

Northern BC Mountain Bike Recreation and Tourism Development Strategy



DNA

David Nairne + Associates Ltd



ACKNOWLEDGEMENTS

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Omineca Beetle Action Coalition	City of Terrace	Town of Smithers
Tourism Smithers	Village of Burns Lake	District of Houston
District of Fort. St. James	District of Mackenzie	RD of Bulkley Nechako
RD of Kitimat Stikine	RD of Fraser Fort George	Village of Telkwa Lake
Village of McBride	Northern Development Initiative Trust	

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Cover Photo: Nicolas Teichrob



December 4, 2014

Martin Littlejohn, Executive Director
Western Canada Mountain Bike Tourism Association
martin@mbta.ca

Re: Northern BC Mountain Bike Strategy

Dear Martin,

Northern BC Tourism is pleased to be a partner in this project and is looking forward to supporting the implementation of strategies outlined in this report. The people who live here are passionate about the region and it shows in everything they do. We are greatly encouraged by the growth of mountain bike tourism in the province and by what we see happening in our own communities:

- Interest in mountain biking amongst Northern BC residents is generating our own unique Northern brand of mountain bike culture and motivating intra-regional travel.
- The quality of the trails being developed and the diverse experiences they offer are world class - from all-day epics to technical trail features, flow trails to big mountain descents.

We feel Northern BC is an excellent mountain biking locale. Our diverse terrain and landscapes - from the Rockies to the Coast - offer visual inspiration, and the welcoming communities along the route are no more than two hours apart.

In the north, the willingness to collaborate is second nature and will help access sustainable funding for worthwhile projects. Projects that will attract more people to mountain biking and ultimately bring more visitors to the region.

I encourage you in your efforts to create unique experiences that will excite local interests and allow us to spread the message about the amazing riding opportunities found in the region.

Sincerely,

Clint Fraser, Interim CEO
Northern British Columbia Tourism

NORTHERN BRITISH COLUMBIA TOURISM ASSOCIATION

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*Western Canada
Mountain Bike Tourism Association*

December 2014

To the mountain biking stakeholders in Northern BC:

British Columbia has long been a major contributor to the world of mountain biking and the province has become a world class destination for outdoor recreation and adventure tourism. The diverse trails and inspiring landscapes that are cherished by so many that call this place home have caught the attention of riders from around the globe. Mountain biking is a growing opportunity for communities across BC with many social and economic benefits attached to it. What we ride and how we ride may have changed over the years; however, as mountain biking evolves it continues to lead us to a better and more rewarding experience that encourages participation from a widening spectrum of ages and abilities.

Northern BC is the new frontier for mountain biking in the province; one with limitless potential. The MBTA encourages stakeholders to work together to create unique world class riding experiences that highlight the character of the places and the people in the region. This collaborative effort will involve many including local residents, municipal and regional governments, land managers, as well as local and regional destination marketing organizations each bound by these guiding principles:

- *Support* the efforts of the grassroots, for they are the stewards of the trails and help build community pride.
- *Manage* the resource sustainably to ensure high quality experiences for residents and visitors alike.
- *Promote* awareness through multiple channels that will lead to new economic activity throughout the region.

The strategies recommended in this report are designed to build onto the work that a number of communities have already accomplished and will identify key steps and critical success factors that all stakeholders need to address in order to foster a vibrant mountain bike culture and establish Northern BC as a diverse mountain biking destination.

On behalf of the MBTA, we look forward to continuing to support the development of mountain bike tourism in Northern BC!

Sincerely,

Martin Littlejohn

Executive Director, Western Canada Mountain Bike Tourism Association (MBTA)

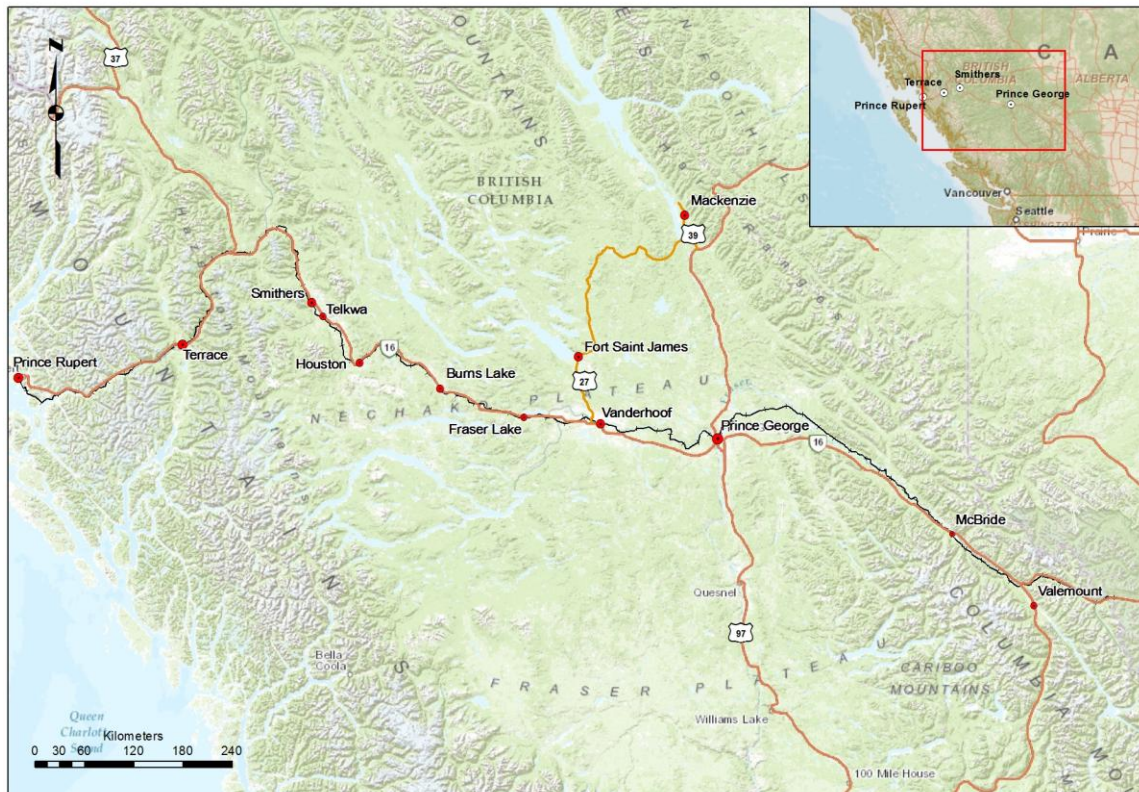
EXECUTIVE SUMMARY

British Columbia is the spiritual home for mountain biking with thousands of kilometers of trails and riding experiences that attract riders from around the world. Over the past several decades, the sport has grown from an exclusive and high-risk endeavor, practiced by a handful of extreme riders on illegal trails, to a recreational pastime enjoyed by people of all ages.

