure within the Mountain Bike Tourism industry would enable it the support and resources to become a functioning and controllable sector of the tourism marketplace. As it stands, this industry exists as an infant with little to no development. Great benefits are available if appropriately encouraged and British Columbia will develop the reputation as a world class destination for Mountain Biking.

Background

History

The process to commence the development of a plan to promote British Columbia (BC) as a destination for mountain bike tourism experiences was started with the formation of the Western Canadian Mountain Bike Tourism Association in 2005. Its goal was to have BC recognized for its world class sustainable trails and abundant mountain bike experiences supported by enthusiastic communities and resorts offering high quality services. In a bulletin released in 2006, the MBTA recognized issues related to marketing unauthorized trails in many BC communities and chose to begin its focus on marketing commercially developed lift access bike park resorts. It created the Bikes Parks BC alliance, between five destination alpine resorts, including Whistler/Blackcomb Mountain Bike Park, Silver Star Mountain Resort, Sun Peaks Resort, Kicking Horse Resort and Mount Washington Alpine Resort. These resorts developed a unique mountain bike experience by offering lift accessed downhill mountain biking for

¹ Needs developed with information gathered from document entitled "Mountain Bike Tourism" authored by Tourism Business Essentials dated 2008

wide ranges of abilities and ages. This initial alliance submitted the first application to Tourism British Columbia's (Tourism BC) Experiences BC program in 2006 to allow them to implement a marketing plan for the Bike Parks BC Resorts Bike Parks BC. This initial application sourced \$45,000 of funding from the resorts (Panorama Mountain Village joined in 2007 and Tourism Fernie joined in 2009) and leveraged another \$50,000 from the Experiences BC program for 2007 - 2009. The funds have been used to execute a marketing plan that has conducted benchmark consumer and economic impact research, created awareness of the Bike Parks BC Resorts through print media, encouraged trial through dealer based promotions and involvement of mountain bike manufacturers.

One aspect in the evolution of mountain biking has been its shift from a localized recreational activity to a tourism product. Mountain biking is now one of several outdoor adventure activities in British Columbia recognized for its tourism potential and research indicates that significant numbers of mountain bike enthusiasts travel to go mountain biking, (Tourism Business Essentials, 2008). The province of BC has one of the top international reputations for mountain biking innovation; however, much more collaboration is required to make the most of this, conquer challenges and make BC a true world class mountain biking adventure destination.

While the success of the Bike Parks BC plan was being felt, there began a growing consumer and supplier interest in other forms of mountain bike experiences. These include the development and recognition of mountain bike centres such as Rossland, founded on epic trails such as Seven Summits; the development and recognition of the rail trails of BC as the main core of the Trans Canada Trail providing a new mountain bike experience; the development of key Mountain Bike Festivals (Kokanee Crankworx) and races (Squamish Test of Metal); the growing construction of trails for freeriding, all mountain riding and cross country and the development of urban community trails for riding and several other unique BC mountain bike experiences.

The Western Canada Mountain Bike Tourism Association (MBTA) decided in 2008 to pursue an approach to Tourism BC for the development of a broader marketing plan. The intent of this plan is to expand beyond Bike Parks BC Bike Parks BC to include other world class market ready mountain bike tourism experiences in order to position BC as a unique global mountain bike tourism destination. An Expression of Interest was submitted in the Fall of 2008 to the Experiences BC program at Tourism British Columbia by the MBTA on behalf of the provincial mountain bike sector. It was approved by Tourism BC in early 2009 and the development process was then initiated April 1, 2009 by hiring a facilitator to work with the main stakeholders represented in the application and to commence the development of a provincial marketing plan for the sector.

Creating a mountain biking destination requires an extensive tourism vision and the partnerships of various groups within and outside the community. With a vision and affiliation structure in place, a community is in a much stronger position to critically review its product, and ensure that trails are 'authorized' and ongoing management is taking place. This type of collaborative approach ensures that the issues of maintenance, risk management and insurance can be more readily addressed and the full range of mountain bike experiences properly marketed.

Value of Tourism in British Columbia

Tourism is an important industry in British Columbia and is estimated to be worth \$13.8 billion in visitor revenue in 2008.² Tourism GDP was just nearly \$6.6 billion in 2008, based on a 2002 constant dollar. The tourism sector in British Columbia increased 1.7% in 2008, outpacing the provincial economy for the fifth straight year.³ Tourism employs about 131,000 British Columbians, accounting for one in every eighteen jobs in the province in 2008.⁴

As part of the Ministry of Tourism Culture and the Arts, Tourism British Columbia promotes the **Super, Natural British Columbia**[®] brand to the world. Through programs and initiatives designed to promote and develop tourism throughout the province, Tourism BC works closely with industry partners on a variety of joint marketing and promotional campaigns in British Columbia and in key markets around the world. For more information on Tourism BC's programs visit www.tourismbc.com/communities.

Experiences BC

The Experiences BC product sector development program has been designed to assist product sectors in the earlier stages of product development by creating an overall development and marketing plan. The sector program is intended to be province-wide in scope or be representative of the total available product within the province. Experiences BC is designed to work through cooperative financial partnerships for initiatives in markets as determined by the needs of the sector and Tourism BC program staff.

Western Canada Mountain Bike Tourism Association

The Western Canada Mountain Bike Tourism Association (MBTA) was initially developed by three mountain biking individuals from different tourism backgrounds that have a common vision of enhancing Western Canada's mountain biking tourism product in a sustainable and market focused manner that is supported by community stakeholders and resort operators.

The MBTA believes that by working together British Columbia can exemplify standards of sustainability in mountain bike tourism that will not only care for natural areas, but also create local opportunities and support community pride.

The goal is to have Western Canada recognized for its world class sustainable trails and abundant mountain bike experiences that are supported by enthusiastic communities and operators offering high quality services.

“Cycling is unique. No other sport lets you go like that - where there's only the bike left to hold you up. If you ran as hard, you'd fall over. Your legs wouldn't support you.”
- Steve Johnson

² BC Stats has introduced a new methodology (to British Columbia) for measuring the size (revenue) of the BC tourism industry. The methodology combines supply-side information from businesses on revenue, employment and value-added with estimates of tourism proportions for each industry to estimate the overall revenue, employment and GDP of the tourism industry.

³ Source: *Business Indicators – Tourism Sector Grows, but at a Slower Pace in 2008*, BCStats, July 2009.

⁴ Source: *Business Indicators – Tourism Sector Grows, but at a Slower Pace in 2008*, BCStats, July 2009.

Its stakeholders are divided into two distinct groups: Commercial operators are represented by resorts offering lift-accessed mountain biking products and providing guiding services to destination tourists. The second is represented by communities and the sub groups that are contained within them. This includes municipalities, regional districts, and encompasses mountain biking clubs and associations, DMOs, as well as supporting service providers.

The Western Canada Mountain Bike Tourism Association (MBTA) was officially formed in November 2005 and employ a stakeholder model which is modelled after those set up by Tourism Vancouver Island and other regional DMOs. There are currently approximately 70 registered stakeholders representing a cross section of the mountain bike tourism industry. The sector is diverse and it is expected that the stakeholder base to increase and diversify as knowledge of the MBTA's efforts spread.

Tourism Sector Plan Guidelines

In the preparation of a tourism sector plan, the following principles must be used:

A tourism sector plan serves as the embodiment of the overall vision, economic goals, and serves as a roadmap for the years ahead to achieve a tourism sector's vision with regard to tourism. The tourism plan encompasses three to five years and while it serves as a roadmap, it should also be flexible enough to take new, unexpected opportunities into consideration during implementation.

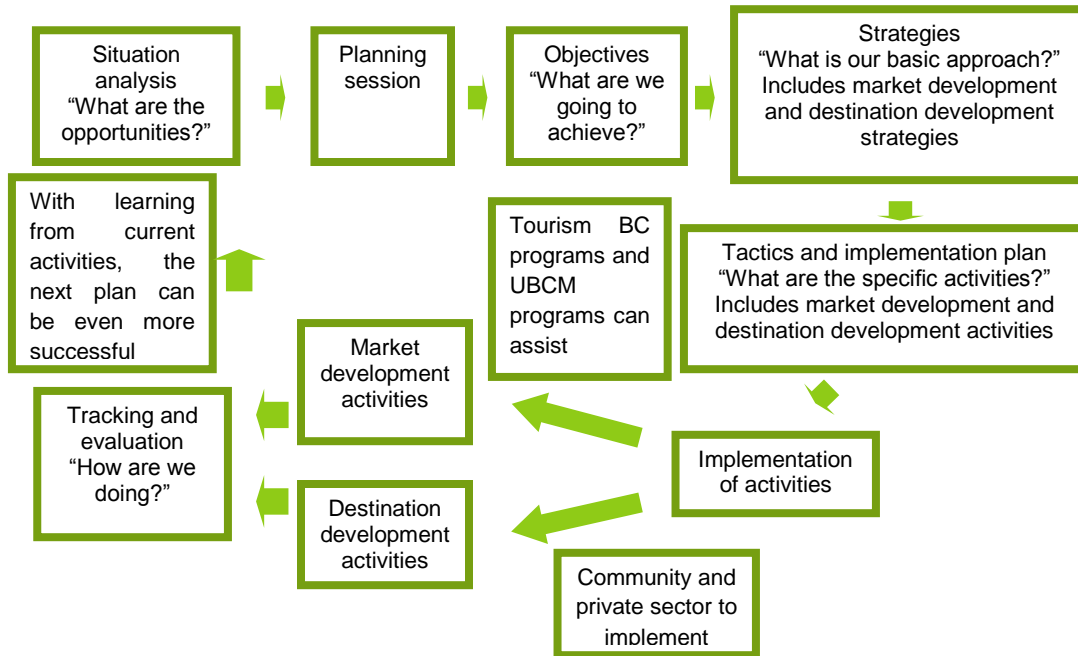
The tourism plan accomplishes the following⁵:

- Defines the business situation – past, present and future.
- Defines the tourism-related opportunities and problems facing the community.
- Establishes specific and realistic business objectives.
- Defines strategies and tactics required to accomplish the objectives.
- Establishes a timetable and pinpoints responsibility for execution of programs.
- Establishes control and review procedures to monitor effectiveness of programs and performance against the defined objectives.

Once the tourism plan is completed and implementation begins, results should be tracked regularly such that an updated plan, with learning from the current year's activities, can be even more effective in increasing tourism to the community. For many sectors, the objectives and strategies should be reviewed, with most of the updates occurring on the detailed tactics. The planning cycle can be illustrated as follows in figure 1:

⁵ Based on the American Marketing Association definition.

Figure 1: The Planning Cycle



"You never escape the presidency. It travels with you everywhere you go. And there's not a moment where you don't think about being President -- unless you're riding mountain bikes as hard as you possibly can, trying to forget for the moment."

- President George W. Bush

Consumer and Travel Tourism Trends

The tourism industry in British Columbia is one dominated by domestic and American travelers. The most recent statistics identify 92% of travelers to BC are coming from parts of Canada and the United States. However, with the passing of the Western Hemisphere Travel Initiative, travelling from the US to Canada will become more difficult as the law requires all those crossing the border to have a valid passport. As of June 1st, 2009 the US government implemented the law completely regardless of whether the traveler crossed the border via land, sea, or air. More details in regards to the WHTI can be found in Appendix #1.

On a positive note, in January 2005 the Canadian government began negotiating an agreement with China to become one of the country's approved destinations. As of December 3rd, 2009 Canada was officially awarded Approved Destination Status (ADS) by the Chinese government providing Canada with full access to over 1 billion potential tourists. Since 2000 BC has experienced a steady increase in Chinese tourism and the ADS should serve to maintain that trend.

Combined with a consumer trend towards active vacations and access to an immense tourism market, the outlook is positive for continued growth in the overall tourism sector and the Mountain Bike Tourism industry.

Canadian and American travelers present the largest potential volume of visitors to BC communities. The U.S. market is expected to continue to be an important international market but the number of visitors is not expected to grow in the short term, with challenges such as new passport requirements, border and security issues, and the lower spending power of the U.S. dollar in Canada. Leisure travel in Canada and the U.S. makes up a larger number of trips and is growing faster than business travel. Baby boomers continue to be the largest demographic segment, with the baby bust/Generation X the second largest segment that is seeing the highest growth rates. Having an Internet presence is important as the majority of American and Canadian travelers use the Internet for vacation planning and about half book online.

BC Tourism Consumer Trends

In the past decade British Columbia has fallen victim to global events such as 9/11, SARS, and Avian Flu. Although these were far worse for the victims, BC realized drastic declines in tourism as a result. Fortunately, consistent rebounds have helped BC achieve steady growth from 2004 to 2006 and record visitors in 2006. The BC marketplace is dominated by BC residents with 20% represented by domestic and American travelers. Only 7% of travelers to BC come from the Asian Pacific and Europe.

While BC residents make up the largest share of visits to BC, they make up a much smaller share of revenue. All other markets contribute a larger share of tourism revenue and their share of visits, with the Rest of Canada contributing the largest share of tourism revenue to BC.

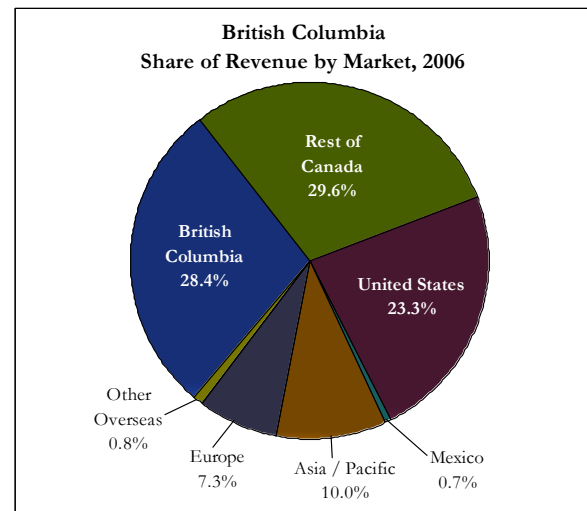
BC residents may not spend as much per trip as other visitors to BC but they travel in BC more often and explore more areas of the province. They tend to travel in BC year-round while visitors from further away tend to confine their visits to the summer months.

Tourism experiences in BC are in various stages of development. BC residents are an important group as they are accepting of varying qualities of facilities, amenities, and customer service levels. BC residents often represent the first wave of visitors as a community or tourism business builds its business. For example, Whistler was a ski destination for BC residents long before it had export-ready facilities.

BC residents helped to build Whistler's reputation and helped generate revenue for it in the early years to allow it to grow to the internationally acclaimed ski destination it is today.

International visitors spend about three quarters more in BC per trip than domestic visitors. Asia Pacific and Europe in particular are high yield markets. This means that BC can generate substantially more revenue without substantially increasing the number of visitors by increasing the percentage of international visitors. The implication from a sustainability point of view is that, with appropriate upgrading, existing facilities can be used to generate greater revenue. The potential for visitation growth is greater with international visitors as BC currently holds a miniscule share of international travel. However, while international visitors have enormous potential and generate higher revenues, they have correspondingly higher standards for facilities, amenities, and customer service levels. As a result, they tend to limit their experiences to those that are export ready. Refer to Appendix #2 for more detail.

British Columbian tourists predominantly come from other spots in Canada and therefore there is little to no cultural differences. As a result, most tourists are readily adaptable to the area and look for



enhancement of their experience in terms of the quality of product provided. Additional information regarding the visitors to British Columbia can be found in Appendix #3.

Groups of activities that Canadian and American travelers participated in while on trips can be summarized based on the 2006 Travel Activities and Motivations Survey (TAMS). The TAMS demonstrated relative market size by activity and differentiates between travelers that participated in an activity while on a trip and travelers whose main purpose of their trip was a specific activity. About 170.5 million American and 18.4 million Canadian people took at least one pleasure trip in 2004/05. A total of 153.1 million North American (Canadian and American) travelers participated in shopping/dining or food related activities while on an out of town pleasure trip in the past two years. Other popular activities on pleasure trips were land-based activities, exhibits/historic sites/museums, water-based activities and theme/amusement parks.

Activities that motivated (main reason for trip) North American travelers' trips differed from activities that were participated in while on a trip. Water-based activities motivated the largest number of trips followed by land-based activities, theme/amusement parks, exhibits/historic sites/museums, festivals and events and the performing arts. More travelers participated in shopping/dining and food related activities on trips than were motivated by these activities.

The BC Mountain Bike Industry

The table below represents the MBTA's best guess at the size and scope of the mountain bike tourism industry. A key task for the MBTA is to continue to promote the association and benefits offered to potential members to ensure that they are able to represent the entire industry.

Type	MBTA Stakeholders	Non MBTA Stakeholders	Estimated Total	% who are MBTA Stakeholders
BC Resorts offering Lift Access Biking	10	0	10	100%
Commercial Operators (Guiding/ Tours)	21	n/a	n/a	n/a
Local Governments/Communities offering Mountain Biking	19	n/a	n/a	n/a
Regional DMOs	2	4	6	33%
Local and regional groups*	35	n/a	n/a	n/a

Note: These figures are very general estimates as it is extremely difficult to obtain hard numbers given the fragmented and generally part time nature of many of the industry's operators.

* Local and regional groups include: local DMOs, local bike clubs and associations, other bike related services not covered.

The majority of revenue dollars within the mountain bike tourism sector are currently represented by the lift-accessed product offered by several BC resorts. In the Sea to Sky corridor for example, Whistler Bike Park (including the Kokanee Crankworx Festival) accounts for 70% of all mountain bike tourism revenue generated⁶. Approximately 141,000 rider days were recorded by BC's 6 bike parks in 2008 and traffic is growing between 5%-15% per year. The largest mountain bike parks have collectively invested over \$6 million in park infrastructure since 1999 and the investment is forecast to continue. Bike park visitors spend between \$99 (same day) and \$133 (overnight) per visit/day⁷, which translates to more than \$14 million in tourism revenue generated by lift access riding alone. Mountain biking festivals and events bring additional visitor revenues to resorts. In 2006, the Crankworx festival in Whistler generated approximately \$12 million in additional visitor expenditures for the resort⁸.

Communities also provide the resources (i.e. trails) that attract riders from all over the world to BC, but quantifying the revenue generated by these public resources is difficult. In 2006, the MBTA conducted a study to measure the economic impact of mountain biking in the Sea to Sky corridor (North Shore, Squamish and Whistler). This study found community mountain bike trails generated \$10.3 million for the three communities. This figure jumps to \$38 million when the Whistler Bike Park and Crankworx Mountain Bike Festival are included in the analysis. This study provided invaluable economic data, not only for lift-accessed product but also for the public trails in the communities of the Sea to Sky corridor. The MBTA is actively seeking opportunities to conduct similar economic impact studies in other BC communities and this need will be identified under the strategies for this plan.

⁶ Sea to Sky Mountain Biking Economic Impact Study, 2006

⁷ Sea to Sky Mountain Biking Economic Impact Study, 2006

⁸ Sea to Sky Mountain Biking Economic Impact Study, 2006

Methodology for Developing Plan

Stakeholders

The marketing plan for the Mountain Bike Tourism sector has been developed through extensive consultation with the stakeholders in this new and emerging tourism product sector. As opposed to a more typical process of using a contracted professional marketing consultant to produce a plan based on information currently available, Tourism BC chose to identify the main stakeholder groups and conduct a series of regional meetings with representatives from as many of the stakeholder groups as possible. The meetings were organized by the same facilitator with the intention of asking the industry stakeholders to contribute to the building of the provincial marketing plan.

The main stakeholder groups identified for invitation to the regional meetings were:

1. Mountain Bike Resorts (Whistler, Fernie, Sun Peaks, Silver Star, Mt. Washington)
2. Commercial Tour Operators
3. Destination Marketing Organizations
4. First Nations
5. Industry Groups (Mountain Bike Clubs)
6. Mountain Bike Tourism Services (Accommodation, food retail, rental, transport)
7. Provincial Government Agencies
8. Regional & Municipal Governments
9. Trail Stewardship Groups
10. Private Landowners
11. Event Organizers (Festivals/Races)
12. Educational Institutions
13. Mountain Bike Consultants
14. Insurance Experts
15. Athletes and Professional Mountain Bikers

The development of the provincial marketing plan was based on a series of provincial wide meetings conducted between May, 2009 and September 2009. The meetings commenced in the Spring of 2009 and continued through October, 2009. These regional meetings were held in Kelowna, Nelson, Nanaimo, Prince George and Vancouver. The full list of attendees and the organizations that they represent are noted in Appendix #4.

At each of these meetings, stakeholders were presented with a custom booklet containing exercises that allowed information to be gathered and used to construct the provincial marketing plan. Expectations and outcomes were determined at each meeting and the attendees were asked to lend their experiences and knowledge to specific areas identified of importance to the creation of the provincial marketing plan. These exercises varied from meeting to meeting in order to build progressively on the information gained at each meeting. At subsequent meetings, information and knowledge gained from a prior meeting was tested and validated and the facilitator would then move to a new exercise rather than cover areas that were already well documented and would otherwise only afford a marginal

amount of new information. This allowed each regional meeting to be unique and productive. The exercises carried out at each regional meeting covered the following components that comprise the provincial marketing plan:

- Internal analysis of the size of the BC mountain bike tourism industry; strengths and core competencies; weaknesses and major issues facing its growth
- External analysis including an identification of major competitors; customer targets and key characteristics of individual user groups
- Major issues required to succeed as a provincial tourism sector
- Goals for the plan and major objectives required to resolve the issues identified
- Major strategies for each category of objective

At the end of each regional meeting, attendees were asked to volunteer their time to participate in a Provincial working committee to meet twice in Vancouver. This working committee was formed in the late fall and had its initial meeting in December 2009 in Vancouver. A list of those individuals comprising the provincial mountain bike tourism working committee is contained in Appendix #5. From this meeting, several working committees were formed to gather further strategic recommendations and present them back to the facilitator for inclusion in the draft plan. A draft of this plan was subsequently prepared for the committee members and reviewed at the second meeting of the Provincial working committee to be held in March, 2010. After a thorough review, the draft was revised to form this current plan.

“Nothing compares to the simple
pleasure of riding a bike”
-J.F.K.

Expectations of Stakeholders

After a series of regional meetings held across the province of BC, a realistic list of expectations was created from those who are involved:

- Build a stronger industry and create a definitive brand for marketing BC as a mountain bike destination
- Need ongoing research and well resourced marketing plan – not a huge bureaucratic plan
- Instructional camps need to be considered as part of the mountain bike experiences
- Consider the role of road biking as a possible alliance partner with this sector
- Identify more innovative sources of funding – for example – Events and Festivals taxes; User fees; Regional and local governments’ appropriations; RDMO’s and DMO’s contributions
- Tie in the new web marketing of BC recreation sites as part of the integrated marketing communications experiences
- The implementation of BC Recreation Trails Strategy is important adjunct to the marketing plan; for example trail access and access road maintenance must be considered as the mountain bike trails are marketed to the world
- Promote all mountain bike experiences as opposed to a few

- Focus on “market ready” mountain bike experiences
- Trail Authorization needs to be part of the plan so that BC can market “legal” trails and trails for specified uses
- Address a mechanism for building alliances and sourcing funding and trail management from those organizations that benefit from the marketing of Mountain Bike Tourism (i.e. services such as hotels)
- Address the need for a revenue stream for mountain bike trail maintenance flowing back to the community
- Build on the success started by the Bike Parks BC Resorts
- Market a safe experience that creates a more diverse set of mountain bike tourism experiences
- Incorporate education of people about mountain biking benefits
- Provide economic analysis and benefits of mountain biking to give credibility to the plan across the province
- Product development needs to play a role in this plan and not just integrated marketing communications
- Brand trails for specific user experiences and user needs
- Build support for mountain bike tourism from within private sector as well as the government
- Market to communities for their involvement

“Life is like riding a
bicycle- in order to keep
your balance you must
keep moving”
-Albert Einstein

Vision, Mission, and Guiding Principles

Overview

A vision is a future state of being – it identifies where the stakeholders collectively desire to take the all of BC’s mountain bike tourism experiences as a sector. The vision developed provides a sense of direction supported through the regional meetings and vetted by the Provincial working committee. It is inspiring and describes what the sector plans to achieve.