Northern BC and the regions within the Yellowhead Corridor represent a vast range of geography and a diversity of landscapes that present significant opportunities for outdoor recreation and adventure tourism. Within a distance 1,000km between Valemount and Terrace, the communities along the Yellowhead Highway are actively building and investing in trails and recreation developments that have the potential to establish the region as one of the top destinations for mountain biking in the world. Within a few hours of driving between each community, the region possesses a broad diversity and variety of landscapes from mountains and vast river valleys to expansive forests with stunning views, wildlife, solitude, as well as welcoming and friendly communities with dynamic cultures and rich histories.

Northern BC has the potential to become a significant destination for mountain bike recreation and tourism. Mountain Bike Travellers are seeking opportunities and destinations that can provide a broad diversity and variety of riding experiences that the communities of northern BC can best provide through collaboration.

Northern BC Mountain Bike Recreation & Tourism Development Project Area



The development of a robust and viable mountain bike recreation and tourism sector faces significant challenges within the Yellowhead Corridor and Northern BC. The region must compete with far more established communities and destinations throughout the province that have built up their infrastructure, and have developed strong brands as quality destinations. Many of these have effective marketing and promotional strategies that attract visitors from around the world.

The Northern BC Mountain Bike Recreation and Tourism Development Strategy was developed as a joint effort between the Western Canada Mountain Bike Tourism Association, Northern BC Tourism, and the Regional Districts and communities across the Region. The objective was to explore and assess the viability for the communities along the Yellowhead Highway from Valemount to Terrace, to collaborate and promote the region as a destination for mountain bike recreation and tourism.

Summary of Key Finding & Highlights

The following report provides detailed analysis of the mountain bike tourism market, trends, projections, as well as a clear understanding of the profile of mountain bike travellers and the implications for northern BC. The following provides an overview and summary of the key findings:

Mountain Bike Recreation has significant social and community benefits – providing significant recreational opportunities for residents and enhancing the livability and sustainability of communities

Mountain Bike Tourism can generate significant economic benefits – the sector provides a significant return on investments from trail building and infrastructure, generating new revenues and taxes, employment and economic opportunities

Mountain bike tourism is a growing and lucrative market – the sector has grown consistently in recent years and is projected to continue doing so

Mountain bike travellers are a valuable tourism market – they are highly motivated to travel and are prepared to invest their time and finances in order to have high quality and memorable mountain bike and trail riding experiences

Northern BC has the potential of becoming a world-class destination for mountain bike recreation & tourism – the region possesses all the elements required for mountain bike recreation and tourism including geography, climate and growing trail systems that are appealing to mountain bike recreationists and travellers

Familiarity & awareness of Northern BC as a destination is growing – more people are hearing about the region and expressing a growing level of interest. With the right investments and marketing and promotion, Northern BC could become established as a destination attracting riders from around the world

Regional collaboration works – those regions throughout BC and internationally that have created regional development, branding and marketing strategies are experiencing substantial growth in the number of riding experiences, volumes of visitors, economic activity, and employment

Summary of Development Strategies

The following table summarizes the key strategic actions with their recommended priority. Ultimately, consensus will be needed among the key stakeholders as to which strategies to address first based on available resources, local capacity and the logical sequence of events.

Strategic Action	Recommended Priority	Strategic Lead
Primary Strategic Action Plan ➤ Support the Growth of Mountain Bike Recreation	Highest Ongoing Priority	Communities, Municipal
Regional Collaboration Strategies ➤ Create a Regional Branding Strategy ➤ Create a Regional Trails & Mountain Tourism Group ➤ Coordinate Events & Festivals across the Region ➤ Develop Regional Race Series & Events ➤ Develop & Implement a Regional Marketing Strategy ➤ Key Messages to Make Northern BC an Appealing Destination for Mountain Biking	Short-term Priority Medium-term Priority Medium-term Priority Medium-term Priority Medium-term Priority Ongoing Priority	NBT/MBTA NBT/MBTA/Communities NBT/MBTA/Communities Communities NBT/MBTA NBT/MBTA
Community Strategies ➤ Build Capacity within Communities ➤ Establish Clear Visions & Planning for Trails & Mountain Bike Recreation ➤ Foster Mountain Bike Culture & Community ➤ Build Mutually Beneficial and Supportive Partnerships ➤ Develop Sustainable Mountain bike Trails & Supporting Infrastructure ➤ Support Local Business to Service & Cater to the Mountain bike Recreation & Tourism Market ➤ Ensure Trail Networks are Maintained ➤ Monitor, Evaluate & Report on the Social & Economic Impacts & Benefits	Ongoing Priority Ongoing Priority Ongoing Priority Ongoing Priority Ongoing Priority Ongoing Priority Ongoing Priority Ongoing Priority	Communities, Municipal Communities, Municipal Communities, Municipal Communities, Municipal Communities, Municipal & Regional District NBT/MBTA/Communities Communities, Municipal & Regional District Communities, Municipal & Regional District
Regional District Strategies ➤ Trail Plans & Ensure Sustainable Access to Lands ➤ Regional Trail Coordinators ➤ Regional Trail Maintenance ➤ Financial Support & Fund-raising	Short-term Priority Medium-term Priority Medium-term Priority Ongoing Priority	Regional Districts Regional Districts Communities & Regional District Regional District

TABLE OF CONTENTS

ACKNOWLEDGEMENTS	i
EXECUTIVE SUMMARY	i
Regional Collaboration Strategies.....	iii
Community Strategies	iii
Regional District Strategies.....	iii
TABLE OF CONTENTS.....	iv
MOUNTAIN BIKE RECREATION & TOURISM DEVELOPMENT STRATEGIES	1
Primary Strategic Action Plan	5
Regional Collaboration Strategies	7
Community Strategic Action Plans	12
Regional District Strategic Action Plans.....	19
PART ONE PROJECT OVERVIEW.....	22
1.1 Document Overview	22
1.2 Background & Context.....	23
1.3 Project Goals & Objectives	24
1.4 Participating Communities & Stakeholders.....	25
1.5 Project Activities & Outcomes.....	26
PART TWO MOUNTAIN BIKE RECREATION & TOURISM DEVELOPMENT.....	30
2.1 Mountain Bike Recreation in British Columbia	30
2.2 Social Benefits of Mountain Bike Recreation	34
2.3 Amenity Migration & Livable Communities	35
2.4 Mountain Biking as a Recreational Activity	36
2.5 Developing Mountain Bike Tourism Destinations	39
2.6 Best Practices.....	43
2.7 Mountain Biking BC	48
PART THREE MOUNTAIN BIKE TOURISM MARKET ASSESSMENT.....	54
3.1 Mountain Bike Tourism Market Potential	54
3.2 Mountain Bike Recreation & Tourism as an Economic Generator.....	55
3.3 Mountain Bike Travellers Profiles.....	58
PART FOUR ASSESSING THE MARKET OPPORTUNITIES FOR NORTHERN BC	71
4.1 Northern BC as Mountain Bike Recreation & Tourism Destination	71
4.2 Potential Target Markets for Northern BC	76