Vision Statement

To Be Recognized As the Most Diverse Mountain Biking Destination in the World

Mandate and Mission

The mandate and mission is a summary of the business purpose for the mountain bike tourism sector. Essentially, it answers the question “What will we do to make mountain bike tourism a success?” Does the mission and mandate tell us who we are; what we do and why we are doing it?

Mission Statement

To create and execute a provincial marketing plan for mountain bike tourism in partnership with a comprehensive stakeholder group representing all interests associated with mountain bike tourism.

Guiding Principles

Guiding principles establish the foundation to guide the development and implementation of the marketing strategy for the provincial mountain bike tourism sector.

Guiding Statements

- 1. Partnership and collaboration between private and public sectors***
- 2. Communicate diversity of experiences on a provincial basis***
- 3. Recognize work to date completed by Bike Parks BC Resorts***
- 4. Equitable funding approach for stakeholder buy-in***
- 5. Progressive planning to build the provincial sector using staged growth***
- 6. Lead with market ready experiences to create demand***
- 7. Ongoing stakeholder input and evaluation***
- 8. Encourage trail stewardship and capacity building at the local level***

Mountain Bike Tourism Experiences

British Columbia possesses an abundance of tourism experiences that set it apart from the rest of world's leading mountain bike jurisdictions. It offers a diversity that appeals to a broader target audience than any other mountain bike tourism destination; depth that displays the incredible number of experiences within each category; a strong travel experience that includes bike friendly accommodation; après bike activities; access in terms of air and road to all parts of the province; and sheer beauty for a province that is blessed with scenic, natural, inspiring settings in which to ride.

Trails are the core component and resource base of the mountain bike tourism product. BC's trails offer a unique experience that allows the rider to connect with the character of the land and even the local culture. This is seen in the increasing appeal of 'signature trails' and unique landscape settings that have the ability to motivate mountain bikers to travel to a destination or region.⁹

It is these experiences that will form the provincial mountain bike tourism product and create a provincial approach to branding British Columbia as one the world's premier mountain bike experiences and create awareness, interest, trail and repeat visitation from consumers.

The following categories of experiences have been identified and grouped according to their unique supply factors:

Lift Access Mountain Biking

The emergence of ski resorts that provide a day experience for mountain bikers like none other has catapulted BC into the limelight. Using ski lifts that have been fitted to allow mountain bikers to ride a lift up a mountain with their mountain bike accompanying riders on a separate chair allows mountain bikers of all abilities to descend the mountain resorts trails which have graded in a similar manner as ski runs for novice, intermediate and expert riders alike. It attracts a wide range of abilities and all ages that enjoy the thrill of riding downhill, the beauty of an alpine resort in the summer and the exercise associated with mountain biking. BC is world renowned for its technical trails and innovative trail construction techniques. The actual discipline involves riding a sustained descending trail that ends at a lower altitude than it began. The terrain can be graded in terms of difficulty from novice to expert

Technical Rides

BC is known as the birthplace of freeride which involves riding, generally on a mountain bike specific trail network, designed with a wide variety of trail features, both natural and man-made, for a variety of skill levels from beginner to expert. This experience primarily involves ascending mountains via resource access roads and then descending via advanced technical single track trails, a lead example being the North Shore of Vancouver, but trails exists throughout BC, and abundantly in the Sea to Sky, Kootenays, and the Thompson Okanagan regions. It is a discipline that is between downhill and cross-country since it primarily involves conquering obstacles and performing technique moves. It involves specific bike handling skills and techniques.

⁹ Information was gathered from Tourism Business Essentials drafted in 2008

Over recent years, the technical mountain bike experience associated with free riding has expanded and evolved due to technology in bikes. This genre is called all-mountain/Enduro riding. It generally involves, longer, more “epic” mountain bike specific rides. These can range in distance from a few hours, to a full day trip (eg: 7summits in Rossland). The trails generally involve more climbing and will generally be more “Natural” (no man made stunts).

This category of mountain biking experience offers a more challenging experience for those seeking adventure and for those who have a strong passion for mountain bike at a technical riding level. It is also more fitness based, and attracts people looking to have fun, but simultaneously obtain a good aerobic workout.

Cross Country Wilderness Rides/ Touring

It is practiced on trails featuring a variety of terrain and routes that comprise of uphill, downhill, and flat sections. Trail types can vary from dirt roads to technical single track and vary in length. This experience offers short and long distance trail rides for circle tours or point to point travel. A lead example is the Spirit of 2010 Trail Network with over 800 km of contiguous rail trails. The trail corridor connecting the Sea to Sky Trail from Squamish to D’Arcy is also gaining momentum in the means of visitors making the trek to riding the trail and is boosting the local economic activity, (Sea to Sky Mountain Biking Economic Impact Study - Whistler Results.)

Community Trail Rides

This experience offers a broad spectrum of easier mountain bike experience generally in more urban environments using gentler grade terrain that enables families, couples to enjoy a leisurely mountain bike ride. Community trails exist in both urban with some areas offering rural combination of paved and unpaved trails for light recreation, a lead example being the Galloping Goose Trail in Victoria and the Mission Greenway in Kelowna.

Mountain Bike Festivals / Races

Festivals in B.C. have emerged as attractions in their own right and B.C. Mountain Bike Festivals such as Crankworx or the Squamish Test of Metal Race allow for a blend of experiences including free riding, cross country riding and racing. In 2006 Crankworx was viewed by 50,000 unique individuals, it is Whistler’s high adrenaline mountain bike festival with nine days of incredible, gravity-defying freeride competitions, pro-riding demos, music and entertainment. Creston, BC also hosts the Goatstyle Bike Jam, which is North America’s largest open jump competition/festival. This event attracts hundreds of competitors and their family to Creston every year. Kelowna has a similar event, the Center of Gravity, which combines mountain bike jumping with volleyball and music on the beach in City Park. This event features some of the world’s top riders, along with showcasing up and coming local talent.

Multi-day bike races such as stage races BC Bike Race, Intermontaine Challenge and Trans Rockies are fully supported events that attract riders from all across the globe.

Skills Parks

As mountain biking has become recognized as an athletic pursuit, a variety of skills parks have been developed either by trail clubs, municipalities, regional districts or by local trail enthusiasts that enable primarily a younger audience to practice skills to be applied for more technical riding either in the wilderness or at mountain bike resorts. They are generally local in nature but offer a unique experience for a younger audience. They also provide an opportunity for mountain bike guides and tour operators to assess client skills and operate skills clinics. Skill parks are usually a variety of natural obstacles and constructed features all arranged in a controlled and compact area.

Mountain Bike Instructional Camps and Tour Operators

Instructional camps for all levels of skills offer an interactive social and educational experience. They appeal to those who want to learn how to ride different trails and improve their abilities. Lead examples are Endless Biking, MMR camps, and Dirt Series.

Some of the camp operators also offer tours however there are a number of companies offering tours to some of the more pristine riding areas and in some cases feature well known riding talent as guides/coaches. Examples include Bareback Biking, Bush Pilot Biking and Whistler Mountain Bike Guides.

BC owned and operated Tyax Air offers a unique special fly-in mountain bike wilderness experience. The business offers single or multi-day packages for a truly unique biking excursion that commence at the Tyax Mountain Lake Resort nestled in the Southern Chilcotin Mountain (tyaxair.com).

“Great things are done
when men and mountains
meet. This is not done by
jostling in the street.”
-William Blake

Section 2: Best Practices

Best Models Competitive Review

As part of the global development of mountain biking as a tourism sector, BC can learn from other jurisdictions to develop the marketing plan and more quickly adapt the BC plan for implementation. A research review of leading mountain bike destinations was conducted to assist with the formation of this marketing plan. Specifically, Scotland, Switzerland, and Oregon were investigated. Within each destination, the following information was gathered:

1. Types of mountain bike experiences
2. Positioning
3. Branding
4. Marketing Strategies

The results of the best models competitive review are highlighted below and further results are contained in Appendix #6. A summary of major findings follows.

Scotland

Scotland is quickly becoming recognized as one of the great destinations for mountain biking in the world and the number one destination for the sport in Europe. In both 2005 and 2006 the IMBA gave the country a grade A+ in the Global Super Star category within the IMBA report card. In fact it has been suggested that Scotland may surpass British Columbia the spiritual home of mountain biking and as the best place to go biking in the world. Scotland claims that the diversity of the terrain along with its breath taking scenery is what provides its competitive advantage.

The growth and success that the country has achieved can be attributed to the dedication that has been devoted by Forestry Commission Scotland (FCS) to develop and promote mountain biking through the use of various festivals, conferences and the development of major centers such as 7stanes center of excellence. Specifically, a recent study conducted by the Scottish Enterprise (SE) and FCS noted that there has been an increase in mountain biking trips within Scotland of 82 per cent from 2006 to 2007.

Mountain Biking Experiences

Scotland offers a diversity of mountain biking experiences for participants, spectators, and those interested in developing the sport within the country and globally. There are instructional camps and skill parks that cater specifically to the sport, a variety of festivals and events to choose from and lastly a mountain bike conference.

Mountain Bike Instructional Camps

Scotland provides instructional camps that cater towards riders of all skill levels that provide individuals with information to enhance their riding abilities and opportunities to become socially involved within the sport. The most popular clinics found at these camps include first aid training, navigation, maintenance and suspension workshops.

Skill Parks

Lecht 2009 is considered to be Scotland's leading Skill Park and provides riding for those dedicated to improving their techniques. Lecht provides riders with an assortment of dirt jumps, bomb holes, berms and riding features built from rock (Lecht, 2009).

Festivals

Scotland is the host to many mountain bike festivals that continue to grow in popularity each year. Domestically there are several grassroots festivals that include the Round Stra'ven 50Cycle Challenge, Ultra Run along with the Bike 500 Miles for Charity with Trailbrakes, and the Wikerman festival that target mountain bikers. The Nissan UCI Mountain Bike World Cup in Fort William is the main international event for the year.

Competitive Positioning

Scotland is currently in the growth stage within the industry life cycle for mountain biking. One of the main reasons why Scotland has been able to effectively position itself as an emerging world leader in the sport is due to the government's dedication in promoting and growing this sector. Specifically, FCS works in partnership with the government of Scotland in building long term and sustainable growth for mountain biking. It does so by investing heavily in creating high levels of consumer awareness of the Scottish brand and by investing in various trails. FCS has also dedicated a large portion of their website to mountain biking and has created a synchronized system for mountain biking trail grades, users safety, a forest cycling code, as well as information regarding riding skills and tips. Furthermore, Scotland's National Tourism Organization has developed a synchronized system that is known as visit Scotland's Cyclist Welcome Scheme. This system involves over 1,000 establishments that provide services that cater specifically to the needs of cyclists. A specific Logo has been developed so that cyclists can associate establishments that provide additional facilities for mountain biking tourists. Please see Appendix #7 for the logo and Appendix #8 for more specific details in terms of what the scheme involves.

Being the host to the UCI Mountain Bike and Trails World Championship is a major competitive advantage that Scotland has over other mountain bike destinations. This event has allowed Scotland to not only bring the world's best riders to the country but has the ability to increase the level of exposure as an ideal destination globally. Furthermore, by hosting major conferences such as the World Mountain Bike Conference, Scotland is positioning itself as a leader rather than a follower in the industry. Thanks to their renowned and memorable scenery, wide diversity of easily accessible trails Scotland easily has the ability to become the choice destination for any mountain biker.

Brand

Scotland's brand campaign is very straight forward with the simple message to "Live it". This fits in line with how the country is branding itself in terms of mountain biking. Specifically, Scotland brands itself as the number one biking destination in Europe and proudly communicates to its target audience that it has been named twice by the IMBA as a "Global Superstar" and that it is the first nation to have achieved back to back global superstar status. High quality, adventure and novelty are the images that it wants to have associated with its brand. The UK Forestry Commission also helps to build this brand by

providing a promotional video on its website. The video is high in energy and showcases various mountain biking parks and promotes events such as the UCI world cup. It also showcases additional services such as cafés, bike hires, bike wash shops, as well as other outdoor recreational activities. Some of the tag lines used throughout this video include:

- “Trails to beginners to expert
- “Some of the world’s best mountain biking”
- “Great location, awesome trails, stunning scenery”
- “Skills areas guides and tuition improve your riding”
- “Fun for wee kids and big kids”

Mountain Biking Experiences

Promotion

There has been a high level of time, energy, and funding that continues to be dedicated from the government of Scotland towards the promotion of mountain biking. Specifically, the National Tourism Organization has allocated £1.5 million for marketing campaigns including additional domestic tourism campaigns. This also includes activity in Canada and Europe; however it plans to maintain a stronger focus in more challenging markets like the USA. There are two main methods that the government promotes mountain biking within the country. These consist of the internet through the main tourism web page Mountain Biking Scotland: the official mountain biking site of Scotland’s National Tourism Organization and through an Adventure pass. Each one of these will now be described briefly.

Mountain Biking Scotland: The Official Mountain Biking Site of Scotland’s NTO

Mountain Biking Scotland is an extremely user friendly website that provides fast and reliable information for those interested in participating in the sport during their time in the country. Downloadable mountain bike brochures along with a mountain bike podcast are the two tools used to communicate information to users. In January 2007 VisitScotland launched a new guide to mountain biking in Scotland. The 84-page guide is free and can be requested through VisitScotland’s dedicated mountain biking website or through the VisitScotland National Information and Booking Line. In addition to official endorsement and riding tips by Steve Peat - UCI Mountain Bike-Downhill World Champion in 2002, 2004 and 2006, the guide gives in-depth information about trails, safety and tuition, as well as the new Scottish Forestry Commission trail grading system.

Adventure Pass

Scotland promotes mountain bike tourism in the country with the promotion of the Adventure Pass. This Adventure Pass offers discounts and special offers on 50 adventure activities. The hope is that the pass will allow individuals both at home and abroad to “Live it” and encourage repeated experiences within the country. VisitScotland also runs TV advertisements promoting the pass across Scotland and the North of England for a week’s time each year in August. The advert reaches approximately 5.9 million potential visitors and features a range of activities including surfing, dolphin watching but focuses mainly on mountain biking.

7stanes

7stanes is a brand used to describe a series of mountain bike centres in the forests across the South of Scotland and is one of the key mountain biking attractions within the country. It was first developed in 2001 and attracts 400,000 visitors that generate an estimated £9.3m of expenditure within the South of Scotland. Please see Appendix #9 for a map of the 7stanes. The 7stanes is also based on a Private Public Partnership. The list of these partners is stated below (Forestry Commission Scotland, 2009).

- Scottish Enterprise (SE)
- Scottish Natural Heritage
- Dumfries and Galloway Council
- Scottish Borders Council
- Solway Heritage
- Scottish Power
- VistScotland
- NHS
- European funding

By using this business model both the private and public sector are able to pool the best of their resources in order to establish quality standards and facilities which enables Scotland to compete more aggressively.

Competitive Positioning

The development of the 7stanes project has helped position Scotland as a leader within the mountain bike industry. The project is currently in the last two phases of completion but has already been internationally recognized for its quality trails and it was also mentioned as a success story for adventure tourism with UKTS statistics. It has also stimulated economic activity, as well as product development and collaboration with the private sector. The economic benefit of this development is £2.99 million for Southern Scotland and £3.56 million for Scotland as a whole. This project also gives Scotland a competitive advantage within the mountain bike industry for the reason that it caters to the skill levels of all riders and provides Scotland the opportunity to host larger scale events that receive high levels of promotion internationally.

Brand and Promotion

7stanes has established a strong brand within the mountain bike industry and even more so after being named as one of the best places in the world for riding by the IMBA. The 7stanes brand assures quality, diversity, and an unforgettable riding experience for each one of the centres. The developers of the project knew that branding was a key success factor so building a solid brand based on quality and uniqueness was crucial. In fact, in addition to developing the physical trails, the first two phases of the project focused heavily on marketing, PR, business development and related infrastructure developments (Forestry Commission, 2009). Furthermore, the trails were promoted through web based marketing, popular riding magazines, as well as by being the host to internationally acclaimed festivals that would expose the quality of the trails on an international level.

Moab Utah

Moab is a city located in Eastern Utah in the Western United States. It was once considered to be a booming mining town but when this economic resource ran dry the city then looked into its other natural resources to help put it back on the map. Specifically, Moab's geographical landscape is made up of red sandstone canyons, mesas, and slickrock that have made the area famous and perfect for providing riders with diversity in trails.

The tourism sector within Moab has boomed since the early 1960. Today it is considered the gateway to the United States most famous national parks and landmarks, and has successfully positioned itself as an outdoor adventure destination. Some of the additional outdoor recreational activities that Moab has to offer consist of river rafting excursions, four-wheeling tours, horseback riding retreats, mountain walks, and as well as rock-climbing. Mountain Biking however is considered to be the most popular within the area. Specifically, according to research, mountain biking made up 12% of motivators for visiting the area (History to go: Utah, 2009).

Mountain Biking Experiences

Moab offers riders 16 trails to choose from that are diverse in regards to terrain, length and difficulty. The most famous of these trails is Slickrock Bike Trail. This trail alone can be credited as the route for putting Moab on the world map due to the high technical riding that it offers. Specifically, famous riders have described the course as being the ultimate mountain biking experience and one that must be tested out by every serious rider. Some of the mountain bike tourism experiences that Moab has to offer will now be described in detail below.

Technical Rides

There are many trails that cater towards technical riders within Moab. Specifically, Slick Rock is a good introduction of what this area has to offer with the terrain's rock formation providing excellent traction. Magpie Adventures and Nichols Expeditions also provide technical riding tours on the world famous White Rim Trail in Canyonlands National Park (Mountain Biking Moab Utah, 2009).

Community Trail Rides

Utah offers three main community trail rides within the state that provides the experience of riding in back country trails that offer 360 degree views of spectacular landmarks and are rich in cultural history. These consist of: Fisher Tower Trail, Gooseberry Mesa Trail, and the Historic Union Pacific Rail Trail (Utah state national recreational trails, 2009).

Mountain Bike Instructional Camps

Moab provides instructional camps for riders of all skill levels in order to help riders improve their riding abilities, knowledge, and confidence. The most popular of these consist of Singletrack Ranch Mountain Bike Training Camp, Dream Ride skills camps and clinics as well as Camp Xtrem Adventure race training camp (Mountain Biking Moab Utah, 2009).

Festivals

Moab has further strengthened its reputation within the mountain biking industry through the development of festivals and events. These consist of the Utah State Open Championship, San Rafael Swell Mountain Bike Festival, the Annual Moab Ho-Down Mountain Bike Festival, and the 24 Hours of Moab Mountain Bike Race. See Appendix #1 for details on the Moab festivals.

Competitive Advantage

Moab is currently in the development stage within the mountain biking industry life cycle and has successfully positioned itself as a riding destination that caters to all skill levels. One of the greatest competitive advantages that Moab has is the unique and diverse riding that its terrain offers. Specifically, this area is considered as being a national wonder with its dramatic landscapes, as well as for its diversity in national parks. The fact that Moab is also seen as a destination that is suitable for both family and single riders also provides it with a competitive advantage in reaching a wider target market. Please see Appendix #11 for a perceptual map of Moab Utah that has been developed by strategic marketing and research Inc.

Brand and Promotion

Moab has developed a brand for being a unique and beautiful destination for mountain biking. When looking at various blogging sites it is clear to see that serious riders view the area as high in quality, diverse in difficulty, breathtaking in scenery and rich in hospitality. The Utah Office of Tourism further builds this brand by promoting the area primarily through mediums such as the internet and magazine advertisements. Also, through the use of their main website DiscoverMoab.com the area is advertised as being one of the greatest destinations for mountain biking in the planet. There are also several promotional videos contained on the site that use tag lines such as, "Welcome to the greatest mountain biking on the planet", "Cool down and revive your spirit", and "explore and re-discover your need for adventure". However, despite this it is clear to see that one of the areas that Moab is currently lacking in consists of its ability to provide riders with a logo that identifies mountain biking within the area.

DiscoverMoab.com is a user friendly website that provides more information about what riders should expect when compared to the Scotland Jurisdiction. Specifically, it contains greater information regarding trail difficulty, length, elevations, seasons and directions. However, one key source of information that the site is lacking is the details about mountain biking festivals and events. Information regarding how the Tourism Council of Utah promotes mountain biking both domestically and internationally was neither accessible nor available via the internet. However as stated before some of the larger festivals such as The Annual Moab Ho-Down Mountain Bike Festival and 24 Hours of Moab Mountain Bike Race have received print media in popular mountain biking magazines within North America and have attracted riders from around the world.

Switzerland

Switzerland Tourism is the national marketing and sales organization for Switzerland. This organization provides visitors with quality information and works in close collaboration with tourism partners and suppliers at home and their subsidiaries abroad. It is considered as being a private corporation that is comprised of 13 board members who represent the tourism sector, businesses and the government. This organization has built a strong reputation for Switzerland as being a highly sought after mountain biking travel destination. Specifically, the main method in which information is transferred to travelers is through mountainbikeland.com (Swissinfo, 2009).

The quality of this website is incredible when comparing it to other leading jurisdictions. It goes over and above providing riders with information on how to plan and make the most of their vacation. The next section of this report will be dedicated in describing some of the elements that sets the website apart from others, the mountain biking experiences that Switzerland offers, how it brands and competitively positions itself, and lastly what promotional tools it uses.

Mountainbikeland.ch

This ecommerce website contains 14 categories of relevant information for those interested in mountain biking in the country. These consist of the following: Routes, Travel reports, Places, Rail, Bus, Boat, Bike rentals, Bike service, Accommodation, Bookable offers, Places of interest, Events, Guides and Maps, and lastly Feedback. Although other leading jurisdictions contain similar categories Switzerland sets itself apart from its competitors through the development of system which allow it to cater to the needs and wants of each individual user. Specifically, within each category users can customize their trip by selecting their desired destination, grade of difficulty in routes, type of accommodations preferred, popular events, as well as download mountain biking maps and guides that are translated in German, English or French. Furthermore, one of the biggest factors that separate this site apart from others is the interactive map that allows users to locate their desired destination through a simple search engine that contains GPS coordinates (Switzerland mobility, 2009).

Skill Parks and Community Trail Rides

Switzerland has developed 11 skill parks in the country to provide services for those individuals looking to enhance their free riding skills. The country also provides both paved and unpaved trails for community members to partake in mountain bike recreation. Two of the most popular single track trails consist of Crans-Montana Mountain Bike Trail and Saint-Luc.

Festivals

Switzerland is the host to many popular events and festivals that have built its reputation as a great mountain biking destination. Each event and festival that the country is host to can be found within the MySwitzerland.com website and are organized in terms of when in the year they are held. Three of the highly promoted mountain biking events listed consist of: Mountain Bike Duathlon, Aletsch Bike Marathon, and lastly the Nissan UCI Mountain Bike World Cup Competition Champéry. The event descriptions placed on the site are very brief and researching additional resources for information also proved to be difficult.

Brand and Competitive Positioning

For the past 90 years Switzerland Tourism has been promoting the country as a holiday, travel, and conference destination at home and abroad. Specifically, it seeks to create a brand that stands for authenticity, sustainability and modernity. In terms of mountain biking, Switzerland is branded as a highly sought after, world class riding destination. Furthermore, it is currently in the growth stage of the industry life cycle for the reason that it continues to be globally recognized for its highly developed infrastructure in riding. Switzerland Tourism uses the slogan “Switzerland Get Natural” to brand itself for outdoor recreation and environmental conservation. This slogan fits in line perfectly with how Switzerland is promoting itself as a mountain bike destination. Specifically, one of the main tag lines that it uses consists of: “Biking at its beautiful best and off on a conquest”. Furthermore, Switzerland is also branding itself as a mountain bike destination that is suitable for riders of all skill levels and perfect for both family and single travelers.

There are several factors that give Switzerland a competitive advantage over competing jurisdictions. Their highly developed trail infrastructure and detailed trip planning information sets it apart tremendously. The fact that the country has developed a global reputation for providing world class riding in the unique scenery of the Swiss Alps also sets it apart from rivals. Alpine Bike the first national mountain-bike route which leads from the Engadine valley to the Rhone is also another major competitive advantage that the country holds. Specifically, this route is considered to be the world’s longest routes and one of the toughest for riding as it contains 666 challenging kilometres across the Alps. This route alone has dramatically increased mountain bike tourism within the country and figures are expected to continue to grow in the coming years (MySwitzerland, 2009).