PART FIVE	REGIONAL COLLABORATION.....	81
5.1	Summary of Findings	81
5.2	Regional Case Studies	88
5.3	Regional Collaboration in Northern BC	98
PART SIX	DEVELOPING MOUNTAIN BIKE RECREATION & TOURSIM IN NORTHERN BC.....	103
6.1	Key Challenges for Development	103
6.2	Market Readiness Assessment	106
6.3	Regional Profile & SWOT Analysis	108
6.4	Community Profiles, Infrastructure Assessment & SWOT Analysis	110
REFERENCES	135
APPENDIX A – STAKEHOLDERS SESSION SUMMARY NOTESError! Bookmark not defined.		
APPENDIX B – NORTHERN BC MOUNTAIN BIKE TOURISM FOCUS GROUP REPORTError! Bookmark not defined.		
APPENDIX C – REGIONAL ENGAGEMENT & SITE VISIT TOUR REPORT ...Error! Bookmark not defined.		
APPENDIX D – MARKET ASSESSMENT & LITERATURE REVIEW REPORT Error! Bookmark not defined.		
APPENDIX E – REGIONAL ENGAGEMENT FOLLOW-UP QUESTIONNAIRE REPORTError! Bookmark not defined.		
APPENDIX F – MOUNTAIN BIKE TRAVELLERS SURVEY REPORTError! Bookmark not defined.		

MOUNTAIN BIKE RECREATION & TOURISM DEVELOPMENT STRATEGIES

The following section outlines the strategic action plans for supporting the development of a robust and vibrant mountain bike recreation and tourism sector in the Yellowhead Corridor and throughout Northern British Columbia.

Goal Statements

Through the Northern BC Mountain Bike Tourism Initiative community engagement activities, the project team identified three overall goal statements to guide the development of mountain bike recreation and tourism in Northern BC.

1. **Sense of Community & Mountain Bike Culture** – Communities throughout the region will possess strong and flourishing sense of community and culture as destinations for mountain bike recreation and tourism
2. **High Quality Trails & Riding Opportunities** – Communities throughout the region will possess high quality trail networks that will support recreation and economic development
3. **Awareness of Northern BC as Mountain Bike Destination** – Northern BC will be known as a world-class mountain bike recreation and tourism destination

What is the Mechanism? How will the Plan be Implemented?

The following provides an outline and discussion of the key actors, catalysts and champions and their potential roles and contributions towards making the vision for mountain bike recreation and tourism development in Northern BC reality.

Catalysts & Champions

Successful and sustainable mountain bike recreation and tourism development is a community oriented and driven process involving community champions, individuals and groups who are passionate about the sport and committed to developing marketable tourism businesses and experiences. There are a number of key stakeholders groups that can make significant contributions to the development of mountain bike recreation and tourism development in Northern BC and the implementation of this strategic plan.

These include the following:

Northern BC Tourism

Northern BC Tourism has been a strong supporting partner throughout the Northern BC Mountain Bike Tourism Initiative and will take a central role in the implementation of the Strategic Action Plans. A stakeholder based not-for-profit society, Northern BC Tourism is governed by a private sector board of directors who represent businesses and community tourism interests throughout the region. Northern BC Tourism provides assistance for communities to connect with consumers from around the world through a variety of marketing programs. Northern BC Tourism will be able to assist with developing and implementing marketing and advertising campaigns as part of the tourism development strategy.

Western Canada Mountain Bike Tourism Association (MBTA)

The MBTA is a unique non-profit organization committed to establishing mountain biking as a safe and sustainable tourism experience in Western Canada, perhaps the most scenic and challenging mountain bike destination on the planet. MBTA works collaboratively with a network of businesses, bike clubs, communities, resorts, and government agencies to achieve its goals.

The vision of the MBTA is *“to have Western Canada recognized for its world class sustainable trails and abundant mountain bike experiences that are supported by enthusiastic community and resort operators offering high quality services”*.

The MBTA operates mountainbikingbc.ca, which is one of the central platforms for promoting and marketing mountain bike experiences in British Columbia. The MBTA also provides a number of promotional and marketing services to promote awareness of mountain bike destinations, events and festivals throughout the province.

The MBTA is prepared to work with Northern BC Tourism and the communities throughout the region to develop and promote the mountain bike tourism experiences.

Regional District & Municipal Governments

Local and regional governmental agencies have a critical role to play in the implementation of this strategy and for supporting mountain bike recreation and tourism development generally. Most critically, this can include identifying and setting aside lands for the development of trails and tourism infrastructure in community planning processes. It can also include integrating mountain bike recreation and tourism development in community plans and supporting the creation of a strong sense of community and mountain bike culture by supporting local clubs efforts to build trails and increase participation in the sport. Undertaking the development of trails plans at both the regional district and district/municipal levels that establish a clear vision for mountain bike recreation and tourism can establish a critical foundation to support long-term sustainable development. Local and regional governments can also provide technical support and assistance in securing the appropriate permitting and legally sanctioning of trails, insurance, and fundraising through grants as well as tax revenues to support trail development and maintenance. Furthermore, Regional District and Municipal governments can also provide operational assistance by creating regional trail maintenance crews that can support the efforts of local volunteers in maintaining trail networks.

Tourism & Economic Development Agencies

Local tourism and economic development agencies can make a significant contribution to the development of mountain bike recreation and tourism. Understanding that recreational opportunities can attract professionals, investment and new economic activity to communities, these groups can provide critical support to local user groups and municipal administrations. Local tourism and economic development agencies are highly useful in building support and assistance among the local business community as well as for promoting tourism services. They can also play an important role in assisting local businesses and tourism operators to recognize and understand market opportunities and cater to the mountain bike tourism sector.

Local Advocates & User Clubs

Local mountain bike clubs, trail builders and riding enthusiasts are the bedrock and foundation upon which a mountain bike recreation or tourism sector can flourish. These groups and individuals take on many critical roles including advocacy, planning, sport development, trail building and design as well as creating the overall mountain bike culture in the community.

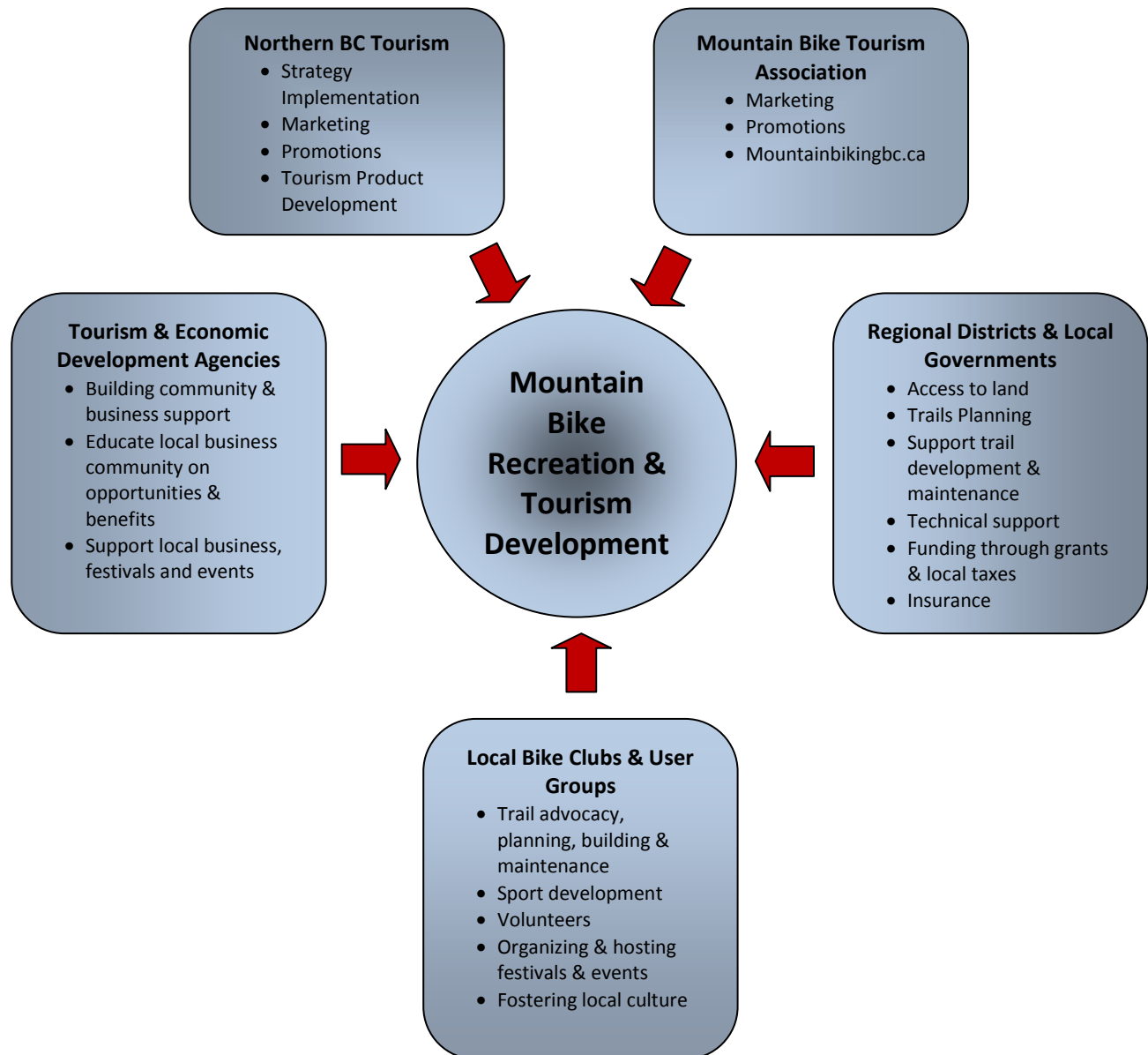
Implementation

The implementation of the Strategic Action Plans outlined below will necessitate each of the stakeholders groups described above collaborating and supporting the common goals of developing mountain bike tourism and recreation throughout Northern British Columbia. A critical step will be to bring the stakeholders together to discuss and plan the implementation activities going forward and to consider the creation of a regional mountain bike recreation and tourism committee or association.



Wooden Feature in Burns Lake

Champions & Catalysts Chart



Levels of Collaboration

The Strategic Action Plans are divided into three categories representing different levels of development and collaboration:

Community Level – each individual community participating in the project, as well as any future communities that opt to join the collaborative effort and develop mountain bike recreation and tourism opportunities

Regional District Level – there are three Regional Districts that are participating in this initiative including the following:

- Regional District of Fraser Fort George
- Regional District of Bulkley-Nechako
- Regional District of Kitimat-Stikine

Regional Level - Yellowhead Corridor & Northern BC Tourism

Primary Strategic Action Plan

Support the Growth of Mountain Bike Recreation

Mountain bike tourism is a direct result of the development of mountain bike recreation at the community level. There is no such thing as a successful mountain biking tourism destination that did not start off as a community with a strong culture around mountain biking and trails. In addition, though mountain bike tourism has been shown to provide significant economic impacts, the social and community impacts of mountain bike recreation are substantial and provide significant benefits to communities.

Supporting the growth of mountain bike recreation in and among the participating communities represents the most immediate opportunity to enhance the market opportunities for tourism.

The primary and central key strategy for all of the participating communities throughout the region should be to focus on trails and mountain bike recreation as a community asset and driver of social development.

Recommended Action Steps:

- a) **Support the development of local bike clubs and user groups** – critical for the development of mountain bike recreation, these groups provide many services including trail advocacy and development, volunteers, as well as growing the level of the participation in the sport in the community. Types of support can include the following:
 - Provision of resources such as grants

- Community facilities for meetings & operations (office space)
- Community coordinators (i.e. local government staff)
- Assistance with writing grants and fundraising

b) Support & encourage new participants in mountain bike recreation – this can be achieved through a variety of methods including:

- Ensure the development of progressive trail systems – this includes ensuring sufficient number of riding opportunities for beginner and intermediate level riders as well as continuing to provide challenges as riders improve their technical abilities
- Bike skills parks – provide opportunities for instruction and skill development and safe places for young & new riders
- Initiate programming to support new users, particularly youth and women – riding clinics, bike maintenance workshops, etc
- School programs such as Cycling BC's IRIDE School Program



Photo: John Wellburn

Regional Collaboration Strategies

The following strategies outline the goals and actions steps that can be undertaken at the regional level including all of the communities participating in the Northern BC Mountain Bike Tourism Initiative.

These include the following:

Create a Regional Branding Strategy

Developing a strong brand that captures the unique qualities of the mountain bike experience that will appeal to the relevant target markets for northern BC will be a critical step towards developing the region as a destination for mountain bike recreation and tourism. Having a strong brand will provide conduit for communities throughout the region to position themselves and capture the attention and imagination of potential visitors within a highly discriminating market. Good brands reflect the needs and wants of the potential visitors and the experiences they are looking for. It provides a story for how the services and riding opportunities that are available throughout the region will address their needs and provide the experiences they are seeking.

It will be important to create an overall regional brand, while allowing for each community to develop and promote their unique characteristics that will ultimately support and contribute to the regional brand.