Promotion

The four main marketing instruments that Tourism Switzerland uses to promote mountain biking in the country consist of: e-marketing, traditional promotional activities, media work as well as collaboration with tour operators. Furthermore, Switzerland Tourism is investing more in e-marketing and media work efforts and less in key account management. One of the main factors that are contributing to this is the fact that e-marketing is more efficient and effective as a study conducted in 2008 indicated that the number of visitors to the MySwitzerland.com rose an impressive 4 million to 17.6 million. Media work collaboration also enhances the level of promotion for the country for the reason that it has lead to 1, 340 print productions and 54 partner websites. Furthermore, as stated earlier large festivals such as the Nissan UCI Mountain Bike World Cup Competition Champéry, create strong international promotion for Switzerland as a mountain biking destination.

Oregon

The Oregon Tourism Commission along with a variety of smaller organizations such as the South Oregon Mountain Bike Association is devoted to growing the sport of mountain biking within the state. Furthermore, the Central Oregon Trail Alliance is a non for profit volunteer organization that works in conjunction with land managers to build and maintain trails throughout Central Oregon. Due to the high level of dedication of these organizations to grow the sport of mountain biking in a sustainable manner Oregon is now considered a rising star within the industry. Specifically, Oregon is home to more than 72 trails suitable for riders of all skill levels and is also the host to events and festivals that are helping launch it as a popular mountain bike destination.

Mountain Bike Resorts

Oregon contains several resorts that cater specifically to mountain bikers. For instance, Seventh Mountain Resort is dedicated to helping preserve and enhance mountain biking in Central Oregon. The Central Oregon Trail Alliance is an organization that is dedicated to ensuring the stewardship of sustainable, multiple-use trails and to preserving access for mountain bikers through advocacy, education, and promoting responsible trail use. Another popular mountain bike resort consists of Mt. Hood's premier mountain bike resort (Seventh Mountain Resort, 2009).

Skill Parks and Community Trail Rides

Oregon is home to several mountain bike skill parks. These parks are growing large in demand and an investment towards developing them in the future is gaining momentum. Oregon also promotes mountain biking to community members by investing in a variety of parks that cater to all skill levels.

Festivals and Events

Oregon is the host to both large and grassroots mountain bike festivals and events. The most popular and highly promoted consist of Mountain Bike Oregon and the Spring Thaw Mountain Bike Festival. Both of these are described in Appendix #1.

Brand and Competitive Positioning

Oregon brands itself as being a Mecca for mountain bikers. It states its spectacular scenery combined with its location at the edge of the Deschutes National Forest is what separates it from others. Furthermore, mountain bikers perceive the area as being arguably some of the best single and double trail riding in the country. It is also clear to see that Oregon is currently competitively positioned within the growth stage in the mountain biking industry. In fact, the Oregon Tourism Commission has stated that they will be further investing in building and enhancing trails for riders. This can also be seen through the growth each year in both the grassroots and large scale festivals. (Cycling in Oregon, 2009).

Promotion

The level of promotion for Oregon as a mountain biking destination is weak when comparing it to other leading jurisdictions. Looking at the Oregon Tourism Commission website it is clear to see that there are no logos or slogans that promote mountain biking in the area. Specifically, there is only a small section that has been dedicated towards informing users about mountain biking. This indicates that the level of partnerships between the commission and bike associations within the state is not as strong as it could be.

Best Models Key Success Factor Analysis

In order to gain a thorough understanding of the elements that contribute to making a destination a success within the mountain biking industry, an analysis of key success factors was conducted. This tool provides the ability to look at the major strengths, weaknesses, opportunities and threats that impact jurisdiction seeking to be world leaders in mountain bike tourism.

A key element that separates the leaders from the followers is the level of commitment towards setting goals and SMART objectives (Specific Measurable, Achievable, Realistic and Timed) and the level of dedication towards achieving them. By establishing goals and objectives a country gains stronger focus and direction towards achieving future growth. An example of this can be seen through the exponential growth that Scotland has experienced within the last few years. Specifically, Scotland mountain bike tourism has set the goal to grow the industry by 50% by the year 2015 and continuously measures and makes necessary changes to this goal when needed. **Furthermore, another key tool that is needed in order to become a strong player within the industry is to establish a strong international brand and image.** Doing this allows riders to associate important factors such as quality and novelty when choosing a riding destination.

Having government support in working towards establishing partnerships between mountain bike associations is also a key to success. Particularly, the greater a government's commitment, the stronger the level of investment is towards improving important factors. Some of these factors consist of trail developments for both beginner and expert riders, building of riding centres, hosting festivals and events as well as greater marketing and promotion for an area. Government dedication can be attributed to the great success that both Scotland and Switzerland have had when comparing it to both Moab and Oregon who face less government support.

Furthermore, partnerships between the private and public sector also strengthen an areas' ability to position itself as a leader within the industry. Specifically, they allow each party to invest their best resources in order to compete more aggressively. This being said it is extremely important to make the government aware of how investing in the industry brings significant and long term benefits to an area.

It is also clear to see that one of the distinguishing factors that separate the strong from the weak is based on the type of festivals and events that a country hosts. Specifically, organizing festivals that are diverse allows a country to reach a greater target market. For instance, Switzerland provides events throughout the year that cater to families, singles, extreme and beginner riders, whereas Moab narrows its target market by hosting events that are geared mainly towards the advanced riders. In addition, countries who are the host to larger scale events enhance the level of publicity they receive. This can be seen in both Scotland and Switzerland for being pit stops for the Nissan UCI Mountain Bike World Cup Competition.

Having the ability to effectively communicate and inform riders about the mountain biking that an area has to offer is also vital. Particularly, the main medium that individuals use to find information is via the internet. Therefore, providing a website that is highly informative, user friendly, as well as considered unique and exciting is vital. When comparing the jurisdictions researched it is clear to see that Switzerland is the most advanced in providing detail information about trail infrastructure and the most convenient with its ability to allow users to customize their trip planning. Another major asset is to also translate the information into the main languages spoken by travelers.

After looking at the factors that have the potential to leverage a country to achieve success or prevent growth if not conducted, it is important to also take a look at the several opportunities and threats. One of the biggest opportunities that growing countries can do in order to enhance their position within the industry is to increase their level of promotion by hosting large scale events and by developing stronger e-marketing presence. Also, it is important to be aware of the fact that there is an increasing level of competition from other outdoor adventure sports. Specifically, rock climbing and cycling are growing strong in popularity. Being aware of this can allow jurisdictions to counter this threat by developing possible partnerships with tour operators that create bundle packages for sports that are compatible. Furthermore, being aware of the fact that the current economic crisis has had an impact on the level of mountain bike tourism can also allow jurisdictions to develop new mountain bike experiences that are conveniently affordable for travelers.

“Mountain biking helps people become environmentalists. A mountain bike is a vehicle to appreciate the backcountry.”
- Ned Overend

Section 3: Situation Analysis

British Columbia Mountain Bike Tourism Assessment

An analysis that looks specifically at the performance of the mountain biking industry in British Columbia has been conducted. Specifically it compares the discussed key success to the province's performance. In order to thoroughly do this a SWOT analysis was conducted. Please see Appendix #12 for details regarding the SWOT.

Introduction

There are many factors that have contributed to the overall success that British Columbia has achieved as a world leader within the mountain bike industry. Specifically, BC has built a strong brand that is based on quality riding in one of the most beautiful destinations in the world. Globally the province is known for being the birthplace for free riding and promotes the area through distinguishing slogans such as "Super, Natural BC". This brand has been further strengthened by local parks such as Whistler and Sun Peaks for being recognized by BIKE magazine as the top five parks for riding in North America. Also, the fact that the IMBA awarded BC with a grade A in their annual mountain bike access report card in 2005 also provides quality assurance for the brand. However, one important element to note is that, although the province does indeed provide a diversity of experiences for riders of all skill levels, there is a perception that the area is only geared for extreme riding. This then limits the ability to attract a greater target market of riders such as those individuals in the beginner and family market.

There are many organizations such as Tourism British Columbia, Western Canada Mountain Bike Tourism Association (MBTA) and Bike Parks BC which have established specific goals and objectives to further grow the sport within the province. However, there does continue to be a lack of a vision between industry players and government officials. This then results in fewer investments dedicated towards marketing and promotion, trail improvements as well as the development of synchronized systems that work towards enhancing quality service that help build the brand. Also, a lack of understanding at the municipal regional level of the importance of growing the sport is negatively impacting BC's ability to compete at its full potential. Specifically, there is a need for authorization of mountain bike trails at the community level and uncertainties towards authorization of trails that caused the IMBA to down grade BC's rating from an A to a C in 2006.

Due to the rising level of competition within the industry, it is extremely crucial to develop key competitive advantages that will distinguish one riding destination from another. One of the main methods that leading countries do this is by incorporating their natural landscape as well as their culture and heritage within their promotional materials. So far, BC has done an excellent job in promoting its natural landscape that separates it from other jurisdictions. Furthermore, BC is using effective marketing mediums to promote the area. These consist of consumer shows, as well as print vertical and on-line marketing. However, a major factor that can help launch the province into further growth is by creating stronger e-marketing presence and developing a thorough e-commerce website that can be comparable to the quality of Switzerland's site. Specifically, there needs to be enhancements made to the detail of information regarding trail infrastructure and provide greater customization for trip planning.

Another area of opportunity that can further leverage BC as a top competitor in the industry is by hosting larger scale events. This is one of the key strategies that leading countries such as Switzerland and Scotland are doing to enhance their global image. Also, developing partnerships and marketing tactics that create a high level of exposure to these events is vital. Lastly, it is also important to keep in mind the fact that the current economic crisis is affecting the industry. Therefore, developing and offering all travelers mountain biking experiences that are affordable without compromising quality is essential when developing a strategy that is suitable to current environmental conditions.

BC Mountain Biking Assessment

Strengths of BC Mountain Biking

BC is acknowledged as a world class mountain biking destination (based on the uniqueness and difficulty of its trails, pristine wilderness, scenery, and tourism infrastructure). BC has an incredible trail infrastructure shaped by the diverse geography. BC's "North Shore" is an iconic brand among mountain bikers, with most acknowledging that the North Shore is the birthplace of freeriding. The Whistler Bike Park is widely recognized as a world leader in mountain bike parks. Most mountain biking videos and magazines contain BC content, which generates a high level of interest for the province. BC has many grass roots clubs and organizations with a goal of building world-class trails in their communities, and making mountain bike tourism an important part of their communities.

The rapid growth of the sport has generated interest in destination mountain bike tourism throughout BC, not just urban centres or established destinations, as demonstrated by communities such as Rossland (Seven Summits Trail – 2007 Trail of the Year by Bike Magazine), Burns Lake (community integrated mountain bike trail system), or the Shuswap region (over 300 kilometres of proposed trail throughout the Shuswap watershed). The supreme Canadian hospitality, rescue services and health care system, access to an educated population, liberal attitudes and the English speaking region are all selling features to establish BC as the mountain biking epicentre. In addition, provincial government has shown an openness to allow mountain biking on Crown Land due to its low impact on the environment.

There are many other examples including the eight pilot communities identified by the Ministry of Tourism, Culture and the Arts for implementing its new policy for authorized mountain bike trails on Crown land. Communities and industry are demonstrating that they are progressive, active, and committed to producing growth in mountain bike tourism.

BC is home to numerous trail networks that have all been developed by riders for riders who have all added to an active, progressive, supportive, and committed riding community in a safe first world country. Trails in BC were built by passionate pioneers of the sport of mountain biking. These same pioneers and their descendants are here to share their enthusiasm with visitors. The province has a diverse accommodation selection as well as mixture of locations that allows for all mountain riding, cross country and freeriding. Resort Bike Parks are a major drawing feature to the success of BC mountain biking. As the province's brand Supernatural BC suggests there is a diverse geography for riders to choose from when selecting BC to ride. Crown land is available for additional trail development to enhance BC's repertoire of mountain biking options. The length of the riding season and the desired climate for the sport is one of the many strengths that BC has to offer.

Core Competencies

- Diversity in terrain
- Length of season and climate
- Whistler Bike Park
- Seen as an innovator in trail design

Weaknesses of BC Mountain Biking

The most pressing need is for authorization of mountain biking trails at the community level. The industry is diverse and fragmented. Lack of authorized trails limits marketing and impacts liability insurance rates for operators. The BC Ministry of Tourism, Culture and the Arts has a process underway which will lead to authorization for some mountain bike trails in the near future.

At this point in time BC is lacking in numerous areas such as marketing, funding to build trails, mechanisms that tie those that benefit to the management of the mountain bike trails, vision, understanding, research, and advocacy. Currently, there are no systems for local or regional infrastructure investment, and administration of such a vast trail network is no easy task. The existing structure of tenure system makes it difficult for operators to control. BC has attained a global image of being "extreme" with a climate that is hard to predict. The road access to the trails is less than first class as well.

Stakeholders in the industry are too diverse to work with and consultations with the First Nations may slow down the progress to grow the sector. BC has crossed paths with those who are protecting their assets and are in the "Not in my Backyard" mind frame.

Opportunities for BC Mountain Biking

BC has the opportunity to be recognized as the world leader in mountain bike tourism and become the world's ultimate mountain biking destination, but as a province it needs to capitalize on its name recognition and resource potential. The money generated by the mountain biking industry can be re-invested into the landscape to build new trails and ensure that existing trails are sustainable. As trail authorization issues are resolved and community trails can be marketed, a coordinated approach will be needed to reach a large and diverse market, (e.g. Canada, US, and the UK).

Short Term

- Partner with established alliances (Bike Parks BC Resorts)
- Brand BC as the best mountain bike destination
- Co-ordinate with Tourism BC and all stakeholders in mountain bike tourism
- Focus on stimulating travel by BC residents – Play In Your Own Backyard
- Use BC riders as spokespeople (riders)
- Cross Promote with other proven tourism sectors (beer, wine, ski, sports tourism, film making)
- Need BC government to implement BC Recreation Trails strategy
- Influence future product development
- Promote mountain biking as a form of experiential/adventure tourism

Long Term:

- Build strategic alliances to package mountain experiences with air and hotel
- Establish international marketing efforts (Australia)

Success = Great Trails + Bike
Infrastructure + Service
/Hospitality

Threats of BC Mountain Biking

While BC's mountain biking industry has ample possibilities for a soaring success, there are a small number of hurdles for the providence to overcome. Access to authorized trails and ongoing trail maintenance costs are the largest challenges to developing and growing the mountain bike sector in BC, along with issues around risk and liability. Road access to trail heads is becoming an increasing problem and there is a growing competition for trail usage between motorized and non-motorized modes of recreational transportation. Different government departments who do not value mountain bike tourism will be less likely to support the growth of the sector.

Competition from well organized and well-resourced mountain biking destinations such as Scotland , Switzerland, France, Germany, Utah, Oregon, Colorado as well as New Zealand pose a threat to BC's market share and stake claim to be the mountain bike destination.

With today's economy in mind, cheaper international competition such as Cuba and Morocco are much more appealing to the consumers and their wallets. Competition from the US is on the rise for dealing with liability, (introduction of inherent risk legislation.) Air access into BC may be further eroded due to recession and Resource based economy in BC poses conflicts with sustainable mountain bike tourism experiences.

Conclusion and Recommendation

From the analysis conducted it is clear to see that BC has the resources to become the Mountain Biking Mecca of the world even though there are some areas that could potentially hold them back from capturing that title. For BC to grow for mountain bikers, their best course of action would be to work in partnership with other dominating mountain bike regions to create an alliance rather than competition. To have a positive exposure overseas would greatly benefit the province.

Driving Forces

Developing the Mountain Bike Tourism Industry in British Columbia will pay dividends in the form of overnight accommodation stimulus, as well as contribution to local the service industry. The MBTA developed a study to analyze the effects of mountain bike tourism on the Sea to Sky region of coastal British Columbia. The study identified some key indicators that further development in this region and others in British Columbia would prove beneficial to the overall tourism industry.

- Percentage of overnight stays continues to increase, when compared to day trips, as the distance from the Lower Mainland increases
 - North Shore – 9% overnight stays
 - Squamish – 21% overnight stays
 - Whistler Valley – 90% overnight stays
 - Whistler Bike Park – 89% overnight stays
- 77% of those surveyed were male and 85% of were between the ages of 19-49
- Of those surveyed, 86% originated from the Greater Vancouver area – the second highest percentage of visitors were from the United States at 5%
- The service industries experienced stimulus through the mountain biking visitors:

	North Shore		Squamish		Whistler Valley	
	Same Day	Overnight	Same Day	Overnight	Same Day	Overnight
Avg. Party Size	2.5	3.2	2.9	3.0	2.8	3.1
Avg. Night Stay	6.3		3.2		4.5	
Avg. Expenditures Per Day Per Person	\$39.12	\$48.32	\$92.09	\$53.94	\$83.79	\$93.48

(Tourism British Columbia, 2008)

The expenditures per person create a multiplier effect within the area's service industry encouraging development and new businesses entering the marketplace. The mountain bike tourism industry shows promising figures identifying an opportunity to motivate industry growth. Understanding the consumer will contribute to the effectiveness of any marketing.¹⁰

¹⁰ Information gathered from document entitled "Mountain Bike Tourism" authored by Tourism Business Essentials dated 2008

The Mountain Bike Tourist

The purpose of the consumer profile is to identify the key market characteristics and ascertain certain qualities that will maximize the efficiency of any marketing initiatives. Consumer characteristics will be placed into three distinct categories: demographics, geographics, and psychographics. The consumer profile will provide insight into the ideal mountain bike tourist and enable a guideline to be constructed to ensure that all marketing efforts are designed to stimulate the senses of the ideal consumer.

Tourism Business Essentials 2008 states that the benefits of mountain biking as a tourism product have been enjoyed to some extent by BC communities for over a decade, since mountain bike-specific trails began to emerge in the 1990s. The benefits are three fold:

1. Economic - One of the most compelling benefits of trails is their ability to provide an economic return to communities by attracting riders from out of town
2. Environmental - Active management and planning of trail systems has led to rehabilitation of natural landscapes and a decrease in unauthorized trail construction and use
3. Social - Engaging the younger generations in biking- related projects and providing opportunities for families to promote and practice a healthy lifestyle

The above benefits are becoming more evident in traveler motivation studies and economic impact research. The same studies have addressed two major misconceptions about the mountain biking sector:

1. Mountain biking is in fact a travel motivator and people will travel to destinations specifically to go mountain biking,
2. Mountain bikers are well educated, prosperous, and the bulk of them are over 30 years of age

It is estimated that over 700,000 Canadians actively participate in cycling and mountain biking on a regular basis. Representing an important part of the tourism market in British Columbia, the mountain bike tourism industry has a substantial opportunity to realize significant growth. Currently, one in every twenty visitors to British Columbia, on an annual basis, comes to enjoy the magnificent product that it has to offer. The province has played host to approximately 6 million visitors from 2006-2007, which represented 30% of the total domestic overnight pleasure travelers. Of the 6 million visitors, it is estimated that mountain bike travelers represent approximately 2%. These numbers identify a potential for significant increase in the market share being realized in British Columbia. Understanding the consumer will improve the probability of successfully making British Columbia a world class destination for mountain bike tourists.

Demographics (Domestic):¹¹

Age:

- 1 in 5 are between 18-25 years of age
- 1 in 4 are between 25-34 years of age
- 1 in 4 are between 35-44 years of age
- Less than 1 in 5 are between 45-54
- 1 in 10 are over the age of 55
- 1 in 52 are over the age of 65

Gender:

- 75.5% of mountain bikers are male

Income:

- More than 1 in 3 mountain bikers have an annual income greater than \$100,000
- Majority of mountain bikers are full-time paid employees

Education:

- Approximately two-thirds of cyclists and mountain bikers have a post-secondary diploma or a University degree

“Until mountain biking came along, the bike scene was ruled by a small elite cadre of people who seemed allergic to enthusiasm.”
-Jacquie Phelan

¹¹ Information on demographics was sourced from Tourism BC activity profile with a focus on recreational cycling and mountain biking, authored by Nicolette Douglas of Nicolette Douglas Consulting | Research dated November 2008

Geographics:¹²

Domestic:

- There are significant populations of mountain bikers in each province
- Higher collectives in British Columbia, Ontario, and Quebec
- Mountain bikers are least likely to live in the Maritimes or prairie provinces such as Alberta or Saskatchewan
- 1 in 7 Canadian Mountain Bikers live in Vancouver, BC
- Over 50% of Canadian Mountain Bikers have been to BC on an overnight pleasure trip

Travelers from the United States:

- Approximately 305,000 mountain biking tourists travelled to British Columbia from the U.S. representing 6% of the pleasure travel population
- Mountain bikers are three time more likely to travel to British Columbia because of its reputation as a world class reputation for mountain biking
- BC has attracted 12.8% of the US mountain biking market
- Significant population of mountain bikers live in the Pacific states: Washington, Oregon, and California
- California is home to approximately one quarter of the US mountain biking market
- 63% of travelers from the US are male
- On a ten point scale, Hawaii was rated as the most favourable destination for mountain biking with a grade of 8.7, while British Columbia received a grade of 7.1, placing it fourth behind Hawaii, Colorado, and California respectively

¹² Information on geographics was sourced from Tourism BC activity profile with a focus on recreational cycling and mountain biking, authored by Nicolette Douglas of Nicolette Douglas Consulting | Research dated November 2008

Psychographics:¹³

Decision Making:

- Mountain bikers will decide their destination with safety as a high priority
- Are image oriented and will seek information regarding a location based on its perceived image
- The area must maintain the following elements to maximize the potential that mountain bikers will choose it:
 - Safe environment
 - Pose no health concerns
 - Convenient access by car
 - Many activities for adults
 - Opportunity to sight see
 - Offer mid-range accommodations or camping

Other Activities:

- Just under 50% of mountain bikers are RVers or Campers
- 2 in 5 are also Alpine Skiers or Hikers
- 3 in 10 are Nordic Skiers
- 3 in 10 travel on self-guided overnight tours and are considered to be history/heritage tourists
- 1 in 4 are anglers
- Will make trips to provincial parks or national parks to camp, hike, or ski
- Mountain bikers are likely to take advantage of available water activities such as swimming, boating, sunbathing, and/or fishing

Information Resources:

- 7 in 10 mountain bikers rely on the internet to provide them with travel information
- 6 in 10 rely on information they have received from friends and relatives
- 5 in 10 use their own past experience to make decisions
- 4 in 10 will utilize maps and Visitor Information Centres
- 3 in 10 rely on official travel guides, travel agents, and newspapers

This analysis leads into development of specifics in terms of a definable target market. In the next section, then marketplace will be broken down into detailed consumer groups complete with demographic, geographic and psychographic profiles. This information will enable the marketing initiatives to represent the ideal consumer.

¹³ Information on psychographics was sourced from Tourism BC activity profile with a focus on recreational cycling and mountain biking, authored by Nicolette Douglas of Nicolette Douglas Consulting | Research dated November 2008

Target Market Validation

In the figure depicted below that the target market can be appropriately paired up with the product available to offer. This figure identifies some basic consumer needs and provides a macro view of how they may compare to experiences common during a mountain biking excursion.