Recommended Action Steps:

- a) **Branding Workshops** - initiate a series of workshops across the region including each of the participating communities to develop a brand for the region, as well as to explore how the character of each community can contribute to and support the regional brand.
- b) **Implement the Branding Strategy** - ensure the regional brand is used in all marketing and promotional materials for the region

Create a Regional Trails & Mountain Bike Tourism Group

The development of a regional group that could provide coordination, advocacy, and support for local groups could be a longer-term strategy for encouraging and supporting the development of mountain bike recreation and tourism throughout the region. A regional group would provide a forum for coordinating activities throughout the region as well as marketing and promotions. Such a group could also potentially provide support and capacity development for smaller communities that otherwise may not have the ability to develop their assets.

Recommended Action Steps:

- a) **Form an informal committee of community and user group representatives from across the region**
– this group could become more formal as the initiative proceeds and the need for more structure evolves

- b) **Solicit the participation of representatives from key stakeholder groups from participating communities** – this should include volunteers from local trail and user groups, tourism and economic development agencies and municipal and regional district representatives
- c) **Organize a regional symposium or forum** – this could be a one day planning or strategy session held once or twice a year that would involve bringing stakeholders from across the region together to find solutions to common issues

Coordinate Events & Festivals across the Region

Currently a number of the participating communities are developing or are operating mountain bike races, events and festivals that are growing in popularity and beginning to raise awareness of the region and attract riders. Currently there is little to no coordination of the events between the communities throughout the region. Collaborating to establish a schedule of events along with marketing and promotions would enhance the return on investment in terms of costs while allowing the region to attract more visitors and raise awareness of the events and the region as a whole.

Recommended Action Steps:

- **Use the regional committee to arrange and coordinate events and festivals to the greatest extent possible.**
- **Promote the schedule through various forum such as local and regional websites, Cycling BC, Mountain Bike BC, Pinkbike, etc**

Develop Regional Race Series & Events

Creating a regional race series can help strengthen the region's brand. It adds a new dimension to the efforts to showcase the quality of the riding experiences and demonstrates the depth in the development of the sport across the region. Official standings help keep followers engaged in the series resulting in a regional champion for each age and skill category.

Staging a race series requires a significant level of collaboration among the communities involved. This can be facilitated through contracted support from a professional race organizer. Cycling BC is an important resource for competitive events. There are other private organizations that may also be able to provide key logistical support for course layout, marshalling and timing. BC Bike Race, BC Enduro Series Island Cup Series, and Single Track 6 are examples of event organizers that work closely with communities to create unique events on a regional level.

Recommended Action Steps:

- **Determine the level of interest among communities throughout the region** – to determine if there is sufficient interest from enough communities to create a regional series event and the trails and riding discipline(s) to be featured.

- **Contact professional event organizers** – to determine cost for service and what opportunities they can offer in terms of sponsorship, promotion and media support.

Develop & Implement a Regional Marketing Strategy

The development and implementation of a regional marketing strategy is a key action that communities throughout the region can collaborate on to enhance mountain bike recreation and tourism. Each of these recommended action steps can be approach through collaboration with Northern BC Tourism and the Mountain Biking BC (MBTA).

As noted in Part 3 of this report, mountain bike travellers put the greatest emphasis on personal recommendations regarding potential destinations, followed closely by mountain bike related websites such as MountainbikingBC.ca, Pinkbike, and local mountain bike oriented websites. The least preferred sources include generic tourism websites or print materials. It is strongly recommended that tourism agencies collaborate and partner with mountain bike oriented sites and local clubs to disseminate information and raise awareness of the region. Other key media include the development of film and photo images of potential riding experiences.

Recommended Action Steps:

- **Collaborate with the MBTA through the Mountain Biking BC program to Highlight Northern BC as a Destination** – this is a well-established program that reaches significant number of mountain bike travellers. In order to participate in the program, communities must become members of the MBTA and pay an annual membership fees. This would involve highlighting the Yellowhead corridor as a regional destination and highlighting specific trail and trip itineraries, trip competitions as well festivals and events. MountainbikingBC.ca will be releasing a promotional video of the Yellowhead Corridor in the near future which should significantly raise awareness of the area
 - **Provide Content** – providing high quality pictures and information on trails, trail loops and potential trip itineraries (See Focus Group Report for potential trip itineraries developed by the participants).
 - **Mountain bike videos** - Supporting local riders and videographers to develop films on riding in each community can also be an excellent source of cost effective content
- **Implement a promotional campaign through Pinkbike.com** – one of the largest mountain bike related websites in the world, Pinkbike receives up to 1 million views monthly. A promotional campaign would involve the placement of advertisements on the website with a specific call to actions as well as stories and articles and other forms of content (videos, photos)
- **Marketing to Key Target Markets (Yukon, Alaska, Alberta)** – as outlined in Part 4.2, there are specific target markets that represent significant potential for the Yellowhead Corridor and Northern BC. Developing marketing campaigns to target these areas will be a critical step towards building awareness and attracting new visitors to the area. This could include some of the following:

- **Participating in trade shows & exhibits** in Alberta, and other areas of BC and the lower mainland
- **Billboards and print adds in specific areas where there are significant volumes of mountain bike travellers** such as the Sea to Sky Corridor, the lower mainland, Highway 16 between Jasper & Edmonton
- **Host promotional trip competitions** – this has been a very successful tactic employed by the MBTA to raise awareness for specific areas of BC and the province generally. It involves hosting competitions whereby interested mountain bike travellers enter into a contest to win a trip to a specific area of the province.
- **Media Trip** – invite media to visit and develop stories on riding opportunities throughout the region
- **Invite Manufacturers to use trails in the region for product launch locations** – companies are often seeking new locations to feature new products, which can simultaneously promote the area in which the product launches are set
- **Develop & Implement a Social Media Strategy** – social media is assuming a larger and exceptionally important role in marketing and promotions. Having a social media strategy in place can assist destination to raise their profile and attract interest in the region
- **Develop a regional trails ‘app’ for smart phones** – many Destination Management Organizations are developing applications to provide ongoing and timely information and resources to Travellers who are increasing savvy with internet and technology
- **Provide high quality trail maps and information – trail types, elevations, etc.** Although, many areas use the sale of trail maps and information as a fundraiser, providing the information free of charge to visitors can be an important marketing and promotional tool. Additionally, mountain bike travellers are looking for very specific and detailed information regarding trail types, riding styles, topography, history, culture, etc. The more detailed and accurate and accessible the information is to travellers, the more likely they are to select northern BC as a travel destination. Advertising space can be provided within these materials to offset the cost of production while simultaneously promoting local businesses

Key Highlights & Messages to Make Northern BC an Appealing Destination

The following outlines the key messages & elements that should be addressed in marketing and promotional efforts for the region:

- **Signature Trails & Recommended Rides** (Loops)– these are key attractions for mountain bike travellers and can be used to highlight and the best options for visitors that are new to the area
- **Promote the diversity and variety of riding experiences** – mountain bike travellers want to see that there is a diversity of trails and riding experiences available