Consumer Needs Match

	User Needs				
	Guided	Day Rides		Multi Day Rides	
	Paid	Group Rides members	Self Guided	Guided	Self Guided
Mountain Bike Experiences					
Bike Resorts (downhill and freeride)					
Skills Parks (local)					
All mountain riding (includes freeride)					
Cross Country Trails					
Community Trails					
Mountain Bike Festivals/Races					
Instructional Camps					
Shuttle Services may apply to one or more categories					

Initial Segmentation Identifiers

Categorize and identify distinguishing characteristics for consumer types:

- Free Riders
- Cross Country
- Leisure Riders

Analysis of mountain bike tourism products:

- Lift Access Mountain Biking
- Instructional Camps
- Technical Rides
- Cross Country Multi-Day Wilderness Rides/Touring
- Mountain Bike Festivals, Events, and Races
- Skills Parks
- Community Rides

Ensure efforts are reflective of the industry's seasonal nature:

- Peak Season | July – August
- Shoulder Season | May - June and September – October
- Off Season | November – April

Identify geological elements that provide British Columbia with a tangible competitive advantage and relate to specific consumer characteristics based:

- Thompson - Okanagan
- Kootenay Rockies
- Cariboo Chilcotin Coast
- Vancouver Island
- Vancouver Coast and Mountains
- Northern BC

Consumer Types:

Free Riders

Demographics:

- Broad age range: 15-55
- Predominantly male

Geographics:

- Locals
- Destination Tourists

Psychographics:

- Niche seekers
- Technically skilled; however, majority self guided
- Searching for unique cultural experience
- Participate for the thrill, for bragging rights, and to be accepted by peers
- Information is acquired through word of mouth, internet searches, and magazine articles

Type Summary:

This consumer group is very image oriented and will only be associated with certain brands. Their participation is socially driven; they love the sport, but utilize it to mingle with friends and meet new people who represent their style and attitude. This group is primarily interested in loose fitting attire and will wear armour to protect them. Although these riders are technically skilled and thrive on pushing their own limitations, they will often be self taught and self guided. Instructional camps can be offered to a sub-category of this group that represents the older and more affluent members. Although this group traditionally spends less on accommodations, they are known to frequent bike shops, restaurants, bars, and anywhere that the local consumer group considers to be the appropriate “scene”. The Free Riders’ *scene* is utilized by the group as a medium to display their style and mingle with other like minded individuals. This presents an opportunity to reach this group in forums outside of traditional mediums.¹⁴

The all mountain/trail-like rider represents a convergence of both freeriding and cross-country and is one of the biggest trends in mountain biking at the moment.

¹⁴ Statistical information derived from “Recreational Cycling and Mountain Biking” authored by Research Resolutions and Consulting Ltd. Dated August 2007

Cross Country

Demographics:

- Greater female representation than Free Riders; however, often participate in couples
- Ages 20-55
- Generally more affluent and willing to pay for quality

Geographics:

- Destination riders, in search of total experience packaged with mountain biking
- Point to point travelers

“Melancholy is incompatible with bicycling.”
-James E. Starrs

Psychographics:

- Greater focus on healthy lifestyle choices; enjoy technical challenges with a greater emphasis on fitness
- Enjoy circle tours in groups for social aspect
- Quality dining and proximity to reputable bike shop and secure bike storage are decision making criteria

Type Summary:

This consumer group is interested in clear structure and measurable expectations. They are more likely to travel longer distances and participate in multi-day rides as they are in search of a packaged experience. This group tends to be more affluent; as a result, they have higher expectations in terms of service quality. They place a greater emphasis on fitness rather than technically challenging terrain. This influences their choice of clothing in that they are more likely to have spandex riding uniforms and little to no protective armour. Organization is paramount as Cross Country riders appreciate proper maps, signage, and easily identifiable trail classification. They will factor surrounding environment into their decision making in terms of dining establishment and access to quality accommodations. Bed and Breakfasts are popular with this group as they are often travelling as a couple and enjoy the quiet atmosphere and convenient breakfast. The internet and magazines are effective mediums for attracting this group as they are in search of structured products and riding is commonly a part of their daily lives.¹⁵

¹⁵ Statistical information derived from “Recreational Cycling and Mountain Biking” authored by Research Resolutions and Consulting Ltd. Dated August 2007

Leisure Riders

Demographics:

- Females and males between the ages of 15-50
- Affluent and well educated
- Families with parents between 40-60 years of age with children old enough to participate

Geographics:

- Primarily local riders willing to make trips that are within a day's drive

Psychographics:

- Routine riders with a high emphasis on technical skill
- Riding is an everyday part of life within the household
- Often will ride the same location due to convenient proximity to household

Type Summary:

This group does the majority of their riding using their home as their base of operations. They are frequenters of local bike shops and often have a group of friends interested in similar products. As a result, much of their product decisions are made based on recommendations. This group will make use of ride parks and bike resorts as long as they are close to their homes.¹⁶

“I have always struggled to achieve excellence. One thing that cycling has taught me is that if you can achieve something without a struggle it's not going to be satisfying.”
-Greg LeMond

¹⁶ Statistical information derived from “Recreational Cycling and Mountain Biking” authored by Research Resolutions and Consulting Ltd. Dated August 2007

Consumer Traits for Mountain Bike Tourism Experiences

Destination Mountain Bike Resorts | Lift Access, Bike Parks, & Leisure Trails

- Males 15-50 broad age range with focus on 15-35 as strongest segment
- Affluent and educated | 82% male
- Vast majority are under 30
- Families with 40-60 years old parents with kids can have different experiences together
- Emerging sector are younger males for free riding and female getaways for lift access, camps
- Majority are locals; regional residents and close in destination tourists | within a day's drive
- BC/Alberta market for rubber tire
- Short haul air | Pacific Northwest
- Long haul air | Ontario, Eastern US and Germany/UK

Values:

Resorts attract riders because of their mountain bike image, as well as customers who want to visit the resort and try an activity

- They want a gravity fed lift access experience with a variety of trails
- Want an organized network
- Want a learning experience
- Want safe network
- Want a local experience | authentic, meet people, ride hard, and socialize
- Want to boast about vertical drop per day

Instructional Camps

- Younger males and women in groups | late 20's to late 40's
- Affluent Free Riders
- Children
- Competitive riders
- Disabled riders

Values:

- Looking for education and bonding
- Diversity of experience | novice, intermediate, and expert
- Strong local and regional focus and appeal to visitors to mountain bike resort customers

Day Rides | Free Riders, Cross Country, and Leisure Riders

- Free riders younger, single, and less affluent
- Leisure Mountain Bikers | families of all types and affluent educated older 50 plus; commuting aspect for professionals
- Cross Country | groups of men and women for cross country; 30-50
- Includes BC residents, short haul, and long haul
- Couples and families prefer more day rides | rail trails and community trails

Cross Country Wilderness Multi Day Rides

- Cross Country | baby boomers, 35-55 male and emerging for female
- Regional, short haul, long haul, and international
- Sports Clubs and Mountain Biking Clubs

Values:

- Looking for a wilderness experience
- Guided tours and self guided
- Like to travel distance | usually 50km in one ride
- Key is to manage expectations and unique wilderness experiences

Mountain Bike Festivals, Events, and Races

- Hardcore, younger males for races with females as emerging
- Festivals attract a broader target depending on the festival events (Cross Country vs. Endurance vs. Downhill vs. Fun)
- Need to attract regional residents to make festivals a success | Ride with Locals
- Tie mountain bike festivals into sports tourism | teams
- Can attract regional and short haul and long haul
- Sports Tourist
- Mixed gender

Values:

- People who watch want a social experience
- Looking for other entertainment | music, food, demos
- Want to be part of a spectacle, mountain bike culture, and part of a social group

Skills Parks

- Local kids 8-20
- Also attracts skills assessment for guides
- 80% male with an opportunity for younger females
- Beginner to advanced
- Geographics are dependent on location and what is offered but typically local users

Values:

- Local users want to improve skills and visitors want to connect with local riders
- Parents want a safe environment
- Progressive learning
- Youth social networking

Community Trails

- All ages
- Locals and tourists
- Families with kids and animals
- Couples | baby boomers
- Community groups
- Tourists who are visiting the area for another reason
- Visiting Friends and relatives market
- Commuters
- Great experience for novice mountain bike riders

Values:

- They act as a gateway to mountain biking linking urban with rural mountain biking
- Waterfront access, lakes, rivers, etc.
- Social time
- Light exercise
- Family and friend bonding
- Self guided
- Sightseeing and local points of interest
- Soft adventure
- Wide trails, gentle grades, compacted and easily accessible
- Safe trails
- History
- Close to services, bike shops, food, and drink
- Links to other recreation opportunities
- Easily achievable experience
- Multiple entry points
- Three season access
- Objectives and Strategies

“You know right away in mountain biking if you’re on or not.”
-Alison Sydor

Objectives & Strategies

Introduction

The following section outlines both objectives and strategies required to accomplish the objectives. The objectives are categorized as:

1. Financial - relating to the need for capital and operating funds to execute this plan;
2. Governance and Organization - relating to the manner in which the plan will be administered and executed;
3. Integrated Marketing Communication - relating to the consolidated plan of paid media, earned media, internet, and promotions to create awareness, trial, and repeat visitation;
4. Packaging - relating to the means by which a diverse set of mountain bike experiences can be presented to target consumers;
5. Branding - relating to the positioning of the BC Mountain Bike tourism sector;
6. Services - relating to the education of stakeholders and consumers and the services of both to encourage loyalty in the sector;
7. Product Development - relating to the inventory of mountain bike experiences and understanding consumer motivations to better develop the tourism sector.

“The secret to mountain biking is pretty simple. The slower you go the more likely it is you'll crash.”

Julie Furtado

Financial Objectives

1. To generate incremental tourism revenues including;
 - a. Community economic benefits such as hotel rooms; food and beverage; retail services;
 - b. Direct economic benefits for the mountain biking industry for commercial operators; resorts and mountain bike retail and rental and guided trips and tour transportation
2. To set an annual marketing budget of \$200,000 - \$250,000 and to source an incremental budget beyond the current \$94k from resort bike parks and Experiences BC
3. To develop a sustainable fund for trail maintenance that supports the work of trail builders. A sustainable revenue stream for clubs for trail building will greatly facilitate the execution of the marketing plan
4. To determine an ongoing evaluation of the marketing plan strategies and tactics through research and consumer feedback to provide key performance data for stakeholders and sponsors and consumers

Financial Strategies

1. *Economic Impact Measurement*

- The mountain bike tourism industry needs to establish benchmarks for measuring the incremental tourism revenues for the industry. It needs to set key performance indicators for each mountain bike tourism experience and then conduct market research to determine economic impact of each area
- This can be accomplished through alliances with educational institutions that have a primary focus on tourism research such as Thompson Rivers University, Okanagan College, Capilano University, Camosun College, or the Ministry of Tourism Culture and the Arts

2. *Annual Marketing Plan Funding Mechanisms*

- Seed Money for Annual Marketing plan - Seek a tiered buy-in structure from following:
- Source seed money of \$200,000 - \$250,000 per annum through marketing levies such as:
 - \$50,000 from Tourism BC – Experiences BC
 - Mountain Bike Resorts – aim for \$50,000 - \$10,000 per resort
 - RDMO's – aim for \$50,000 from 5 RDMO's - \$10,000 per RDMO
 - DMO's – aim for \$50,000 from 10 key DMO's - \$5,000 per DMO
 - Operators – create a reasonable tiered membership fee based on revenues. Set a base buy-in level and an augmented level where those who can afford the opportunity shall pay to play. Look to other sectors such as Nordic for membership fee examples. Consider cash and "in-kind" donation for smaller players
 - Corporate sponsorships – seek industry support from manufacturers of mountain bikes and other related retail stakeholders on the basis of seeking corporate social responsibility including banks, insurance companies, health related organizations

- Leverage paid marketing communications or reduce expenses using tactics such as:
 - Sell ads in all paid media be it print or internet
 - Create sponsorships of paid media opportunities
 - Create sponsorships for earned media
 - Utilize sales channels of bike retailers; accommodators; bike manufacturers to create leveraged promotions
 - Derive revenues from sale of online packages

3. Annual Trail Maintenance Plan Funding Mechanisms

In order for trail clubs and volunteers to continue to design, build and maintain trails, a source of revenues must be found to assist these stakeholders. Possible tactics include:

- Regional Districts appropriations – utilize a strategy similar to Squamish Lillooet Regional District whereby residents pay a small levy which goes directly into trail maintenance
- Introduce a Trail Pass for users on appropriate trails on an honour system
- Mountain Bike events and commercial operators tax
- Create incentives for private landowners (tax credits) to authorize mountain bike trails

4. Ongoing Evaluation of Marketing Plan

Create an annual consumer research survey that measures key performance indicators as determined by the stakeholders and sponsors.

Governance and Organizational Objectives

The Western Canada Mountain Bike Tourism Association (MBTA), referred to as the “executive team”, will coordinate and manage the implementation of the Mountain Bike Tourism Sector Marketing Plan as developed and supported through the Experiences BC program on behalf of industry partners and stakeholders.

Terms of reference for the executive team will include the following:

Goals

1. Grow the economic contribution of mountain bike tourism to the provincial economy
2. Provide direction for the implementation of the mountain bike tourism sector strategy
3. Establish BC as a leader in mountain biking tourism
4. Evolve into a self-sustaining organization representing the interests of all mountain bike tourism stakeholders in the province of British Columbia.

Specific Objectives

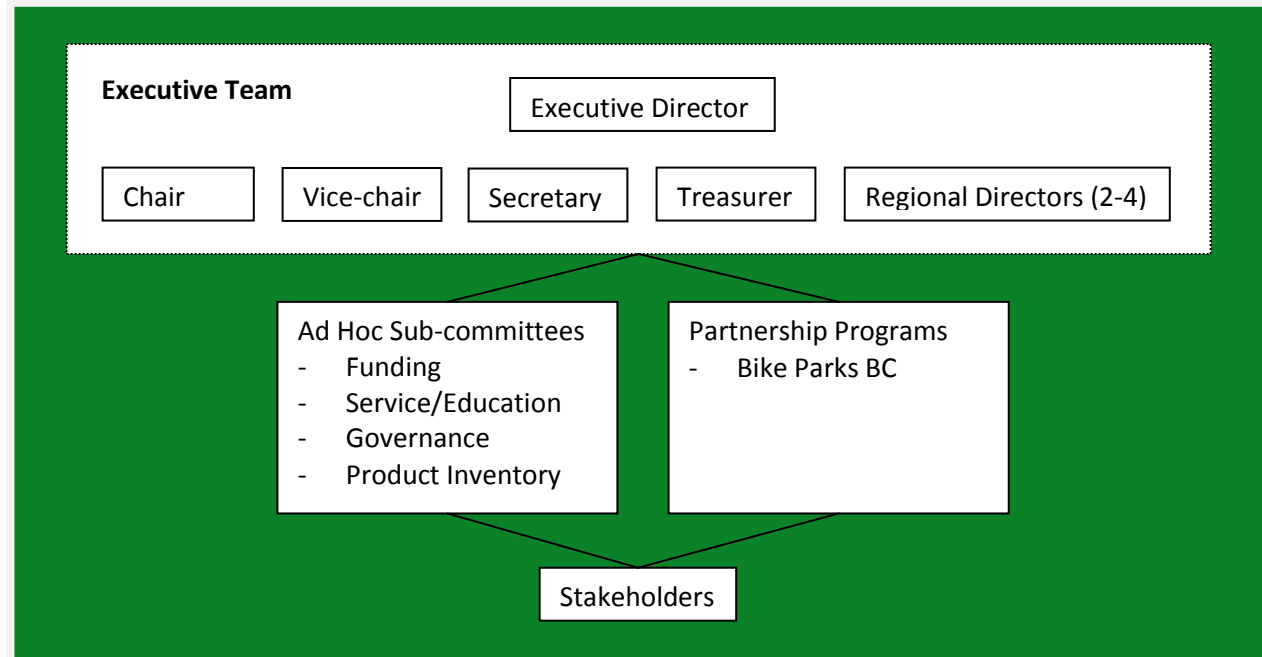
1. Create a board that is representative of all stakeholders and geographically balanced
2. Need to ensure the organization is responsible and funded for administering the plan
3. Establish a proper governance model to build a strong cohesive industry
4. Establish collaborative execution of the marketing strategies
5. Create official mountain bike communities of BC
6. Need to engage municipalities and regional governments
7. Need to engage all identified stakeholders
8. Inform the market place of the diverse mountain biking experiences available in BC and where to find them
9. Attract visitors to BC for the specific purpose of mountain biking
10. Increase the length of stay for mountain biking visitors
11. Increase the number of mountain biking visitors who stay in paid accommodation
12. Increase the number of visitors who participate in mountain biking activities
13. Increase the number of repeat visits by those who participate in mountain biking activities
14. Increase the number of annual visits to resorts and communities offering mountain biking
15. Broaden the demographics of visitors who participate in mountain biking activities (currently most are 25-34 year old males) Establish a provincial leader whose mandate is to centralize information, mobilize others, and turn existing opportunities into successes. This would be best accomplished by a governing body which consists of membership from local government, provincial government, special interest groups (clubs) and market sectors (operators, businesses).

Governance & Organizational Strategies

1. MBTA to assume lead role and be funded to administer the execution and ongoing development of the marketing plan
 - a. Need an appointed board representing stakeholders
 - b. Need to review constitution to ensure it reflects new mandate and will address the practices, systems, ethics, laws and norms which the governance structure employs
 - c. Need contracted coordinators chosen
 - d. Need to establish board governance policy using similar policy from a DMO or leading not for profit organization
 - e. Need operating procedures
 - f. Need operating budget
 - g. Need to be responsible for development and execution of the vision, mission, goals, objectives and strategies
 - h. Need to create a shared power setting that will enable consensus on goals, policies, actions, etc.
2. BC Mountain Bike Communities to act as official centers for mountain bike tourism activities
 - a. Develop criteria for official designation of communities
 - b. Determine actions and costs required to meet criteria
 - c. Develop plan for recognition of criteria by MTCA
 - d. Complete inventory of communities and solicit support from them
3. Engage Communities; Regions and Stakeholders
 - a. Build an economic impact study
 - b. Build a full inventory of market ready mountain bike tourism experiences
 - c. Quantify benefits associated with mountain bike tourism
 - d. Develop ongoing education program to target communities; region; stakeholders utilizing board members
 - e. Promote tangible economic benefits, social benefits of mountain bike tourism
 - f. Create political, financial and grass roots support
4. Educate stakeholders and partners on how to improve services to mountain biking visitors to increase visitor satisfaction
5. Communicate with regional and local stakeholders to support the provincial strategy by informing them of the benefits
6. Measure the economic contribution of mountain biking to the provincial economy
7. Promote and encourage products, services, events for mountain biking visitors
8. Convene an executive team of senior management with knowledge of the diverse mountain biking experiences available from all tourism regions of the province

Governance Structure:

The MBTA executive team will be made up of a volunteer board of directors to guide the organization toward meeting its objectives and a paid executive director to perform the day to day business of the MBTA and to coordinate and facilitate the actions taken by the board.



Executive Team Competencies:

The executive team shall be made up of directors offering expertise in a number of key areas:

- Community Planning
- Tourism Operations
- Trail Management
- Destination Marketing
- Market Research
- Event Management
- Local/Regional Government
- Financial Control
- Bike Industry

Executive Team Roles:

Executive Director:

- Manage the day to day affairs of the MBTA including
 - coordination of marketing activities
 - bookkeeping (revenue and expenses)
 - supplier contracts and negotiations
- Assist in the facilitation and implementation of the actions made by the board.
- Act as the MBTA's main point of contact and support for sub-committee members and partnership programs as well as general public relations.
- Be present at all board meetings and discussions unless requested not to be by the Chair.

Chair:

- Ensures the effective action of the board in governing and supporting the organization, and oversees board affairs. Acts as the representative of the board as a whole
- Speaks to the media and the community on behalf of the organization (as does the executive director); represents the organization in the community.
- Develops agendas for meetings in concert with the executive director. Presides at board meetings.
- Recommends to the board, in collaboration with the Executive Director, which committees are to be established. Seeks volunteers for committees and coordinates individual board member assignments. Makes sure each committee has a chair, and stays in touch with chairs to be sure that their work is carried out; identifies committee recommendations that should be presented to the full board.
- Determines whether executive committee meetings are necessary and convenes the committee.
- Establishes search and selection committee (usually acts as chair) for hiring an executive director. Convenes board discussions on evaluating the executive director and negotiating compensation and benefits package; conveys information to the executive director.
- Ensures that board matters are handled properly, including preparation of pre-meeting materials, committee functioning, and recruitment and orientation of new board members.

Vice Chair:

- Acts as the chair in his or her absence; assists the chair in his or her duties or other specified duties.
- Frequently assigned to a special area of responsibility, such as membership, media, annual conference, facility, or personnel.
- May choose to become, the Chair, upon the current Chair's resignation or end of term

Treasurer:

- Manages the board's review of, and action related to, the board's financial responsibilities. May work directly with the Executive Director in developing and implementing financial procedures and systems.
- Ensures that appropriate financial reports are made available to the board. Regularly reports to board on key financial events, trends, concerns, and assessment of fiscal health.
- Collaborates with the Executive Director to prepare financial reports for meetings, including a year-long calendar of issues.
- Recommends to the board whether the organization should have an audit. If so, selects and meets annually with the auditor.
- Ensures sound management and maximization of cash and investments.

Secretary:

- Record the minutes of the board meetings to serve as a record of the actions of the Board.
- The Secretary keeps and signs the minutes in order to represent that the minutes are an accurate reflection of what actually happened at the meeting; the ratification of the minutes by the Board at its next meeting is a further verification that the minutes are accurate.

Regional Directors:

- Represent all provincial tourism regions that may not be represented within the makeup of the board's formal executive positions.
- Represents the organization in their home region
- Participates in board meetings either in person or via conference call
- Carry out special assignments and chairs sub-committees as required

Selecting New Board Members:

The executive board will be self-selected. Board members can be nominated by stakeholders, partners or fellow board members, but it will be up to the current board to decide who will replace outgoing board members. New board members will be selected based on a set of guiding principles that aim to ensure broad representation of stakeholders for both geographic regions and product categories as well as maintain a high level of expertise in the areas of key competencies.

Term of Board Members:

A staggered board of directors will be adopted to ensure continuity in year to year transitions. For the initial set up of the board some positions will be 1 year and the rest 2 year terms and will be up to the board to decide. Chair and Vice-chair must always be staggered.

Adhoc Sub-committees:

Sub-committees will be created to address specific issues or special tasks. Stakeholders, partners, and executive board members may participate in sub-committees. Committees will work together to provide insight, develop strategies and make recommendations for the organization to base decisions on and to implement.

Partnership Programs:

Partnership programs will provide the opportunity for stakeholders to participate in specific marketing campaigns. Each program will have a clear set of objectives and strategies that may focus on a particular group of stakeholders (e.g. lift-access bike resorts, mtb community trail centres, rail trail touring, backcountry bike lodges, etc) or support the sector more broadly (e.g. mtb superhost, etc). Partnership programs require financial management and involve funding commitment from all participants.

Stakeholders:

A stakeholder can be any group or individual for which the actions of the organization affect. The unequivocal intention of the organization is to generate positive outcomes for stakeholders and to provide them with numerous ways in which to participate in the goals of the organization.

The organization must listen carefully to stakeholders and provide effective means to engage stakeholders, generate ideas and gather input – failure to do so will likely result in the organization’s demise. Numerous techniques can be deployed to engage stakeholders to determine their perception of the organization and the extent to which it is meeting their needs; surveys, online forums, committee work, focus groups, and stakeholder analyses exercises. These techniques are vital for a host of situations including; strategic direction, issue resolution, proposal development, and policy implementation.

“Bicycles are social catalysts that attract a superior category of people.”
Chip Brown, "A Bike and a Prayer"

Integrated Marketing Communications Objectives

1. Increase awareness for BC's mountain bike experiences and leverage existing BC awareness
2. Promote the diversity of product diversity and geographical locations
3. Create consumer interest to plan mountain bike experiences in concert with other tourism experiences
4. Leverage earned media and promotional channels
5. Utilize social media channels and online marketing channels
6. Communicate mountain bike friendly program to both consumers and to major stakeholder investors
7. Drive traffic to identified hubs such as HelloBC.com
8. Build an active database of mountain bike tourism consumers

Integrated Marketing Communications Strategies

The following strategies are introduced to create awareness; stimulate interest; create a purchase and build towards repeat visitation and word of mouth recommendation.

1. Product Communications Strategy

- a. Create a communications plan that promotes the broad range of trail and travel experiences as identified under this plan
- b. Market specific experiences and routes that are world class status
- c. Create specific mountain bike routes and circle tours and include amenities

2. Internet Marketing

- a. Build a comprehensive mountain bike tourism website modeled on Switzerland's mountain bike tourism website and New Zealand' mountain bike tourism website
- b. Build a website with a separate platform but linked to HelloBC.com and regional and destination websites
- c. Website to be developed to market the provincial brand with trail guide; GPS based trail maps; blogs; trail reports; Website to be accessible from mobile phones and blackberries
- d. Create a centrally controlled Mountain Bike Events Calendar offering all experiences
- e. Develop an online mapping system for mountain bike experiences
- f. Create online demand and then also funnel consumers towards local and regional websites associated with the relevant mountain biking experience

3. Social Media Strategy

- a. Develop expertise to create a blog for new website
- b. Create a following on Twitter and regularly update
- c. Create a following on YouTube through innovative promotions and video

4. Earned Media Strategy

- a. Host 5 key media annually on assignment – suggested to pursue Outside, Explore, TV, National Geographic, Bike, Decline etc)

5. Publicity Strategy

- a. Create a forum online for press releases; hound the media with stories
- b. Source 5 BC riders as spokespeople and one TV celebrity
- c. Plan for Celebrity Riders appearances at key mountain bike events
- d. Create TBC approved logos for all stakeholders and partners that support (possible revenue source)

6. Paid Media Strategy

- a. Not recommended to pursue a print mountain bike tourism guide
- b. Utilize online channels such as pinkbike.com; NSMB.com
- c. Use magazines for paid media – Bike Magazine for example
- d. Use nontraditional print – Ski magazines Outdoor, Oprah, Canadian Living, Macleans
- e. Outdoor retail shows
- f. Create video with sponsorship and pro's promoting BC
- g. Create a visual mountain bike experience promotion for ferries, billboards, stores
- h. Create TBC industry approved ads in industry publications
- i. Create awareness campaign to attract more female riders
- j. Create TBC Mountain Bike Tourism logo for use in all communications

7. Promotional Strategy

- a. Video Challenge on YouTube and prizes to include circle tours in BC
- b. Cross promote with bike shops and ski resorts to access their customers and offer contests through manufacturers and resort partners
- c. Promote new brand through Mountain Bike film sector
- d. Create Mountain Bike Tourism awards and tie into BC Tourism Industry conference

8. Alliance Strategy

- a. Cross promote in other Experiences BC sectors that have similar target geo demographics
- b. Look to other consortiums for IMC guidance (Nordic, Wine as examples)

Packaging Objectives

1. Packaging must relate to experiences, accommodation and local amenities
2. Need to create relationships with international tour wholesalers
3. Need to bring gateway communities in as packaging partners
4. Need resorts to package a broader product with other activities

Packaging Strategies

1. Mountain Bike Experiences

- a. Develop online provincial trail guide with menu of options to include accommodation; rentals; activities
- b. Establish call to action through Hello BC and Inntopia and regional and destination websites
- c. Package mountain bike experiences with a lead in mountain bike experience and add in other tourism experiences in the regions – culinary; wine; local attractions; Festivals; golf; other outdoor adventure
- d. Develop packages to attract short haul travelers that include a variety of mountain bike experiences
- e. Develop an approved “seal” of approval for mountain bike accommodation, guiding services, related retail using MTCA certification standards similar to approved hotel accommodation
- f. Distribution Channels – ensure local stakeholders in a mountain bike community are aware of packaging options including accommodators; bike shops

2. Tour Wholesalers

- a. Work with MTCA and Canadian Tourism Commission to have representation at major trade shows such as Rendezvous Canada
- b. Create a few epic package options with net rates to offer to wholesalers
- c. Establish a call to action through Tourism BC/Inntopia

3. Package with Gateway Communities

- a. Offer opportunity to main public sector stakeholders (RDMO’s, DMO’s, Chambers of Commerce) to pay to play in integrated marketing communications
- b. Offer opportunity to main private sector stakeholders in gateway communities to pay to play in integrated marketing communications.

Branding Objectives

1. Make British Columbia the gold standard for Mountain Bike tourism
2. Develop a provincial brand to reflect the diversity of the product and play to the core competencies
3. Create a message through the brand that is synonymous with the Vision for the provincial mountain bike tourism sector which will allow us to target and adjust the message to individual target groups
4. Market legally authorized mountain bike tourism experiences

Branding Strategies

- 1. Make BC the gold standard**
 - a. Identify lead examples of market ready mountain bike experiences in each region and build on their success
 - b. Use their examples as best models for provincial branding
- 2. Develop a provincial brand which focuses on core competencies to include:**
 - a. Diversity and abundance and number of experiences;
 - b. Community passion
 - c. Scenic beauty
 - d. Natural environment
 - e. Innovative bike and trail designs
 - f. Less crowds
 - g. Friendly people
 - h. Birthplace of Freeride
 - i. Highest concentration of bike parks
 - j. Real Opportunities for personal challenge
 - k. Epic Experiences available
- 3. Focus on People Branding to include core competencies to include:**
 - a. Pioneering
 - b. Dedicated
 - c. Unique characters
 - d. Spirited
 - e. Passionate

4. Understand other best models of mountain bike tourism. Determine their respective branding strategies and position BC uniquely against them and identify B.C.'s competitive advantages.

Main best models for mountain bike tourism jurisdictions include:

- a. Scotland
 - b. Switzerland
 - c. New Zealand
 - d. Oregon
 - e. Colorado
 - f. Utah
 - g. California
- 5. Develop a provincial logo that adapts to the diversity of experiences**
- a. Recognize that one logo and one tag line will be too generic
 - b. Recommend development of one provincial icon that can be combined with a icon for individual market ready mountain bike experiences
- 6. Develop a provincial tag line to be used in association with the logo. Based on the provincial committee's ideation, the following choices are recommended for presentation to stakeholders**
- a. Where Mountain Biking Began
 - b. Mountain Biking Lives Here
 - c. Mountain Biking Revolves Here
 - d. Birthplace of Mountain Biking
 - e. Home of Free Ride and More
 - f. Ride Free B.C.
 - g. Mountain Biking Rides Here
 - h. This Much Fun Can't Be Legal
 - i. We Started Mountain Biking
- 7. Market Legally Authorized Mountain Bike Experiences**
- a. Implement the BC Recreation Trails Strategy
 - b. Advocate Inherent Risk Legislation

Services Marketing Objectives

1. Establish a consumer recognition program at stakeholder locations
2. Need an educational element to convince all stakeholders and communities of the benefits of mountain bike tourism so that they become ambassadors for this product sector
3. Develop market ready criteria to communicate expectations to consumers– examples being Trails Quality Standards; Liability Insurance; Bike Storage
4. Create an ongoing customer feedback loop and ways to measure success of the marketing plan
5. Develop measures to demonstrate economic value of Mountain Bike Tourism to the Province and investors

Services Marketing Strategies

1. Consumer Recognition Program

- Establish Mountain Bike friendly services – transportation/accommodation/restaurants using Scotland best models example
- Ensure BC mountain bike communities are competitive with world's best models - Integrate World Host program to the sector – Mountain Bike Superhost and train all front line staff employed by stakeholders on a pay to play basis<

2. Establish a stakeholder education program – create a tool kit for presentation to key internal stakeholder groups. Based on the New Zealand tool kit (www.tourism.govt.nz/documents)

Create a stakeholder tool kit that is user friendly and includes:

- Identify brand and tag for BC Mountain Bike Tourism
- Mountain Bike Tourism Experiences
- Who are consumers – expectations and motivations (see research needs)
- Target Markets
- Trail Standards
- Trail Designation
- Trail Approvals
- Marketing Strategies
- Financing
- Top Ten Success Stories in BC Mountain Bike Tourism citing local communities
- Highlight economic benefits to include ROI and the linkages between tourism and travel motivators
- Outline how communities and regional governments can be involved
- Outline funding sources and best models resources
- Outline risk and liability management concerns
- Build communications program to rest of the mountain bike tourism industry; MLA's; Regional District Boards; Municipalities; UBCM

- 3. Establish and communicate market ready mountain bike experience service guidelines and standards for all major operators and mountain bike tourism services (i.e. Bike Valet at hotels)**
 - a. Utilize Tourism BC Mountain Bike Essential Book to build capacity at the community level and to develop key success factors that consumers want such as:
 - i. How to build trails
 - ii. How to build clubs
 - iii. Trail Signage and Map Standards
 - iv. Trails Quality Standards
 - v. Liability Insurance Requirements
 - vi. Bike Storage
 - b. Integrate World Host program to the sector – develop and find sponsor for BC Mountain Bike Superhost
 - c. Create Mountain Bike Guiding certification through a recognized academic institution
 - d. Develop Trail Rating System and Standards using local Clubs and MBTA for trail skill levels and for signage and mapping
- 4. Customer Feedback Loop**
 - a. Enable consumers to provide real time feedback via website
 - b. Develop, execute and measure Ongoing consumer experience surveys
 - c. Need website trail reports
- 5. Measures of Accountability**
 - a. Develop economic impact analysis for sectors of the mountain bike tourism industry
 - b. Develop benchmarks for the success of the Mountain Bike Tourism plan

Product Development Objectives

1. Develop a product inventory that identifies the experiences and locations. Need clearly defined mountain bike trails defined by type of ride and geography.
2. Seek Legal Trail Authorizations for epic trails, local trails and for wilderness trails (e.g. rail trails)
3. Standardization of signage and trail maps that can be adapted in each geographical area
4. Understand consumer and travel motivations of distinct user groups for all mountain bike tourism experiences. Investigate mountain bike riders and industry knowledge, attitudes and behaviours on key issues:
 - Provide a comprehensive analysis of consumers and retailers motivations and behaviours
 - Enhance understanding of barriers and drivers likely to impact on initiatives and measures
 - Recommend strategies on how to improve economic outcomes.
5. Develop new mountain bike events and festivals and create instructional camps
6. Create “authentic” or “designated” riding communities
7. Achieve IMBA A+ rating on key indicators

Product Development Strategies

- **Mountain Bike Experience Product Inventory**
 - a. Conduct Survey of stakeholders to include: mountain bike clubs; trail stewardship groups; municipalities; resorts; regional governments; MTCA Recreation Trails division; BC Parks; DMO's and RDMO's
 - b. Determine criteria for market ready
 - c. Evaluate mountain bike experiences as market ready and emerging
 - d. Inventory needs to consider: (Types of riding, Infrastructure, Services)

What are the types of experiences available to promote?

- Technical rides – cross country and free ride
- Alpine rides
- Family rides
- Multi day long distance rides
- Lift assisted bike parks
- Skills parks
- Festivals, events, competitions

What trail infrastructure is available for these experiences?

- Data base of trails in each region – length, technical rating, physical rating, legal status, features/“experiences”, signage, maps, managed by, usage
- Iconic trails or networks, IMBA Epic trails, local signature trails
- Information on lift assisted bike parks – number of lifts, km of trails, technical ratings, vertical drop, signature trails

What services are available to support the experiences?

- Guiding services
- Skills camps
- Bike shops
- Cycling clubs
- Maps and information
- Accommodations – “bike friendly”
- Shuttle services

What are the gaps? What needs to be further developed?

- Identify strategies for obtaining this information
 - Clarifying what we want inventoried along with the kinds of qualifying data is important. e.g. we might build an inventory of longer distance cross-country trails open to mountain bikes in the Province, but want to provide some data as to how "tourism market" ready they might be, or what kinds of supporting infrastructure surrounds each to help target them for specific markets.
 - Other trail systems may be great destinations, but the local managing stewardship group doesn't want them widely publicized.
- **Establish Provincial Leader is to centralize information, mobilize others, and turn existing opportunities into successes.**
 - a. Create sharing agreements between stakeholders who have local inventories of trails, events, and experiences
 - b. Develop a membership base of all stakeholders
 - c. Establish a grant program which enables members to further develop mountain biker experiences.
 - d. Minimize liabilities for affiliate members.
 - e. Tie to governance – how the inventory gathering will work and who will champion it, keep it up to date, mobilize it.
 - f. Importance of consent from local groups who are creating the inventory
 - g. Interest in a bottom-up approach to this, that engages groups, orgs, operators – the process needs to engage on this level (Noted examples of marketed experiences where the folks on the ground felt they were never consulted or provided consent to have their trails, operations, experiences included in formal marketing packages – and where there was no return benefit to those groups)
 - h. Both a formal and informal (relational) process will likely be needed
 - i. KEY: local riders/clubs have to see benefit from all of this. Must help to build capacity.
 - j. Also include collaboration with other associations: IMBA, NSMB, educational institutions (e.g. Capilano College, TRU Tourism), publications – writers, photographers

- **Trail Authorizations**
 - a. Continued authorization of new trails and experiences that are accessible to all users
 - b. Implement BC Recreation Trails Strategy
 - c. Incorporate trail designation as trails are built and encourage trail clubs to apply for designation

- **Standardization of Signage and Trail Maps**
 - a. Use Tourism BC Mountain Bike Essentials Guide to start process
 - b. Solicit and develop best practices from stakeholders and best models
 - c. Create MTCA approved trail ratings system and apply this to all legally approved and market ready mountain bike trails
 - d. Create a provincial level of certification for trail builders
 - e. Adopt standardized safety program based on best practices. Standardization of trail ratings system “MTBA or MTCA Approved”
 - f. Expand upon Bike Parks BC Resorts trail ratings and trail maps for use across all mountain bike trail experiences
 - g. Consider Canada West Ski Areas Association standards for signage and trail maps
 - h. Work with MOT to create provincial highway signage to promote trails and trailheads
 - i. In each geographic area work towards sanctioning at least one trail in each rating category to serve as the measure by which other trail signage and ratings are measured. – would establish a local benchmark – something for local trail builders to reflect on

- **Consumer Research**
 - a. Qualitative research to explore and scope out what was happening and why (Community Meetings, Focus Group Research, Retailer Interviews)
 - b. Quantitative research to determine the extent of what was happening (Online Survey, Stakeholder Online Survey)
 - c. Assemble and review existing market research (e.g. MBTA, Sea-to-Sky, Whistler, Shuswap Trail Strategy, BC Tourism TAMS)
 - d. Identify gaps in our knowledge – what are they?
 - e. Also – compare regional data – is it transferable? Is there a gap in which the consumer is outside of the lower mainland? (e.g. Suggestion that Whistler/Sea-to-Sky market data may differ from Nelson with demographic/income differences (Nelson may be seen as more affordable, longer stays)
 - f. Target: more market research on out-of-lower-mainland riders
 - g. Use the templates developed by MBTA for the North Shore/Sea-to-Sky studies – we have the expertise
 - h. Might adapt this for inclusion in the Tool-kit
 - i. Possible partnership opportunities to collaborate with Universities/Colleges (e.g. TRU Tourism 4th Year Research students)
 - j. Collaborate with publications, websites, writers, photographers
 - k. Ongoing could be facilitated through some kind of annual or semi-annual commitment to share knowledge (perhaps online or as a conference call.)
 - l. Using secondary research of the global mountain bike tourism industry, identify main driving forces of change within the mountain bike tourism industry and identify “Key Success Factors” critical for the success of the industry

- **Development of New Product**
 - a. Work with regional Economic Development commissions; Community Futures and Entrepreneurship groups to educate private sector on new opportunities
 - b. Promote Mountain Bike Tourism within leading educational institutions
 - c. Create Designated Mountain Bike Communities
 - d. Conduct global secondary research to determine characteristics of best mountain bike communities;
 - e. Conduct primary research of stakeholders to determine characteristics of best mountain bike communities
 - f. Determine main characteristics and rank potential communities according to priority
 - g. Determine steps and resources required for becoming an official Mountain Bike Community
 - h. Educate BC communities on feasibility and steps required to become an official Mountain Bike Community

Appendix #1 – Consumer and Travel Trends

U.S. Passport Requirements

The U.S. Western Hemisphere Travel Initiative (WHTI) is a new American law designed to increase U.S. border security. The law has resulted in new identification requirements for persons entering or re-entering the United States. By June 1, 2009, the U.S. government will implement the full requirements of the land and sea phase of WHTI.

Air Travel

All persons, including U.S. citizens, are required to present a passport or other secure travel documentation to enter or re-enter the United States by air. The U.S. Passport Card will not be accepted as a valid form of identification.

Land and Sea Travel

U.S. and Canadian citizens will need to present either a WHTI-compliant document, or a government-issued photo ID, such as a driver's license, plus proof of citizenship, such as a birth certificate. The passport requirement does not apply to U.S. citizens travelling to or returning directly from a U.S. territory.

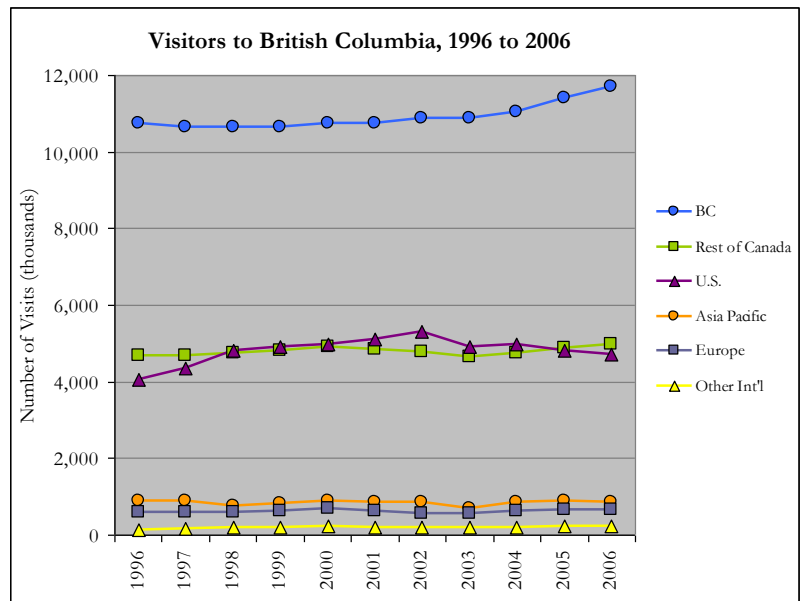
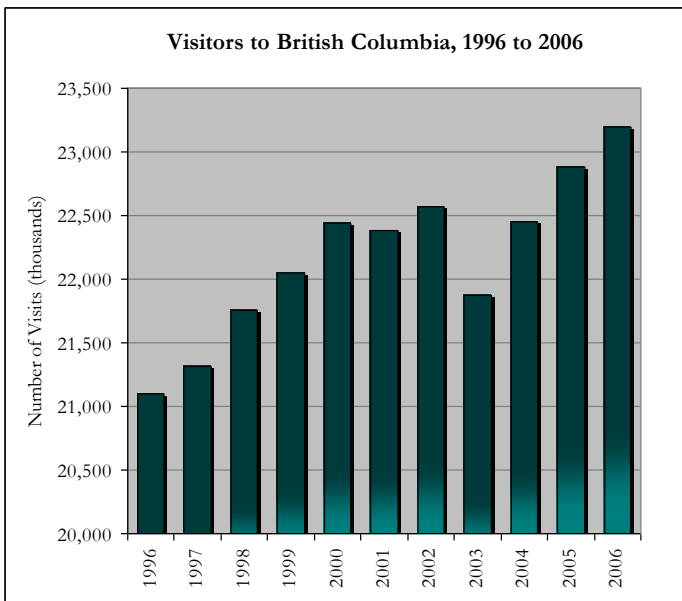
Summary of Recent Research:

- In a 2008 survey of US households, the Travel Industry Association (TIA) found that 76% of all American travelers made travel plans on-line, while 81% had made a reservation/booking on-line. Among that trip planning on-line, 46% used destination websites (66% used on-line travel agency sites). The most common on-line activities were a) gathering info about their chosen destination, b) searching for hotel prices or places to stay, c) finding information about airline fares and schedules, and d) searching for things to do. The largest demographic of online travelers are between 30 and 49 years of age (42%).
- In a 2006 survey of online Canadian travelers, approximately two-thirds use the Internet to plan or shop for travel products and on average consult four sites before making a travel purchase. Nearly 90% of Canadian online travelers purchased plane tickets (88%) and hotel rooms (88%) on the Internet, whereas 62% booked rental cars and 43% booked travel packages online.
- In a 2005 survey of inquirers to a provincial marketing agency or Parks Canada 95.6% of respondents reported using the Internet for trip planning. Planning accommodation was the most common use (89.0%) followed by attractions (77.0%), flights (73.9%) events (61.5%), and activities (60.4%). Over 50% booked at least some accommodation (76.6%) or flights (66.0%) on-line, while fewer booked tickets for events (26.8%), attractions (15.3%), or activities (14.4%)



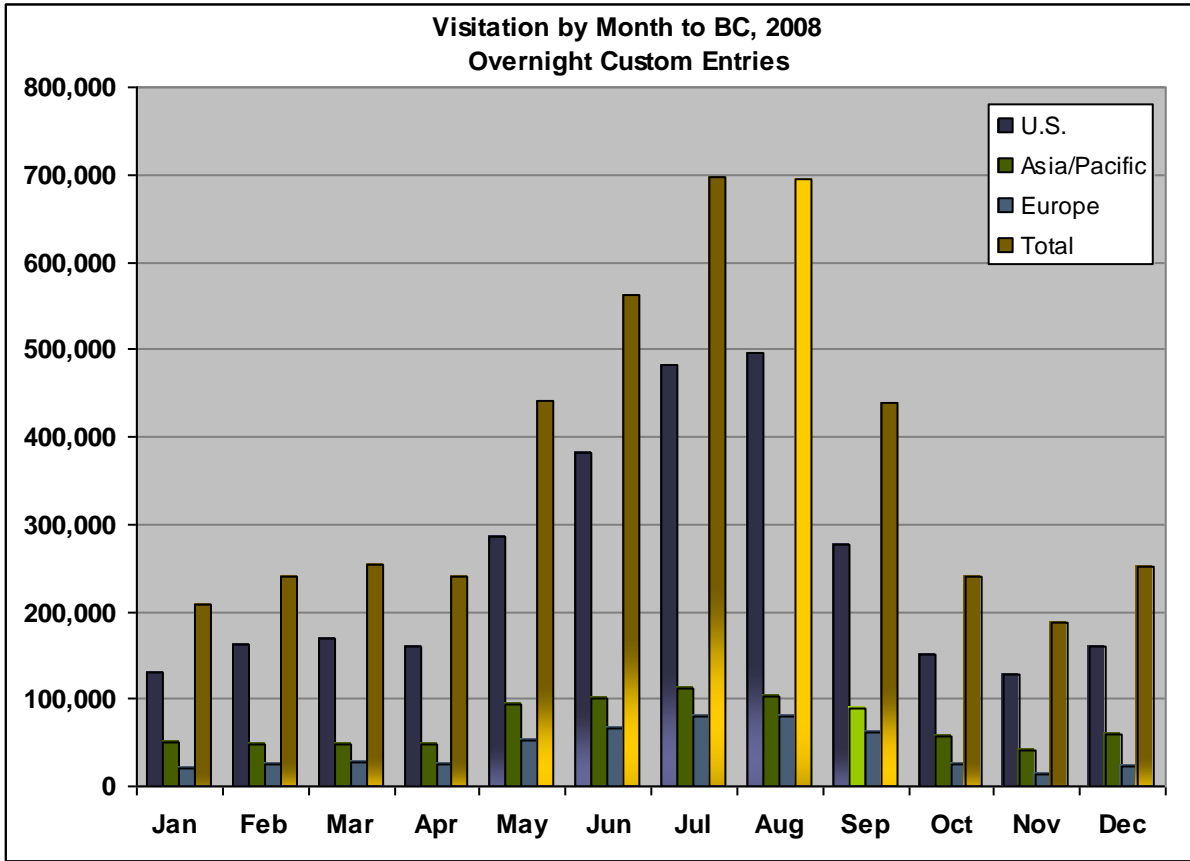
- On-line user generated content (UGC) has become very important in the last two years. A 2007 survey of TripAdvisor.com users most used travel reviews to narrow down choices (64.7%) and, at the beginning of the planning process, to get ideas (63.7%). While respondents most frequently looked for other travelers’ reviews on virtual community websites (92.3%), 44.6% looked for reviews on local destination websites. Respondents indicated that they based the value and credibility of travelers’ reviews on the reviewers travel experience (75.3%), the level of detail in the description (71.0%), and activities engaged on during the trip (65.9%).