- **Provide Memorable Riding Experiences** – mountain bike travellers are not just looking for places with the most trails; they are choosing to pursue excellent riding experiences. Marketing and promotions should address this desire. This includes the following:
 - Providing information, not just on trails and networks, but on potential trail loops, epic ride opportunities that are based on local knowledge and provide the feeling of being ‘authentic’. These includes providing tips on loops and highlighting history, key geographic features, views and scenery
- **Promote riding experiences that link the region together as an interconnected product** - presenting a series of trails, one or more in each community, that can be undertaken as a challenge could provide an opportunity for establishing northern BC as an appealing destination. This could involve establishing trip and riding itineraries with themes connected to riding preferences including trails in each community across the region. These could be set up as formal or informal riding events to raise awareness and interest in the region and would involve the participation and collaboration of all the communities.
- **Family Friendly Riding Experiences and Itineraries** – providing information on riding experiences and trail loops that are suitable for families and young children will be important for appealing to this growing segment of the mountain bike recreation and tourism market
- **Northern BC as a place for exploration with friends and family** – although mountain bike travellers are looking for detailed information, maintaining a sense of exploration of new places and riding experiences will be a key part of promoting and creating a sense of adventure
- **Character and culture of the region and each community** – mountain bike travellers are attracted to communities that have a strong sense of culture & community. Vibrant and welcoming town centres, restaurants, friendly people, etc
- **Local “authentic” business** – cafes, restaurants, pubs, heritage buildings, accommodations, etc. Mountain bike travellers want authentic experiences and to support local business (chain restaurants & franchises are not preferred options).
- **Bike shops and key supporting services** – a critical decision making factor for any region is the knowledge that key services such as bike shops, repairs, parts, laundry, showers, etc will be available. Mountain bike travellers also want to know that these services will be open and available beyond normal hours that are typical for smaller towns. Knowing that a spare tube can be found and a liquor store open on a weekend, can be a critical piece of information when planning a trip and selecting destinations.
- **Relative distance of northern BC to other popular destinations** (ie. It’s half the distance to Moab) – there is a strong perception that northern BC is too far of a drive. However as awareness of offerings and riding opportunities increase compared with other locations, the attractiveness and perception of distance of the area also changes
- **Short driving distances between communities & growing riding opportunities** – mountain bike travellers want a substantial level of riding experiences compared with the time it takes to travel to

a destination. Highlighting the growing number of trails that are within short drives of each other throughout the region will be a key marketing strategy

- **No crowds & solitude** – a key advantage for northern BC is the relatively low numbers of riders and solitude that can be experienced while riding. Juxtaposed against the more crowded urbanized experiences in other areas of the province could be very appealing to many travellers
- **Safety** – while mountain bike travellers are typically self-sufficient and prefer to be self-guided, they will hire local guides for more adventurous pursuits into back country or high alpine
- **Long daylight hours** – the opportunity to ride during the long daylight hours of the summer time can be an appealing attraction that sets northern BC apart from other destinations
- **Unique seasonal riding experiences** – autumn colours and weather can also set northern BC apart as a potential riding destination

Community Strategic Action Plans

The following section outlines those strategic action plans that can be undertaken to support the development of mountain bike recreation and tourism at the community level throughout northern BC.

Build Capacity within Communities

A critical element of ensuring the development of a robust and sustainable mountain bike recreation and tourism sector is to build the capacity of local communities. This includes supporting and building the capacity of local champions in creating mountain bike and trail user groups, undertaking and coordinating trail planning, permitting, development and maintenance.

In some of the communities there was a fair amount of confusion and uncertainty around land tenure, access and management that would need to be addressed to ensure the development of sustainable trail systems. The local clubs and trail builders need to be provided with greater clarity regarding procedures and the jurisdiction of differing levels of government in order to successfully proceed with the sanctioning and legal development of trails.

Recommended Action Steps:

- a) **Provide assistance with grant writing and fundraising** – local governments can provide assistance to local user groups with grant writing and funding applications. The Northern Development Initiative Trust also facilitates workshops for grant writing
- b) **Provide assistance with permit applications for trails** – provide clear information on the processes and protocols for permitting and legal sanctioning of trails, including insurance requirements and risk assessment

- c) **Trail building workshops** – for local trail builders and volunteers and developing capacity and knowledge within the community to support sustainable trail planning and construction. This can be important for engaging local trail builders and creating buy in and support for trails
- d) **Mountain bike instructor and coaching clinics** – this can create local capacity for supporting and encouraging new riders to enter into and participate in the sport of mountain biking. There are several recognized instructor programs available in the province as well as Cycling BC coaching certification
- e) **Event coordination and sanctioning** – ensure events are properly organized according to recognized sport organizations such as Cycling BC. Cycling BC sanctioned events are eligible for cycling event insurance

Establish Clear Visions & Planning for Trails & Mountain Bike Recreation

There is a need for each of the communities to undertake a process of creating clear and mutually beneficial vision for trails and recreation among all user groups and define how mountain biking supports or can be supported by that vision. Addressing and clarifying these issues will be important for ensuring the long-term development and sustainability of mountain bike recreation and tourism throughout the region.

The development of the trails and supporting infrastructure often occurs in communities in an informal and ad hoc fashion. This can often lead to communities and local clubs being unprepared for increased participation from local riders and visitors. Insufficient facilities or trail systems that do not meet the needs and expectations of riders and visitors will leave local clubs and government agencies struggling to catch up or maintain the facilities already in place.

Recommended Action Steps:

- a) **Support the development of trails planning** – a number of the participating communities through the region do not have trails plans in place to guide the development of their trail networks.
- b) **Place a strong focus on creating linkages between communities and trail systems** – trails systems that provide opportunities for riders to access trails directly from the community increase opportunities for accessing services in the community, generating economic activity, and also increase the visibility of the trails and their social and economic impacts
- c) **Place a strong emphasis on planning for comprehensive trails and mountain bike recreation planning** – ensure that the plans go beyond the development of trails to include signage, supporting facilities and infrastructure as well as long term maintenance

Foster Mountain Bike Culture & Community

All successful mountain bike tourism destinations have a strong sense of community and culture around trails and mountain biking. These are the communities that have robust local clubs and user groups who are passionate and committed to trail development and supporting the sport within their community. This fosters strong support from the community that provides an environment in which sustainable high quality trails are developed and maintained to an appropriate standard. This ultimately leads to the development of riding experiences that attract visitors and generate successful tourism opportunities.

There is no standard definition for mountain bike culture and the meaning can change from community to community as well as for differing segments of the tourism market. Some common features include:

- Vibrant and robust local user groups with significant numbers of members, riders and volunteers
- High quality local trail systems that are well built and maintained and provides for positive riding experiences
- Local events, festivities and programming that integrates and presents mountain biking as a primary activity and enhances the sense of identity and community around mountain bike recreation (i.e. mountain bike festivals, community races and rides, or more general community events that also include mountain bike activities)
- Local community that is open to and welcoming of mountain bike recreation & visitors
- Local businesses and community facilities that support and are prepared to cater to mountain bike recreationists and travellers

Identifying these elements and supporting and fostering them are a critical part of developing local mountain bike culture and enhancing the community as a destination.