Appendix #2 – BC Travel Trends



Market Origin	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	% of total (2005)
BC	10,246	10,655	10,762	10,654	10,654	10,654	10,761	10,761	10,869	10,869	11,032	11,418	50
% change		4.0%	1.0%	-1.0%	0.0%	0.0%	1.0%	0.0%	1.0%	0.0%	1.5%	3.0%	
Rest of Canada	4,439	4,602	4,666	4,674	4,746	4,828	4,914	4,832	4,789	4,645	4,738	4,864	21
% change		3.7%	1.0%	0.2%	1.0%	1.7%	1.8%	-1.7%	-0.9%	-3.0%	2.0%	2.6%	
U.S.	3,691	4,042	4,045	4,342	4,806	4,900	5,063	5,103	5,297	4,905	4,994	4,828	21
% change		9.5%	0.1%	7.3%	10.7%	2.0%	3.3%	0.8%	3.8%	-7.7%	0.1%	-3.4%	
Asia Pacific	548	749	878	888	758	826	879	852	872	702	859	880	4
% change		36.8%	17.2%	1.1%	-	9.0%	6.4%	-3.0%	2.3%	-	22.3%	2.4%	
Europe	483	536	606	590	596	642	658	619	551	551	616	668	3
% change		11.0%	13.0%	-2.7%	1.1%	7.8%	2.5%	-6.0%	-	0.0%	11.9%	8.4%	
Total	19,498	20,678	21,100	21,313	21,753	22,053	22,491	22,381	22,571	21,870	22,450	22,886	100
% change		6.1%	2.0%	1.0%	2.1%	1.4%	2.0%	-0.5%	0.8%	-3.2%	2.2%	1.7%	

*Visitors to British Columbia, 1994 to 2005 (thousands)



**Visitation by Month to BC, 2008
Overnight Customs Entries**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total 2008	% June to Sept.
U.S.	131,402	162,169	170,212	160,090	285,119	381,561	481,236	496,597	275,692	151,462	127,947	159,831	2,983,318	55%
Asia/Pacific	50,561	47,915	46,904	49,080	94,445	101,306	112,204	103,882	89,959	57,350	40,119	58,902	852,627	48%
Australia & New Zealand	14,584	7,905	6,732	8,957	28,961	25,765	21,031	24,717	23,112	8,584	7,985	15,949	194,282	49%
Japan	7,444	10,000	12,442	9,770	14,319	14,953	18,792	21,032	17,392	14,110	6,930	9,750	156,934	46%
South Korea	9,367	8,106	7,461	7,501	10,359	12,311	16,836	13,548	10,182	7,066	4,599	7,278	114,614	46%
China	5,610	6,102	4,617	5,937	8,900	9,358	14,412	11,605	11,413	8,075	6,465	6,911	99,405	47%
Hong Kong	4,355	7,034	5,359	3,839	7,154	10,295	15,776	11,381	8,865	5,842	3,605	6,202	89,707	52%
Taiwan	2,924	2,638	2,628	3,494	5,806	8,940	7,609	5,189	4,150	3,382	1,744	2,192	50,696	51%
Europe	19,753	24,492	27,866	24,239	51,497	66,480	80,687	79,891	61,779	25,012	14,597	23,937	500,230	58%
United Kingdom	10,351	13,270	16,552	12,143	25,909	30,637	32,555	33,385	30,798	10,809	6,568	12,719	235,696	54%
Germany	2,673	2,773	2,606	2,792	8,794	12,056	13,397	15,129	11,854	4,060	2,062	2,799	80,995	65%
Total	208,529	240,743	254,618	239,967	441,258	563,172	696,794	695,976	438,978	240,156	187,385	251,764	4,459,340	54%

Appendix #3 – Visitor Characteristics

Characteristics By Geographic Origin

Visitor Characteristics by Geographic Origin analyzes traits among visitors from BC, Canada, the United States, Asia Pacific (Japan, Australia & New Zealand, South Korea, Taiwan and China), and Europe (United Kingdom and Germany) that may be relevant to BC communities. Some of the information in these profiles is older but only information that is deemed to be still relevant has been included.

BC Residents

Not only do BC residents make more trips in BC than any other market, they are most likely to travel in BC throughout all seasons and across more regions than any other market. Overall, 70% of overnight trips taken by BC residents were within BC¹⁷.

What Regions BC Residents Visit

BC Tourism Region	*% of Overnight Trips
Vancouver Island	26.8
Vancouver Coast & Mountains	31.4
Thompson Okanagan	24.0
Cariboo	3.4
BC Rockies	5.1
Northern BC	7.1

Source: Canadian Travel Survey, pooled data 2001 – 2004

*does not sum to 100% due to rounding, non-response or travelling between regions

Origin of BC Travelers taking Overnight Trips in BC

BC Tourism Region	*% of Overnight Trips
Vancouver Island	24.4
Vancouver Coast & Mountains	43.9
Thompson Okanagan	15.0
Cariboo	2.7
BC Rockies	5.4
Northern BC	8.4

Source: Canadian Travel Survey, pooled data 2001 – 2004

*does not sum to 100% due to rounding, non-response or travelling between regions

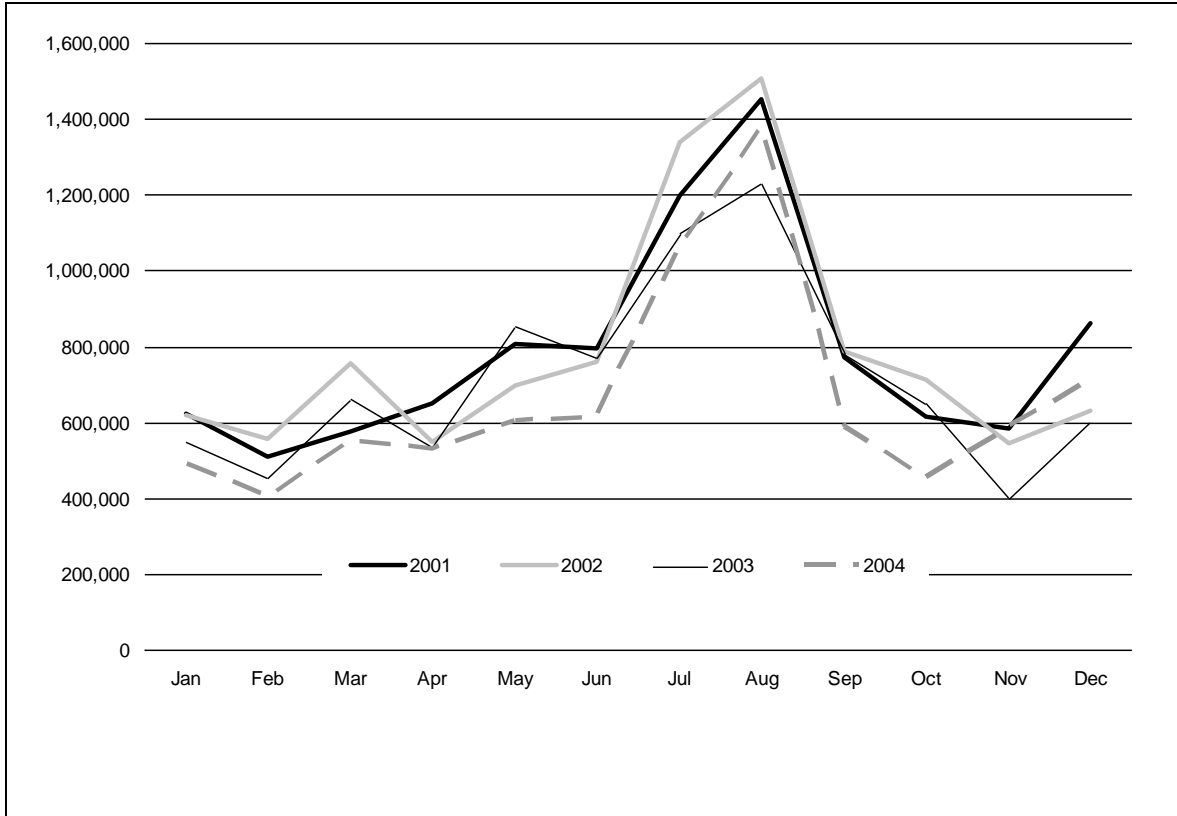
¹⁷ Source: Canadian Travel Survey, pooled data 2001 - 2004



Seasonality

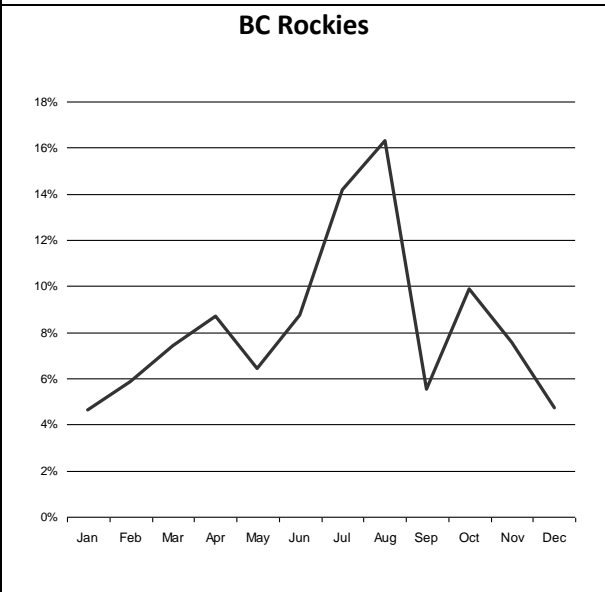
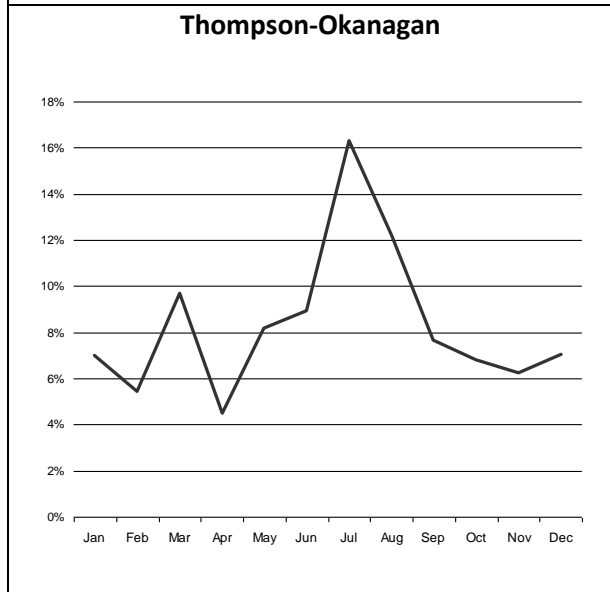
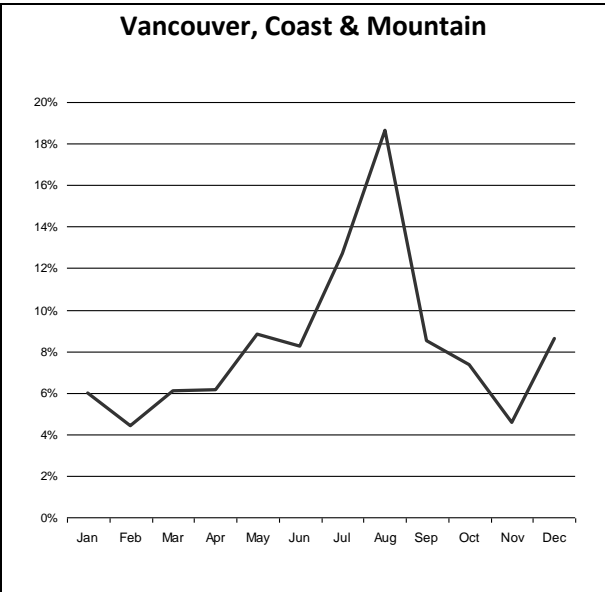
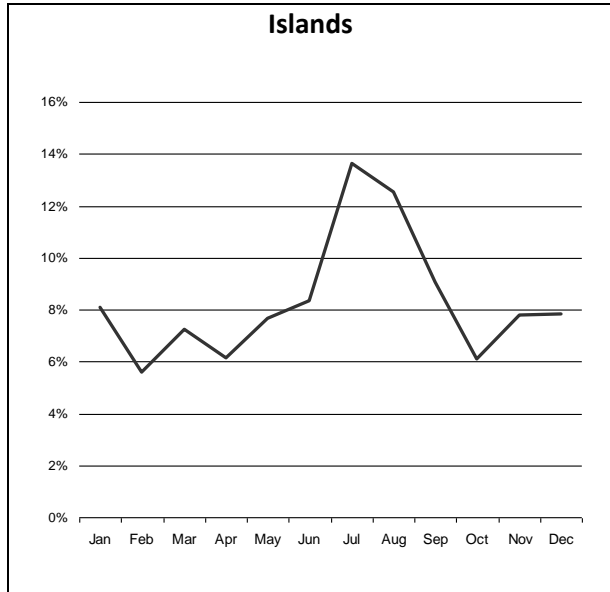
BC Residents predominantly take overnight trips in British Columbia in July and August; this overall pattern is prevalent in each Tourism Region as well.

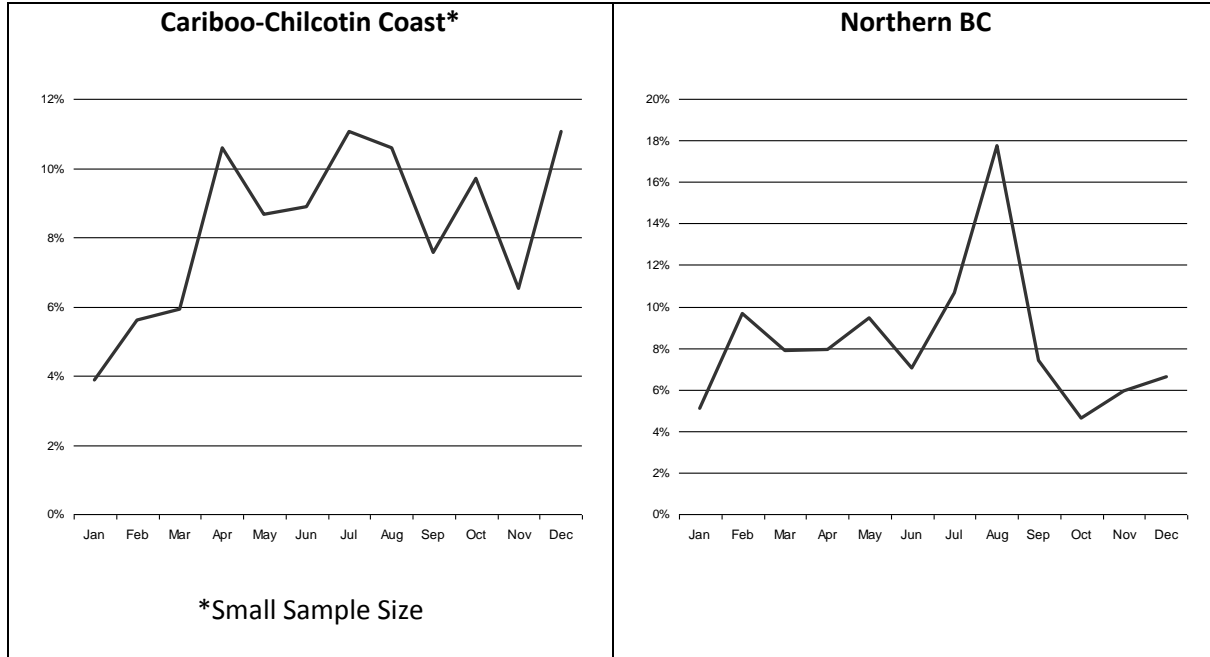
BC Resident Overnight Travel Volume 2001 - 2004



Source: Canadian Travel Survey, pooled data 2001 - 2004

2001 - 2004 Seasonality of BC Overnight Visitors by Tourism Region Origin





Source: Canadian Travel Survey, pooled data 2001 - 2004

Trip Purpose

Over half of the trips taken by BC Residents within BC were taken for personal/pleasure reasons (57%) and one third of trips were for visiting friends or relatives (VFR) (33%), followed by 10% for business purposes.

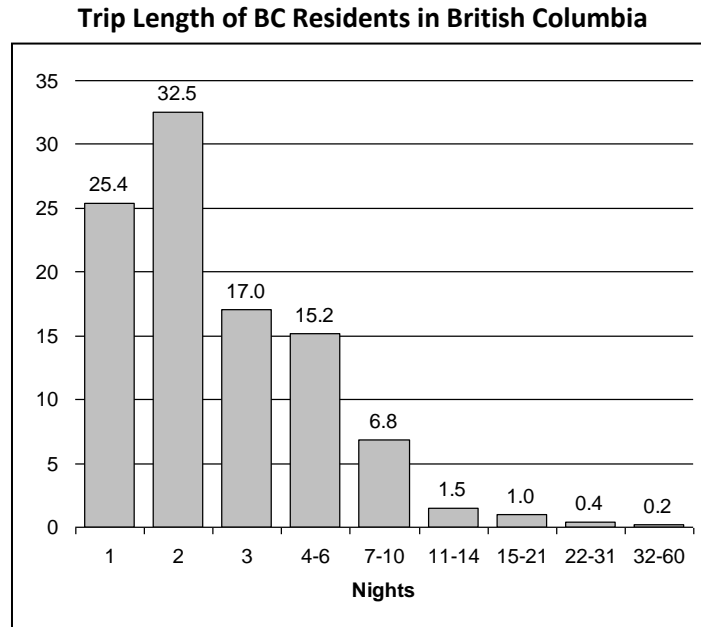
Overnight Travel of BC Residents by Purpose

	VFR	Personal / Pleasure	Business	Other
BC	33%	57%	10%	1%
U.S.	21%	65%	13%	1%
Alberta	46%	38%	15%	1%
Ontario	39%	28%	32%	1%
C&S America & Caribbean	5%	89%	6%	1%
Prairies	54%	27%	19%	1%
Asia	45%	35%	19%	1%
Europe	34%	51%	12%	3%
Québec	32%	26%	42%	0%
Atlantic Canada	49%	33%	17%	1%
Oceania	35%	58%	7%	0%
Other*	46%	29%	24%	0%
Total	33%	55%	12%	1%

Source: Canadian Travel Survey, pooled data 2001 - 2004

Trip Length

The average length of stay by BC residents travelling within British Columbia was 3.2 nights, with an average of 3.5 nights for pleasure travelers. Overall, 90% of overnight trips taken in BC were less than one week in duration.



Source: Canadian Travel Survey, pooled data 2001 - 2004

Accommodation

Staying with friends and family is the most common form of accommodation used by BC residents who take overnight trips within British Columbia, followed by hotels (21.2%) and camping (14.5%).

Type of Accommodation Used BC Residents Taking Overnight Trips in BC

Purpose	Total
Friends / Relatives	47.1
Hotel	21.1
Camping	14.5
Motel	6.8
Private Cottage	6.1
Commercial Cottage	2.5
Resort	1.7
B&B	1.5
Hunt/Fish Lodge	0.4

Source: Canadian Travel Survey, pooled data 2001 – 2004

*Column totals may sum to more than 100 as more than one type of accommodation may have been use on a trip.

Transportation

The major mode of transportation by BC residents who had overnight trips in British Columbia was automobiles (85.3%), followed by boat (5.7%) and air (4%).

Type of Transportation Used by BC Residents Taking Overnight Trips in BC

Mode	Total
Auto	85.3
Air	4.3
Bus	3.8
Rail	0.2
Boat	5.7
Other	0.7

Source: Canadian Travel Survey, pooled data 2001 – 2004

Expenditures

The average spending on an overnight trip by a BC resident from 2001 – 2004 was \$371.91 (per household). Accommodation contributed the most to the overall cost (23%), followed by food & beverages at restaurants/bars/pubs (19%) and personal vehicle expenses (18%).

Because travel within the province is so accessible, BC resident travelers within BC cover a broad demographic group. As the cost for BC residents to travel in BC is significantly lower than for out-of-province visitors, it is not dependent as much on high-income levels. As a result, BC resident visitors are younger than all other visitor markets to BC. Almost three-quarters were employed and more than one half (58%) had at least some post secondary education. Eight out of ten residents came from lower and middle-income households (32% and 49% respectively)¹⁸. BC residents will travel in BC with their children but they will also take trips without them. However, the most frequent BC resident visitors have the same profile as frequent travelers in Canada and the U.S.: they are typically 45+, with older or grown children, in their peak earning years, and tend to travel as couples.

Canada

Demographics favor a sustained increase in Canadian and American frequent travelers. Canada and the U.S. experienced the same baby boom phenomenon that has positive implications for tourism. Frequent leisure travelers tend to be those with enough time and disposable income to travel. They are typically 45+, with older or grown children, in their peak earning years, and tend to travel as couples. Baby boomers are currently in their peak travel years and will continue to be for at least the next 15 years.

In Canada, the baby boom occurred between 1947 and 1966, so baby boomers are 40 to 59 years old in 2006.

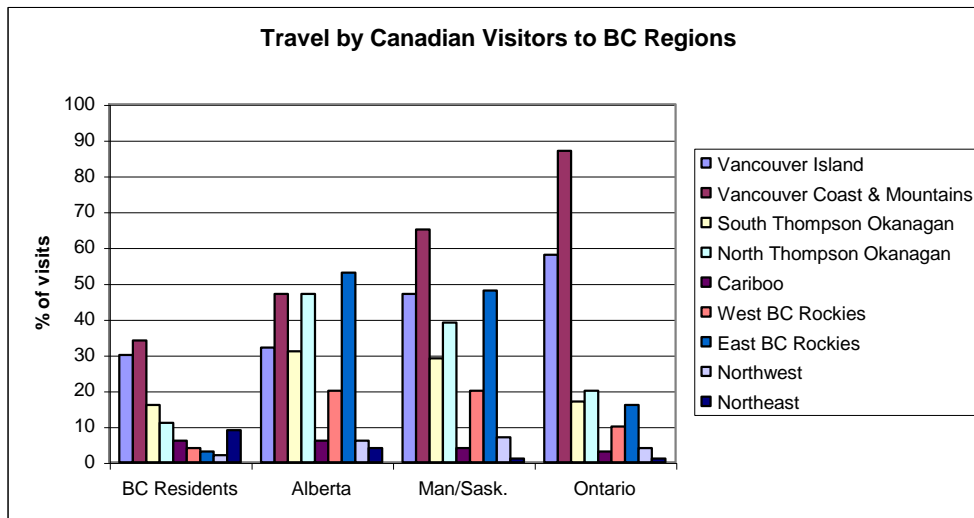
¹⁸ Source: Tourism BC Visitor Study, 1995/96

From 2004 – 2005, 84% of adult Canadians took at least one overnight trip in Canada, where residents from Calgary and Vancouver were the most likely to travel overnight¹⁹.

British Columbia is by far the most appealing of all the destinations respondents to the survey were asked to rate, where 70% of respondents rated BC as very appealing compared to Quebec and Ontario (46%)²⁰.

BC residents are the most likely to travel throughout all regions of BC rather than concentrating their visits to a few regions. Regional Canada visitors (Alberta, Saskatchewan, and Manitoba), because many drive to BC, also visit several regions of the province. Long Haul Canada visitors (Ontario and east) tend to concentrate their visit to the Vancouver Coast and Mountains and Vancouver Island regions.

For Alberta visitors, the most popular regions are East BC Rockies, North Thompson Okanagan, and Vancouver Coast and Mountains. For Manitoba and Saskatchewan visitors, the most popular regions are Vancouver Coast and Mountains, East BC Rockies, and Vancouver Island.

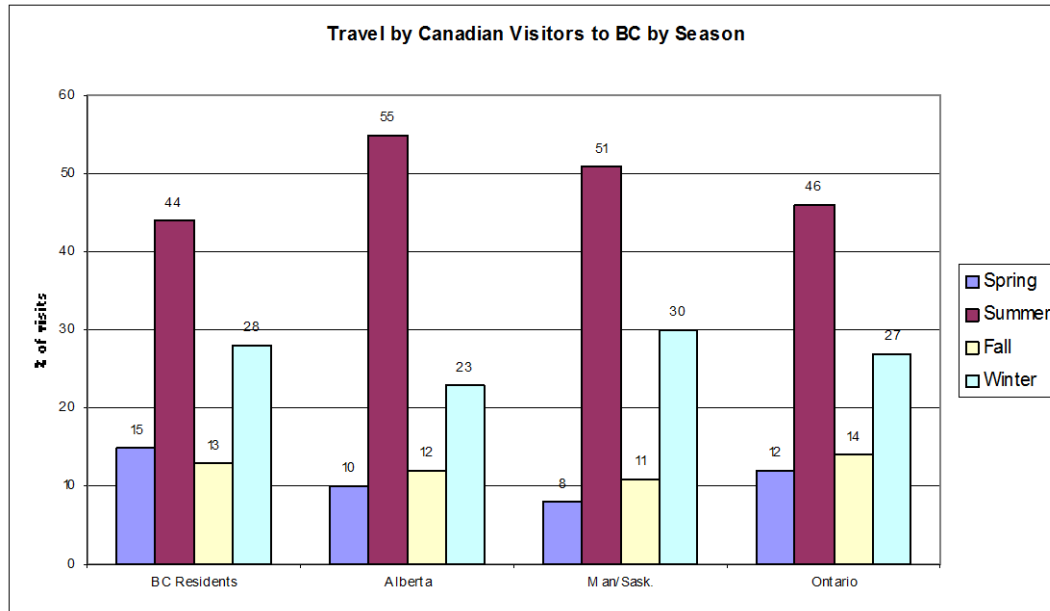


Source: Tourism BC Visitor Study, 1995/96

¹⁹ Source: Travel Activities and Motivation Study, 2006

²⁰ Source: Travel Activities and Motivation Study, 2006

While most travel in BC occurs in the summer months (from June to September), BC resident travelers make up the vast majority of visits outside the summer months. Ontario visitors also show a propensity to travel during the non-summer months, while visitors from Alberta and Manitoba/Saskatchewan are more likely to visit in the summer.



Source: Tourism BC Visitor Study, 1995/96. Spring is defined as April and May; Summer is defined as June to September, Fall is defined as October and November, and Winter is defined as December to March.

Canadian leisure visitors to BC participate in a wide variety of activities, ranging from city/town activities to wilderness activities. However, Canadian leisure visitors to BC are also interested in more specialized activities and the sheer numbers of them, particularly BC residents, mean that they are a good target group for many product sectors.

The most frequent activities by Canadian overnight travelers while on a trip (not specific to a trip to British Columbia) are:

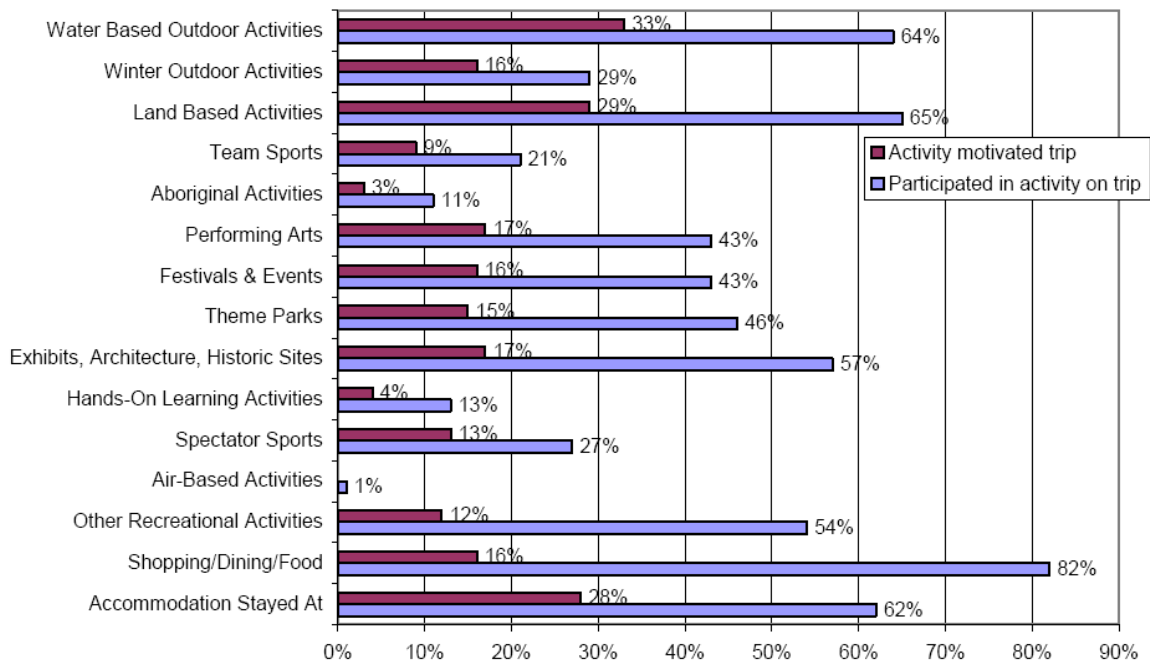
- Dining at restaurants that offer local ingredients and recipes
- Shopping for clothing, shoes or jewellery
- Shopping for books and music
- Strolling around a city to observe buildings and architecture
- Sunbathing on a beach

The activities that were usually the primary motivator of trips that included them are (not specific to a trip to British Columbia):

- Big-game hunting
- Snowmobiling – as an overnight touring trip
- Package golf tours on various courses
- Motorcycling overnight touring

The following table summarizes the activities performed by Canadian citizens by participation and motivation on overnight trips in 2004-2005.

Activities Participated on Overnight Trips in 2004-05



Alberta Residents to BC

Alberta residents were the largest market from outside of the province, accounting for a total of 15% of all travelers to BC. Alberta residents took the majority of their trips in the summer months of July and August, with the majority of Alberta trips to BC being taken for pleasure purposes²¹.

Alberta residents travelling in British Columbia spent an average of 5.3 nights in BC on their trip with friends and relatives being the most common form of accommodation used. With the exception of business travelers, auto travel was the most common form of transportation used. The average spending per household of an Alberta traveler within BC was \$805.38, ranging from \$618 for VFR travelers to \$1,015 for business travelers. The average party size was 2.4 people, with participating in sports, visiting relatives, sightseeing, visiting friends, and shopping, and being the most common activities undertaken.

Market Origin

Just over half of BC's Alberta visitors came from Calgary and the surrounding area (51%), while another quarter came from Edmonton (23%), with Alberta's Heartland making up the majority of the rest (e.g. Red Deer). Calgary was the primary source of all types of travelers, although there was some variation, with 54% of pleasure originated from the city, while only 42% of personal travel trips came from Calgary. Edmonton had a disproportionately large share of business travelers at 28%.

Origin tourism region by purpose of travel

	VFR	Pleasure	Personal	Business	Total
Alberta's North	5.7	4.2	9.1	5.7	5.2
Alberta's Heartland	15.1	11.5	17.7	12.4	13.1
Edmonton and Area	23.8	22.4	23.5	28.3	23.4
Alberta's Rockies	0.7	1.3	0.4	0.8	1.0
Calgary and Area	47.7	53.6	42.3	49.5	50.6
Alberta's South	7.0	7.0	7.0	3.4	6.8
Total	100.0	100.0	100.0	100.0	100.0

Source: Canadian Travel Survey, pooled data 2001 – 2004

²¹ Source: Canadian Travel Survey, pooled data 2001 - 2004

Destinations

Overall, the B.C. Rockies tourism region was the most common destination of Alberta travelers to BC, at nearly 34% of all trips, followed by the Vancouver, Coast and Mountains region and the Thompson-Okanagan regions at 24% and 22%, respectively. For Alberta travelers on VFR trips, the Vancouver, Coast and Mountains tourism region was the most frequent destination, while for pleasure travelers, the BC Rockies were the most frequented, and personal travelers most frequently went to the Thompson-Okanagan. Not surprisingly, the Vancouver, Coast and Mountains region was the most popular business destination.

Destination tourism region by purpose of travel

	VFR	Pleasure	Personal	Business	Total
Alberta Destinations	0.3	0.7	3.3	1.4	0.8
The Islands	12.8	8.5	11.9	5.9	9.8
Vancouver, Coast & Mountains	32.3	13.5	24.6	59.6	24.0
Thompson - Okanagan	21.8	21.6	32.6	10.7	21.5
B.C. Rockies	23.2	45.9	15.0	11.7	33.8
Cariboo	0.9	1.6	0.9	1.8	1.4
Northern B.C.	7.2	3.5	10.4	8.8	5.6

Source: Canadian Travel Survey, pooled data 2001 – 2004

Origin and destination of BC travelers in BC

	Alberta's North	Alberta's Heartland	Edmonton and Area	Alberta's Rockies	Calgary and Area	Alberta's South	Total
Alberta Destinations	5.3	1.5	0.0	1.7	0.5	0.5	0.8
The Islands	11.6	12.4	13.3	4.9	7.6	9.5	9.8
Vancouver, Coast & Mountains	18.2	18.9	29.6	11.7	24.7	17.6	24.1
Thompson - Okanagan	17.3	29.9	25.8	11.6	18.9	14.7	21.4
B.C. Rockies	10.8	23.9	16.7	58.6	43.5	51.8	33.8
Cariboo	1.0	2.0	2.8	0.0	0.7	0.9	1.4
Northern B.C.	35.8	8.9	6.9	4.4	1.5	3.1	5.6

Source: Canadian Travel Survey, pooled data 2001 – 2004

Ontario Residents to BC

- Ontario residents were the second largest source of overnight inter-provincial visitors as a whole to the province and the largest source of business travelers.
- Ontario residents spent an average of 10.0 nights in Canada on trips, which included at least one night in BC, of which 8.5 nights were spent in BC.
- Ontario visitors to BC are equally likely to stay in a hotel (54%) or with friends and relatives (50%)
- With the distances involved for Ontario residents taking a trip in BC, air was the dominant mode of transportation, used by nearly 90% of all travelers, and nearly all business travelers (99%).
- The average spending per household on an overnight trip during the 2001-2004 by Ontario residents traveling to BC was \$2,422.99, or \$1,322.85 when excluding intercity transportation costs.
- Overall, the average party size of Ontario visitors to BC was 1.7 members, the majority of all parties travel parties composed of one or two members (85%).
- The most common age category of all Ontario travelers was the 45-54 age category, with 20% of the total responses, followed closely by 35-44, 25-34, and the 55-64 age group, totaling 19%, 17%, and 12%, respectively.
- Many Ontario travelers to BC had a relatively high household income, with close to half of respondents (43%) indicating that their household income was over \$80,000.
- Ontario travelers to BC undertook a variety of activities while on their trip, with the most common being sightseeing, shopping and visiting relatives or friends.

Market Origin

The Toronto and Ottawa, and South Central Ontario areas generated just over two-thirds of BC's Ontario travelers (67%) with Toronto being the primary source. Broken out by the purpose of trip, Ontario's capital was the source of nearly half (49%) of all business travelers, with the Ottawa region also being an important source of travelers. South-Central and South-western Ontario, along with Toronto, were also important sources of VFR travelers.

Origin tourism region by purpose of travel

	VFR	Pleasure	Personal	Business	Total
Toronto and area	30.4	41.5	43.9	48.5	40.1
Ottawa region	9.9	15.8	12.5	16.0	13.7
South-Central Ontario	14.2	11.7	15.4	15.1	13.7
Central Ontario	12.7	5.4	8.9	8.9	9.0
South-western Ontario	11.4	7.3	10.6	3.0	7.7
St. Lawrence River Corridor	3.7	4.2	1.1	3.1	3.5
Niagara region	4.0	4.4	2.7	0.7	3.1
Essex	3.3	3.5	0.4	1.3	2.6
Eastern Ontario	3.5	1.5	2.7	1.4	2.2
North-West	3.7	2.1	1.1	1.0	2.2
North-East	2.0	1.5	0.3	0.4	1.3
North-Central	1.1	1.0	0.5	0.4	0.8

Source: Canadian Travel Survey, pooled data 2001 – 2004

Destinations

Overall, the Vancouver, Coast & Mountains tourism region was the most common destination of Ontario travelers to BC, accounting for nearly two-thirds (66%) of all trips, followed by the Islands at 13%. There were some minor variations regarding travel destinations based on the purpose of the trip, with VFR travelers somewhat more likely to go to the Islands (17%), and personal travelers were more likely to visit the Thompson Okanagan as compared to the average (11% vs. 5%). Interestingly, a number of pleasure travelers who spent one or more nights in BC had the U.S. as the destination of their trip (7%). Finally, the Vancouver, Coast and Mountains region was particularly important for business travelers, as it was the destination tourism region for 82% of travelers in the category.

Destination tourism region by purpose of travel

	VFR	Pleasure	Personal	Business	Total
Vancouver, Coast & Mountains	62.9	57.6	55.6	81.5	65.8
The Islands	16.9	13.3	13.6	8.6	13.1
Thompson - Okanagan	4.5	7.3	10.9	2.0	5.2
B.C. Rockies	4.7	6.0	7.5	0.4	4.2
BC - Not Stated	2.4	3.7	5.0	3.9	3.4
Northern B.C.	3.8	3.7	3.8	2.2	3.3
Cariboo	0.0	0.2	0.0	0.0	0.1
U.S.	1.0	7.1	1.1	0.5	2.9
Alberta	3.5	1.0	2.5	0.9	1.9

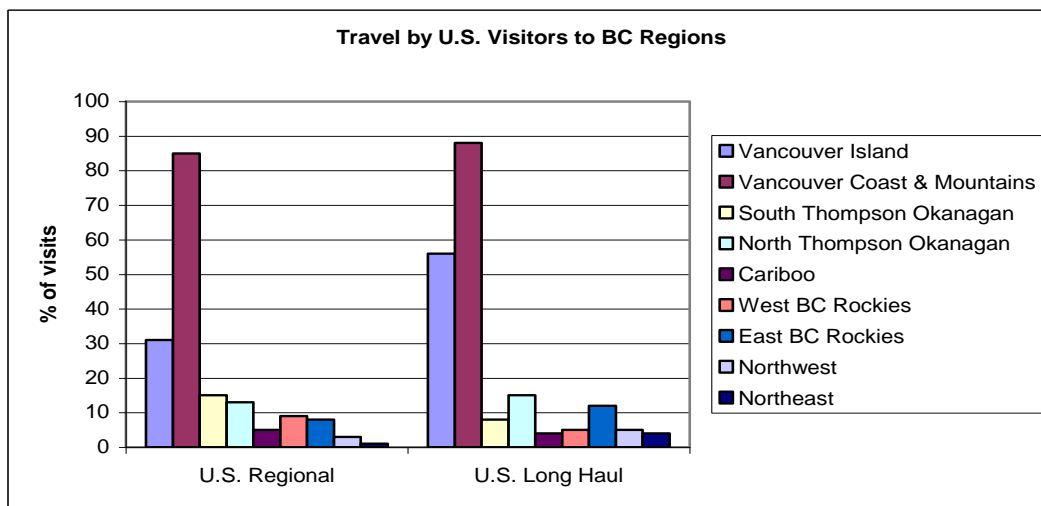
Source: Canadian Travel Survey, pooled data 2001 – 2004

United States

As with Canada, demographics favor a sustained increase in American frequent travelers in the longer term because of the same baby boom phenomenon, although other factors such as border and security issues may counter the positive effect of demographics. Frequent leisure travelers tend to be those with enough time and disposable income to travel. They are typically 45+, with older or grown children, in their peak earning years, and tend to travel as couples. Baby boomers are currently in their peak travel years and will continue to be for at least the next 15 years. In the U.S., the baby boom occurred between 1946 and 1964, so American baby boomers are 42 to 60 years old in 2006²².

Of American adults (18 years of age and older), 14.2% have taken at least one overnight pleasure trip to Canada in the last two years. The most frequently visited provinces were Ontario (8.0% of Americans visiting at least once), British Columbia (4.0%), and Quebec (3.0%)²³.

American visitors to BC tend to visit the Vancouver Coast and Mountains region, followed by Vancouver Island. This is to be expected as many Americans have little experience with BC and as a result, gravitate to the highest profile areas. As BC increases its American market, an opportunity exists to expand the areas that U.S. visitors travel in BC.

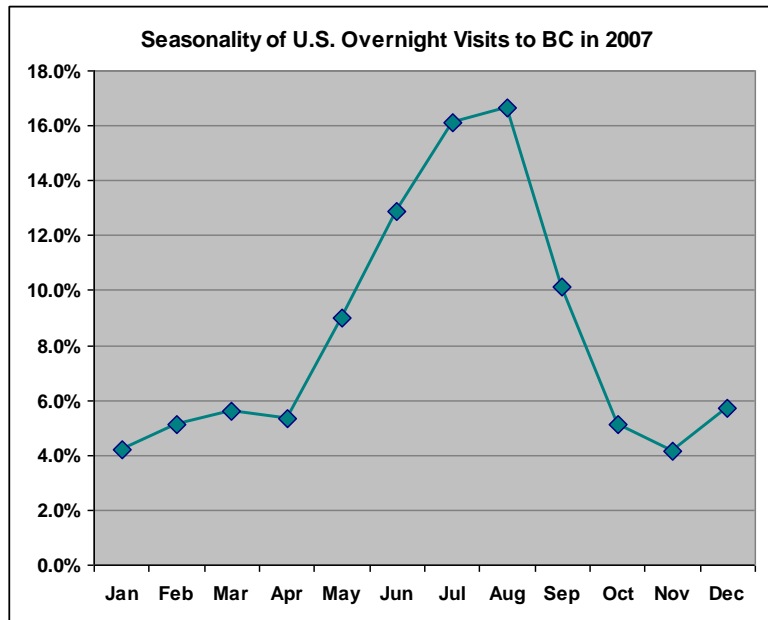


Source: Tourism BC Visitor Study, 1995/96

²² Source: *Boom, Bust & Echo 2000*, David K. Foot, 1998.

²³ Source: Travel Activities and Motivation Study, 2001, conducted for a consortium of Canadian provinces and the Canadian Tourism Commission.

American visitors to BC tend to visit in the summer months (56% of visits take place from June to September), with visits declining in the fall and increasing again in the winter to spring.



Source: Statistics Canada, compiled by Tourism BC

American travelers participate in a variety of experiences while on vacation. The most frequent activities by U.S. overnight travelers while on a trip (not specific to a trip to British Columbia) are:

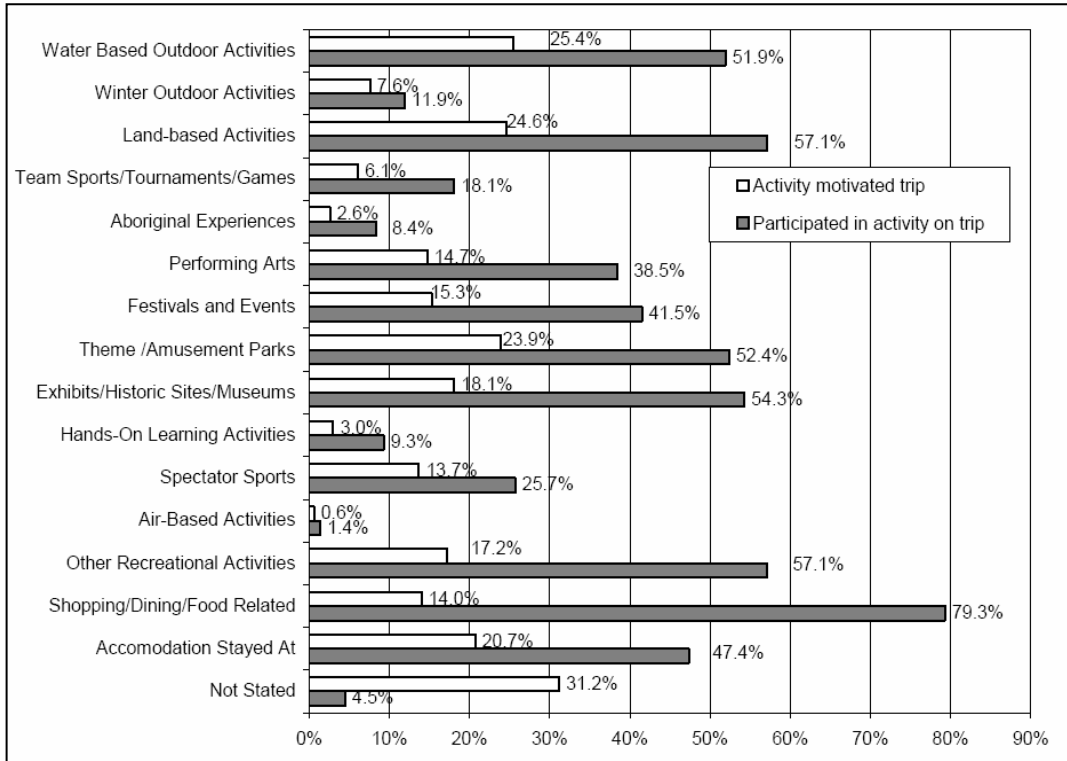
- Dining at restaurants that offer local ingredients and recipes
- Shopping for clothing, shoes or jewellery
- Going to a casino
- Going to an amusement park
- Strolling around a city to observe buildings and architecture

The activities that were usually the primary motivator of trips that included them are (not specific to a trip to British Columbia):

- Big-game hunting
- Package golf tours
- Motorcycling overnight touring
- Downhill skiing

The following table summarizes the activities performed by US citizens by participation and motivation on overnight trips in 2004-2005.

Activities Participated on Overnight Trips in 2004-2005



Source: Travel Activities and Motivations Study, 2006

Asia/Pacific

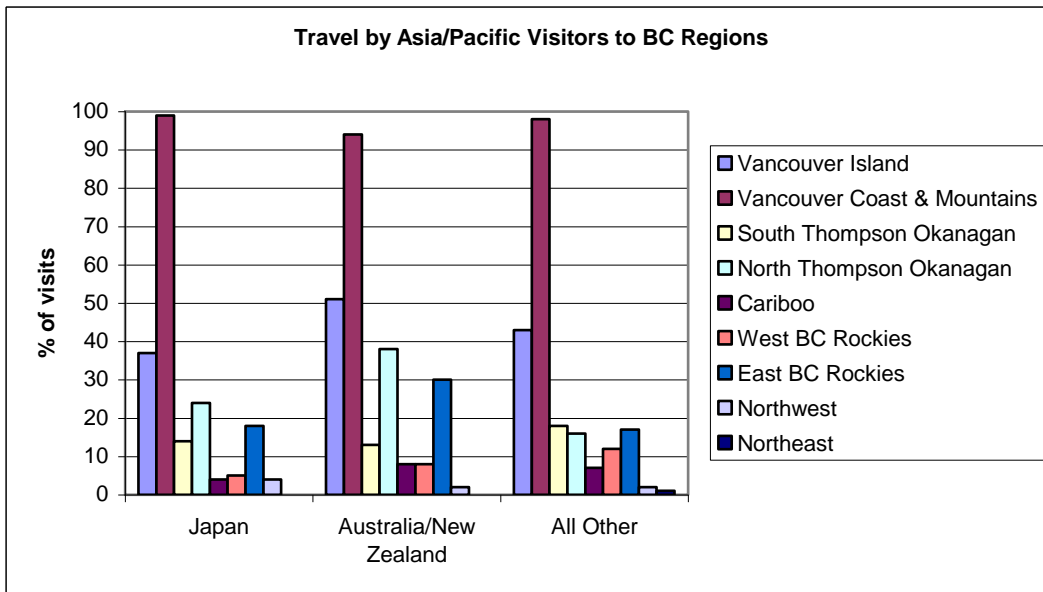
The most important markets from Asia/Pacific to BC are Japan (25% of Asia/Pacific visits) and Australia & New Zealand (18%). Japan is the second largest international market for BC.