Recommended Action Steps:

- a) **Support & host local events and festivals around mountain bike recreation & culture** – this can include anything from local races, rides, community events, film nights & festivals – featuring local riders and filmmakers, etc
- b) **Build community pride & support for mountain bike recreation** – many local clubs and communities will do this by hosting events, and having t-shirts, stickers and other paraphernalia that builds community pride
- c) **Partner with local media to develop and disseminate positive stories about mountain bike recreation and tourism**

Build Mutually Beneficial and Supportive Partnerships

Building partnerships between user groups, local community and business organizations is of vital importance to the development of a sustainable mountain bike recreation and tourism sector. Strong partnerships help to ensure the development and maintenance of trail systems as well as ongoing community participation. Without these partnerships, trails and other forms of programming and infrastructure can be compromised or even lost due to changing economic circumstances and priorities.

Partnering with other trail user groups can provide significant opportunities for communities to build broader support for all forms of recreation reduce tension and mitigate conflict, provide a greater pool of resources and volunteers, and can lead to better trail and recreation opportunities for everyone.

Partnering with First Nations

A critical step for all communities is to reach out and engage local First Nation communities. First Nations in British Columbia possess constitutionally affirmed Aboriginal Rights and Title and consultation and engagement is required for the permitting and sanctioning of trails. Furthermore, many First Nation communities present many significant opportunities for partnerships to create high quality trail systems with remarkable historical and cultural significance. Collaborating with First Nations to identify culturally, historically, or spiritually significant areas is critical to ensure these areas are respected and protected. First Nation communities have significant numbers of youth who can benefit from mountain bike recreation and tourism. Engaging with local First Nations as early as possible in the development process can create substantial opportunities and can lead to lasting partnerships.

Recommended Action Steps:

- a) **Seek local business participation and support in the development and maintenance of trails** – for example Trail Adoption programs. This creates promotional opportunities while linking local businesses directly to the social and economic benefits of trails
- b) **Seek local business participation and sponsorship of local programs** around mountain biking include community rides, races, youth programming, festivals and events
- c) **Raise awareness of the social, economic and environmental benefits of mountain bike recreation and tourism** – providing partners with information on the benefits of mountain bike recreation and tourism is a key step to developing good relationships and support
- d) **Reach out and engage other trail user groups** – partnering with other trail user groups can assist in building support for trail developments as well as providing additional resources and capacity
- e) **Reach out to local natural resource operators** – initiate dialogue, build relationships and identify opportunities for collaboration and mutual benefit. Mining, forestry and other resource operators can be important partners when gaining and maintaining access to lands for trail development. Resource companies quite often provide financial support and contributions to community development projects in order to sustain social license
- f) **Engage local First Nations** – as early in the development process as possible with a focus on respecting cultural protocols and supporting youth to participate and realize the benefits of

mountain bike recreation and tourism to the greatest extent possible. Identify key concerns regarding areas of significance for culture, spiritual and heritage areas and collaborate to mitigate and manage possible impacts.

Develop Mountain Bike Trails & Supporting Infrastructure

Mountain bike trails must be developed with a focus on creating high quality riding experiences as well as ensuring the protection and preservation of local ecosystems. In order to receive legal sanctioning, trails must be developed in collaboration with and adhere to the standards established by Recreation Sites and Trails BC. This is also a critical step in order to provide insurance and the mitigation of risk for local landowners.

Signature Trails – a primary focus of trail developments should consider opportunities for developing ‘signature trails’. These are trails that provide significant riding experiences with a focus on length (30km or more), diversity of riding styles, technical difficulty (intermediate to advanced), physically demanding (bragging rights) and incorporate significant local geography and views and scenery.

Recommended Action Steps:

- a) **Build Progressive & diverse trail systems** – ensuring that trail riders of varying levels of ability can participate and grow their skills overtime. Evidence indicates that successful communities provide the bulk of riding opportunities within the intermediate riding levels with sufficient beginner level and advanced riding opportunities.
- b) **Build trails to accepted trail standards such the International Mountain Bike Association Trails Standards and the Whistler Trail Standards**
- c) **Provide linkages between communities & trail systems** – providing linkages from trails to municipal bike paths and roads that allow riders to easily access trails directly from the community provide greater visibility and facilitate participation. Strong linkages can also link riders with local business services and enhance economic activity
- d) **Provide quality and effective signage & way finding** – ensure riders can find the trails as well as navigate the trail system. Signage should provide information on potential trail loops, and technical difficulty, features and challenges as well as some additional information such as history, trail sponsors, etc.
- e) **Develop bike skills parks** – provide opportunities for riders to develop skills and enhance their skills while encouraging new participants to enter the sport. Bike skills are often most effective when centrally located in a community as well as linked to trail networks
- f) **Parking at trailheads** – the development of adequate parking at trail heads ensure access to trails and reduce conflicts with traffic and adjacent land uses

- g) **Provide supporting amenities such as washrooms and garbage facilities** – important for ensuring positive riding and visitor experiences
- h) **Ensure key elements are included in trail developments such as viewpoints, nature & scenery** – are highly sought after by riders and visitors alike and are critical for positive riding experiences
- i) **Additional information boards on culture, geography & history** – these can add to the trail experience in meaningful ways and create a sense of place

Support Local Businesses to Service & Cater to the Mountain Bike Recreation & Tourism Market

There is a rapidly growing mountain bike recreation and tourism sector in British Columbia with a broad diversity of businesses that cater and provide services from retail and services to accommodations and transportation. There are a growing number of businesses catering to the market in the Yellowhead Corridor and northern BC. Supporting these ventures as well as assisting local businesses and raising awareness of the market opportunities will enhance and strengthen the economic activity within this sector.

Recommended Action Steps:

- a) **Raise awareness & interest among local businesses for serving the mountain bike recreation & tourism market** (please see section 2.5 for more details) - This can include:
 - a. Providing brochures & information on riders and visitors and desired services and products
 - b. Facilitating workshops and seminars for local business owners and tourism operators
- b) **Work with local media to heighten awareness and raise the profile of market opportunities** – to provide information through local print, radio and television
- c) **Promote local businesses to the mountain bike recreation & tourism market** - Highlight local businesses in local, regional, and provincial websites, print and promotional materials and other media to strengthen the overall community position within the tourism market

Ensure Trail Networks are Properly Maintained

Ensuring that trail networks are properly maintained is a critical part of providing high quality and positive riding experiences for both local and visiting riders. It represents a significant challenge for communities as trail networks expand and the ability of volunteer driven organizations to manage substantially growing workloads. Mountain bike clubs and local user groups need to consider balancing the development of new trails with their capacity to maintain them. It is often a critical challenge for communities where financial resources may exist to build trails, but quite often there are none to ensure ongoing maintenance. This issue is of particular importance for communities that wish to invest in trail development for both recreation and tourism. Without planning for long-term maintenance and upkeep, these investments may not deliver the anticipated benefits. If communities want to invest in trails, they need to also be prepared to invest in their upkeep and treat them as community assets similar to other recreation infrastructure.