Visitor Volume from Asia/Pacific to BC

Market Origin	Total 2006 Overnight Visitor Volume* (thousands)	% of Asia/Pacific
Asia Pacific	857	100%
Japan	215	25%
Australia & New Zealand	151	18%
South Korea	126	15%
China	94	11%
Taiwan	82	10%
Hong Kong	71	8%
Other Asia/Pacific	118	14%

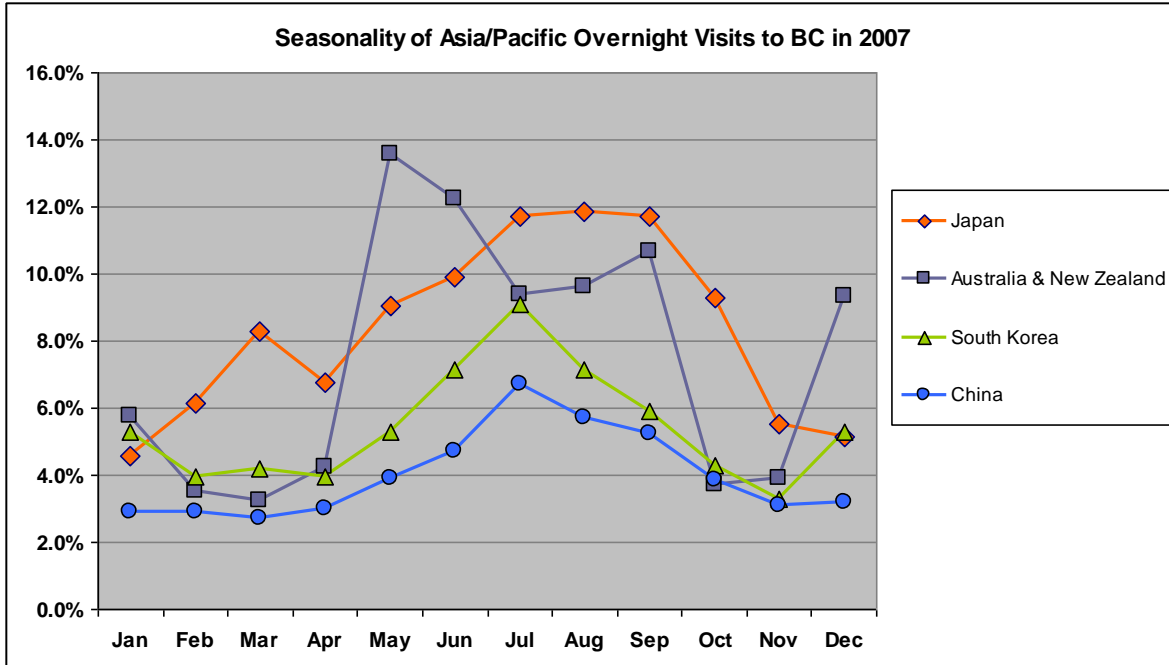
Source: Statistics Canada, compiled by Tourism BC

Asia/Pacific visitors to BC tend to concentrate their visits to Vancouver Coast and Mountains region, with those from Australia/New Zealand having more interest in exploring more of the province.



Source: Tourism BC Visitor Study, 1995/96

Visitors from Australia and New Zealand travel to BC predominately from May to September (62%), peaking in May. Japanese visitors come to BC primarily in the summer (45%), with some interest in skiing in the winter (24%)²⁴. South Korea and China are primarily summer and winter markets as well.



Source: Statistics Canada, compiled by Tourism BC

²⁴ Spring is defined as April and May, Summer is defined as June to September, Fall is defined as October and November, and Winter is defined as December to March.

Appendix #4 – List of Attendees

TOTA Region	
Name	Organization
Chuck Brennan	Kamloops Bike Camps and Tours
Ed Kruger	Monashee Mountain Biking
Michael Sherwood	Silver Star Mountain Resort
Lee Morris	Tourism Kamloops
Glenn Mandziuk	TOTA
Jennifer Horsnell	Tourism Kelowna
Robin Cyr	Shuswap Tourism
Wade Anderson	MTCA
Mark Woods	Regional District of Okanagan Similkameen
Phil McIntyre-Paul	Shuswap Trail Alliance
Mike Cambridge	Kelowna Mountain Bike Club Race Director
Anne Haight	Sun Peaks
Heather Boyd	Tourism BC
Richard Lewis	Tourism BC
Blair Baldwin	Pinnacle Consulting/Okanagan School of Business
KRT Region	
Name	Organization
Pat Williams	Dirt Tours
Deanne Stevens	Tourism Rossland
Marg Craig	Nelson & District Chamber of Commerce, Visitor Centre & Nelson Economic Development Partnership
Bob Dydra	Tourism Kimberly
Chris Dadson	Kootenay Rockies Tourism Association
Karen Cook	Kootenay Rockies Tourism Association
Lisa Cox	Ministry of Tourism, Culture and the Arts
Aaron Canuel	Ministry of Environment
Mark Crowe	Regional District of Central Kootenay
Stewart Spooner	Kootenay Columbia Trails Society
Amanda Ridgeway	Fernie Mountain Bike Club
Jeanie Dwyer	Slocan Valley Rails to Trails Society
Pat Wray	Nelson Cycling Club
Blair Baldwin	Pinnacle Consulting/Okanagan School of Business
Richard Lewis	Tourism BC
Heather Boyd	Tourism BC

VI Region

Name	Organization
Cam Fulton	Valhalla Tours, Cowichan Bay
Danica Rice	Valhalla Tours, Cowichan Bay
Martin Ready	Island Mountain Rides
Jeremy Grasby	Riding Fool Hostel, Cumberland
Mike Manara	Mt Washington
James Brown	IMBA
Amber Crofts	MTCA
Dave Petryk	Tourism Vancouver Island
Bobbi-Jean Goldie	Tourism Vancouver Island
Dan Brown	CVRD
Daniel Cammiade	Freal maps
Donna Green	MTBA
Martin Littlejohn	MTBA
Heather Boyd	Tourism BC
Blair Baldwin	Pinnacle Consulting/Okanagan School of Business

NBC Region

Name	Organization
Kevin Derksen	Burns Lake Biking Association
Brett Woods	Prince George Cycling Club
Virginia O"Dine	Tabor Mountain Ski Resort
Laurie-Anne Kosec	City of Prince George
Dorothy Ehrman	District of Mackenzie
Jason Griffin	District of Wells
Clint Fraser	Northern BC Tourism
Heather Boyd	Tourism BC
Blair Baldwin	Pinnacle Consulting/Okanagan School of Business

VCM Region

Name	Organization
Neil Winslow	Cache Creek Cycle Parts / Desert Spokes Cycle Society
Jean-Sébastien L'Heureux	Lytton & Fraser Canyon Trails Development
Branden Frandrich	Kumsheen Rafting Resort
Steve Harkies	Contractor
Greg Rector	Fraser Valley Mountain Bike Assn
Norbert Greinacher	MTCA
Alison MacDonald	Pemberton
Robin J Harvey	North Shore Mountain Bike Association
John Hawkings	MTCA
Gordon McKeever	Sea to Sky Trail

Todd Pope	District of Squamish Trails
Chris Winter	Big Mountain Bike Adventures
Frank Savage	Planner at Whistler
Mark Knight	Bear Back Biking
Rob McSkimming	Whistler
Danielle Kristmanson	Origin Design and Communication
Grant Lamont	Whistler Bike Guide
Lynn Chappel	Tourism Whistler
Kathleen Campbell	North Shore Tourism Association
Caroline Depatie	Capilano University (Mountain. Bike Program)
Dave Williamson	Cascade Environmental Resource Group
Mike Nelson	Cascade Environmental Resource Group
Martin Littlejohn	MBTA
Donna Green	MBTA
Blair Baldwin	Pinnacle Consulting/Okanagan School of Business
Heather Boyd	Tourism BC
Richard Lewis	Tourism BC
Nancy Radman	Tourism BC
Kathleen Harvey	Tourism BC
Kevan Ridgway	Tourism BC RDMO Vancouver Coast Mountains

Appendix #5 – Provincial Mountain Bike Tourism Working Committee

Name	Titles
Frank Savage	Planner, Resort Experience, Resort Municipality of Whistler
Todd Pope	Trails Coordinator, District of Squamish
Lynn Chappell	Manager, Partnership Marketing and Collateral, Tourism Whistler
Amanda Ridgway	Director, Fernie Mountain Bike Club
Deanne Stevens	Executive Director, Tourism Rossland
Mark Crowe	Planning Technician, Regional District of Central Kootenays
Mark Savard	Owner/Operator, Red Shreds
Mike Manara	Mountain Bike Manager, Mountain Washington Alpine Resort
Johnny Smoke	Owner/Operator, Bush Pilot Biking
Mike Cambridge	Director, Kelowna Mountain Bike Club
Phil McIntyre-Paul	Project Manager, Shuswap Trail Alliance
Kevin Eskelin	Recreation Officer (Northern BC), MTCA
James Brown	Representative for BC, International Mountain Biking Association
Dean Payne	Director, BC Bike Race
Andreas Hestler	Director, BC Bike Race
John Hawking	Provincial Trails Manager, MTCA
Chris Dadson	CEO, KRT

Appendix #6 – Best Models Competitive Review

Mountain Biking and the IMBA

The International Mountain Bicycling Association (IMBA) is a non for profit educational association whose mission is to create, enhance, and preserve trail opportunities for mountain bikers worldwide. The organization was founded in 1988 and it promotes responsible mountain biking, supports volunteer trail work, assists land managers with trail management issues, and helps improve relations among trail user groups. With the use of donations and grants the organization builds the biking industry through education, trail construction, volunteer support, management advice, and world leadership. The reason why the IMBA is of relevance is because it provides riders with assurance of the quality of the riding destinations and supplies information necessary when visiting a destination. Throughout the years this group has developed strong partnerships with federal land managers, environmental groups, the mainstream media, and other trail users. Some of these are stated below (IMBA, 2009):

- U.S. Forest Service
- Bureau of Land Management
- National Park Service
- Parks Canada
- U.K. Forestry Commission.
- Variety of state, local, and international agencies

The best models competitive review has appraised four mountain bike jurisdictions: Scotland (including 7Stanes), Moab Utah, Switzerland, and Oregon.

Scotland – Main Festivals

The Round Strathven 50 Cycle Challenge and Ultra Run

This is a riding charity event that has been held in mid August for the past six years and has risen over £20,000 to benefit both the Strathaven Scouts and Guides and various other local Scottish charities. The event involves a ride around the Strathaven area that is considered to moderately difficult as participants have the option of opting out at any stage of the ride and are provided with transportation back to the starting point. According to event organizers the number of participants continues to rise each year (Scottish Cycling, 2009).

Bike 500 Miles for Charity with Trailbrakes

Bike 500 Miles for Charity with Trailbrakes is a festival that aims to help individuals who are disabled or amputees in deprived parts of the world. The event takes place each year from the beginning of January to the end of December. This event attracts a high volume of serious mountain bikers because the ride is considered difficult and long in duration. The Bike 500 Miles for Charity with Trailbrakes is marketed to the public as an opportunity where mountain bikers can take part in a truly unforgettable challenge by riding Scotland's longest continuous mountain biking adventure over a total of 500 miles (Cycling Scotland, 2009).

3G Challenge Charity Mountain Bike Event 200

This event takes place each year at the end of August and involves cycling through Glen Affric Scotland in which participants can choose between a 48 and 20 mile challenge. It is promoted to bikers of all skill levels as it specifically states that it's challenging enough for the serious and technical riders, but also enjoyable for social and family riders. Prizes are given away to the 1st, 2nd, and 3rd place finishers at the end of the ride. The tag line that is used to promote this event is "Inspiring Adventures in the Natural Highlands". Each year that this event is held, it has experienced tremendous growth (Natural High Guiding, 2009).

The Wikerman Festival

The Wikerman festival takes place July 24th and 25th and involves riding the 7stanes trails. The festival also features: a world music and funk tent, classic Jamaican reggae, acoustic village, scooter tent, children's area, workshops, beer tent, crafts, camping and the highlight of the event is a 30 foot Wickerman who is sacrificed to the festival gods on the last night. This festival has gained a reputation within festival goers for being laidback, family friendly, eclectic and removed from the typical large corporate festivals scene (The Wikerman Festival, 2009).

The Nissan UCI Mountain Bike World Cup in Fort William

The Nissan UCI Mountain Bike World Cup consists of 12 events that take place in South Africa, Europe, Canada and Australia, from the months of April to September. These events are sponsored by Nissan and involve four types of biking: cross-country, downhill, marathon and four-cross. At Fort William the event is two days and takes place on the weekend of June 6th and is held around the Nevis Range ski area and the Leanachan Forest. After Saturday night the event relocates from the World Cup site at Nevis Range to a party at the fort in Fort William (Nissan UCI Mountain Bike World Cup, 2009).

There are several factors why Fort William was chosen as one of the hosts for this world tour. The terrain is considered to be ideal for the competition thanks to the UK Forestry Commission increased dedication to the development of the routes used for mountain biking. Furthermore, the Nevis Range Ski Company has invested into the event by building a downhill trail and hosting UCI Downhill World Cup and the first ever 4X World Cup in 2002. In 2003 it added a Cross Country World Cup and since then has become one of the classic events on the World Cup tour (Nissan UCI Mountain Bike World Cup, 2009).

There are two groups of participants for this event that include the riders and the spectators. The riders who compete at this event are at the highest level of mountain biking. They consist of famous names

and heroes as well as Olympic, World and Commonwealth Champions. Specifically the event attracts 400 competitors from around 30 nations. Therefore, as a result of the high level of talent that is involved with this event the level of spectatorship is also considered to be high. Spectators of the event not only witness amazing riding but they are also exposed to various mountain bike trade shows and expos, as well as music and entertainment. A large portion of the downhill courses is open for the public's enjoyment prior to the competition then re-opened to the public for about a week after the completion has concluded (Nissan UCI Mountain Bike World Cup, 2009).

The level of exposure that this event receives highly promotes Scotland as a desired destination for mountain biking internationally. There are more than 200 print, news, and photo journalists from over 25 nations that cover the event. The host broadcaster also delivers highlights of the event to a wide range of countries and a live webcast is available globally. Furthermore, BBC Scotland also broadcasts a 50 minute adventure show program promoting the event (Nissan UCI Mountain Bike World Cup, 2009).

World Mountain Bike Conference

The World Mountain Bike Conference is scheduled to take place in the summer of 2010 in Scotland. This event is a global discussion forum for public and private land managers as well as trail advocates regarding the economic, environmental, and socially sustainable development of the mountain biking industry. Specifically, the conference covers the topics of mountain biking development and management - trail building and management, economic regeneration, community involvement, conflict management, sustainability, public and private development and lastly public/private partnership.

The last conference in 2006 attracted over 430 delegates from 17 countries (World Mountain Bike Conference, 2009). There are six partners involved in organizing the conference and these include: Forestry Commission Scotland, Scottish Enterprise, VisitScotland, 7stanes, Dumfries & Galloway Council, and lastly Scottish Natural Heritage. By hosting this conference, Scotland is not only generating tourism revenue within the country but it is also strategically positioning itself as the leader for growth in the mountain bike industry (World Mountain Bike Conference, 2009).

Moab Utah – Festivals

Utah State Open Championship

The Utah State Open Championship is a one day event in July that caters towards family and single riders looking to experience the diverse terrain that Big Cotton Wood Canyon has to offer. This event is considered to be moderate in size as it brings in 350 riders of all skill levels from around the state. This event is organized by the team that runs Utah Mountain Biking.com and relies heavily on the support of volunteers (Intermountain Cup, 2009).

The Annual Moab Ho-Down Mountain Bike Festival

The Annual Moab Ho-Down Mountain Bike Festival is a popular 3 day festival that takes place each year on the Halloween weekend. This event is presented by Chile Pepper Bike Shop in Moab. It involves dirt jump competition, movie premiere, town tour, Super D race which is 5 miles in length, DH race, and a Halloween costume party with live music. The participants of this event involve 100 men and women

riders who are considered to be expert and open pro mountain bike riders. The trail and race format is not intended for beginner riders and they are strongly discouraged from registering.

There are several sponsors who support this event. These consist of: Marin Bicycles, Giant Bicycles, Brodie Bikes, Fox Racing Shox, Shimano, Quality Bicycle Products, Chile Pepper Bike Shop, and Coyote Shuttle of Moab. This event is also highly promoted in major mountain biking magazines in North America and continues to grow in popularity as more professional riders from various countries take part in the competitions (Moab Ho-Down Mountain Bike Festival, 2009).

San Rafael Swell Mountain Bike Festival

San Rafael Swell Mountain Bike Festival is held each year on September 26 to the 27. This grassroots festival is organized by the MECCA Mountain Bike Club and is geared towards single or family riders of all skill levels. Some of the unique experiences that this festival provides include riding next to expert riders, as well as having cook outs and sharing stories around a camp fire. There are 22 sponsors that support this festival and the level of promotion is considered to be low-moderate as it was difficult to come across information about it via the internet (Bike the Swell, 2009).

24 Hours of Moab Mountain Bike Race

24 Hours of Moab Mountain Bike Race has been organized by Granny Gear Production Inc for the past fourteen years. This is considered to be a world class event that takes place October 10th and 11th. The level of participation and spectatorship for this event is quite high. Specifically, there are 5,000 racers that make up 550 teams or solo riders. The sponsors of this event include: Ellsworth Handcrafted Bikes, IMBA, and Custom Blended Nutrition Solutions. The level of promotion for this event is considered high for the reason that it is marketed via the internet and is also published in several popular American mountain bike magazines (Granny gear, 2009).

Switzerland – Festivals

However, according to the organizers of the Nissan UCI Mountain Bike World Cup Competition the level of exposure that this event brings to Switzerland is tremendous. Specifically, within the last two years the organization has partnered up with Freecaster.tv, which is a well known online broadcaster. This partnership has lead to the event being watched by a total of 1.75 million viewers around the globe during the opening five rounds of the DHI and 4X, and four rounds of the XCO. Viewership of the event continues to rise rapidly as more and more people rediscover the excitement of mountain bike racing with over 400,000 people having tuned in for the live coverage. One of the main methods that Freecaster does this is by including special productions to support the races. These features include pre-race teaser clips, the Fox Racing Shox coursewalks, VholdR helmet cams, rider interviews, team profiles, technical explanations and regular highlight shows. All this entertainment is offered free of charge and is readily embedded by the event web sites, fan sites and main stream portals that are all eager to support the demanding interest in racing that the live coverage has spawned (Bike Magazine, 2009).

Oregon – Festivals

Mountain Bike Oregon

Mountain Bike Oregon is a large scale three day event that focuses on celebrating the mountain bike community in Oakridge/Westfir area. It is described as being the ultimate mountain bikers dream getaway. Specifically, it involves a community party, complete with meals, shuttles, and an expo of bike companies, demo bikes, contest and a free nightly beer garden. Furthermore, with the support of several sponsors, this event gives back to its host community by donating \$35,000 to local charities. This event brings about 300 riders from 20 states and continues to grow in popularity each year. In fact, registrations for both participants and spectators have been sold out for this year's event. The only restriction that this event does contain is that riders under the age of 14 cannot take part on the trails (Mountain Bike Oregon, 2009).

The Spring Thaw Mountain Bike Festival

The Spring Thaw Mountain Bike Festival is a two day event that is held in Ashland Oregon. This event is targeted towards riders of all ability levels at all ages. On the first night of the event there is a cross country race which is then followed by a kid's series race and ends off with a Post-Race Party at Standing Stone Brewing Company. The second day of the events involves a single track 1.7 downhill mile ride through Ashland watershed. This event is also supported by 28 sponsors that are made up of companies from the mountain bike industry as well as from the local community. One of the major motivators that helps drive both participants and spectators to the event consists of the fact that there is \$10,000 given away in both cash and merchandise. Unfortunately there was no information published about the number of event goers, however it was stated that it continues to grow in popularity each year (Spring Thaw Mountain Bike Festival, 2009).

Appendix # 7: Cyclist Welcome Logo

(Forestry Commission Scotland, 2009).



Appendix # 8: Cyclists Welcome Scheme

(Forestry Commission Scotland, 2009).

For serviced accommodation:

- A separate space is available for drying outdoor clothing and footwear so clothes can dry overnight
- A lockable covered shed for bike storage
- Details of the nearest cycle specialists
- A hot drink should be available on arrival
- A late evening meal (available until 8:00 pm) if there are no other meal providers within one mile. A late night snack is offered after 8:00 pm
- Early breakfast option from 7 am, or for very early leavers a tray the night before
- A packed lunch should it be requested by guest and their flask filled
- A supply of local cycling routes information, local public transport and a weather forecast for visitor reference.

For self-catering accommodation and hostels:

- A separate space available for drying outdoor clothing and footwear so clothes can dry overnight
- A lockable covered shed for bike storage
- Details of the nearest cycle specialist
- Information on local cycle routes
- A telephone number for information on the weather forecast
- Facilities for washing clothes or location of the nearest launderette
- Details of the establishment's Ordnance Survey co-ordinates (if outside a village).

Appendix #9: Best Marketing Strategy Components of BC Bike Park Marketing Plan

- Media Relations – broad exposure; cost effective; full experience; personal; good example is Decline at Sun Peaks
- Expand Emphasis on families; provide budget; storyboards and use integrated trail map/guide for media
- Online Marketing – one collective mountain bike brand web site divided into product categories/regions
- Create strategic alliances with tourism operators including air
- Engage in social networking sites popular with targets (PinkBike; NSMB; Hello BC)
- Engage in promotions to drive business to website through contests; media; links to other prominent tourism sites; Google ad words; resort websites; cross promote through key Festivals such as Crankworx

Market Research – need to understand targets needs and behaviours

Appendix #10: 7stanes Map

(Forestry Commission Scotland, 2009).





Appendix #11: Perceptual Map of Moab Utah

(Travel Utah, 2009).



Appendix #12: Overall SWOT of Leading Jurisdictions

Strengths of BC Mountain Biking

- Leading jurisdictions have set SMART (Specific, Measurable, Achievable, Realistic and Timed) objectives to gain strong focus in developing mountain biking in their area. For example, Scotland Tourism has set the goal to grow the industry by 50% within the country by 2015
- Building a strong brand and continuously promoting it within the industry through effective mediums such as the internet and is a major key success factor
- Synchronized systems between local governments and business organizations further enhance visitors experience because it helps to ensure that visitors have easy access to all the necessary information and services needed
- Providing a diversity of trails that meet the needs of both the beginner and advanced rider allows a destination to reach a wider target market within the industry
- Hosting festivals that provide exceptional riding and a high degree of novelty enhances a country's ability to better compete
- Country's who are the host to larger scale events are strategically positioning themselves as leaders within the industry in a sustainable manner. Specifically, larger scale events receive greater publicity on an international level and have a greater rate of return for repeat visits
- A cooperative effort between the government and the tourism sector enhances the level of commitment for trail improvements and the development of riding centres.
- Incorporating a country's heritage, culture, and natural landscape enhances the level of novelty in an area and gives a destination a competitive advantage over rivals.
- Having the private and public sector work together in true partnership by pooling resources to establish quality standards and facilities for mountain biking enables the ability for a destination to compete more aggressively
- Advanced websites that are user friendly and provide detailed information about trail infrastructure and allow for customized trip planning help pull in more riders to a destination.
- Translating websites into several main languages is also allows for greater reach of a market.
- Jurisdictions that give back to their local communities in terms of hosting events for charities creates stronger acceptance among community members to invest in growing the sport locally.
- Broadcasting events live through mediums such as Freecaster creates a high level of exposure to both events and the host country.

Weaknesses of BC Mountain Biking

- Lack of promotion through various marketing mediums such as the internet and magazines sets back the ability to attract visitors due to lack of exposure
- Lack of a brand or logos prevents riders from associating important factors in a riding destination such as quality and novelty.
- Not establishing strong SMART objectives and goals prevents a destination from reaching full potential in promoting mountain bike riding and becoming a leader within the industry.
- Lack of dedication and cooperation from the government prevents future growth and development of the sport within an area.

Opportunities of BC Mountain Biking

- Developing partnerships both in and outside country borders help establish strong promotion for a destination and provides greater service and information for rider
- Increasing the level of festivals and events to an area brings in stronger promotion to an area.

Threats of BC Mountain Biking

- Economic crisis has had an impact on mountain bike tourism as more riders can't afford as much leisure travel
- Other outdoor recreational sports may become substitutes for mountain biking.

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