Recommended Action Steps:

- a) **Integrate trail maintenance and management plans in to Trail Plans** – ensure the ability to manage and maintain trails are part of the planning process from the very start
- b) **Trail Adoption Programs (TAP)** – this involves local community groups, agencies and business taking responsibility for specific trails. This program, successfully developed by the North Shore Mountain Bike Association, provides opportunities for participating groups to assume ownership of specific trails for maintenance and upkeep. This kind of program can build community pride and also promote community support.
- c) **Volunteer maintenance work groups** – this involves training and utilizing local volunteers to maintain trails. Some communities, such as Burns Lake, engages local students and riders who participate in trail maintenance days with the incentive of free shuttles and group rides upon completion of maintenance tasks
- d) **Partner with local wildfire crews** – some communities, such as Burns Lake, have developed partnerships with local fire fighting crews who provide brushing and fire suppression activities in the early portions of the fire season
- e) **Professional trail maintenance crews** – this involves hiring laborers to work in crews to provide trail maintenance
- f) **Maintenance scheduling to fit local ecosystems** - as communities enhance their experience and knowledge of their local ecosystems, the timing of maintenance work can be planned to best fit with local growth patterns. For example, some communities time their work to ensure that brushing coincides with periods of typical strong growth thus ensuring there is less demand for follow-up later in the season.

Monitor, Evaluate & Report the Social & Economic Impacts and Benefits

One of the most critical steps local communities and trail user groups can take to ensure continued support for trail developments is to monitor, evaluate and report on the social, economic and environmental impacts and benefits to their respective community.

Recommended Action Steps:

- a) **Install counters on key trails** – electronic counters that track the number of users on specific trails can assist in providing user estimates for trail systems
- b) **Gather trail user data from existing web based service providers** - Pinkbike.ca, one of the largest websites for mountain bike recreation in the world, has recently launched Trailforks.ca, which is a user driven site for recording trails and rider information. Pinkbike is making this data available to the public, which will provide substantial information on trails and rider profiles.

- c) **Undertake interviews with trail users at specific sites regarding visitation, expenditures** – this provides an understanding of the potential economic impacts from local riders and visitors
- d) **Track the number of community participants** – keeping track of the number of participants in mountain bike recreation from the local community can provide an understanding of the social and health benefits of mountain bike recreation. Recording the number of participants in local events, as well as the number of riders and frequency of use on local trails provides important statistics that can be utilized to assist local administration and governments to understand the social benefits of trails recreation and the return on investment for trail development. Tracking participants can be accomplished through a variety of options including:
 - Recording the number of participants in local riding events
 - Encouraging riders to record and share their activities through social media such as Facebook or Strava and Trailforks – there may be some unease with monitoring such activity, particularly for mountain bikers which traditionally has been a somewhat solitary endeavor, but for advocates struggling to demonstrate the value of trails, every ride shared is a vote and endorsement for local trails recreation
- e) **Share analysis of the information** gathered for potential ridership, visitation rates and social and economic benefits to local government agencies, funders as well as sharing with the business community and the community at large

Regional District Strategic Action Plans

The following provides a description and discussion of the strategic action plans that can be taken at the Regional Districts level to support the development of mountain bike recreation and tourism throughout the area. These Strategic Action Plans are intended for application among multiple communities collaborating in clusters within the regional districts throughout the region.

Trail Plans & Ensure Sustainable Access to Lands

A significant portion of the trail networks, or areas identified for future trails, are largely within the jurisdiction of the Regional District Governments (RDG). The RDGs have a significant role to play in developing trails plans and ensuring appropriate access to the land areas required for trail developments.

Recommended Action Steps:

- a) **Identify Trail Development Opportunities & Develop Trail Plans** – this will involve working with local mountain bike and trail user groups to identify opportunities and develop and implement trail plans
- b) **Integrate trails into regional trail planning processes** – this will involve ensuring that the trail opportunities identified are included and addressed in other land use and management plans where appropriate

- c) **Set aside lands for trail developments where appropriate** – where appropriate, ensuring that lands are set aside and maintained for trails and riding experiences

Regional Trail Coordinators

Regional District Governments, depending on the availability of funds and direction from their respective Boards of Directors, can establish positions mandated to carry out the coordination and development of trail networks throughout their jurisdictions. These positions can be highly effective in coordinating many aspects of trail development among communities in the region, which is critical for establishing northern BC as a mountain bike recreation and tourism destination.

The Squamish – Lillooet Regional District is one such example, where a position of a regional trail coordinator was created to oversee the development of the Sea to Sky Trail as well as to support the development of other trail systems. As a result, significant progress has been made on the development of the Sea to Sky Trail as well as other trail systems throughout the SLRD area.

Recommended Action Steps:

- a) Undertake a feasibility analysis to explore the opportunity for the creation of Regional Trail Coordinators for each of the regional districts along the Yellowhead Corridor and northern BC as a whole

Regional Trail Maintenance

Trail maintenance can be a costly and time-consuming task. It may prove more financially feasible and sustainable for the communities within each of the regional districts to consider collaborating and arranging for regional trail maintenance crews to undertake the maintenance of trails at the regional level rather than each community attempting to support their own crews.

Recommended Action Steps:

- a) Explore the possibility of coordinating trail maintenance at the regional district level with a 'professional regional trail crew' that would travel throughout the area and undertake trail maintenance responsibilities

Financial Support & Fund-raising

Regional Districts have some powers for providing financial support for the development of trails and infrastructure. Some jurisdictions, such as the Squamish – Lillooet Regional District have implemented a requisition tax, which is applied against the value of properties throughout the regional district boundaries. This tax raises approximately \$150,000 annually and is used to fund a full-time trails coordinator position as well as to cover some trail development and maintenance costs. Other communities have implemented development charges on new developments that are put into a trail development and maintenance fund

with the understanding that trails are integral to community health and sustainability and represents worthwhile investment. There are other communities that have implemented various taxes such as hotel room surcharges, which have been used to support various elements of the tourism economy from arts and culture to marketing and promotions.

Recommended Action Steps:

- a) **Explore the possibility of developing new revenue tools** such as development charges, parcel taxes or hotel taxes to support trail development and maintenance at the regional district level
- b) **Assign RD staff with a mandate to assist local trail user groups to prepare and submit funding applications** – staff can substantially increase the capacity of community groups to pursue and succeed in securing funding through grant applications



Wooden Bridge on Papa Wood Trail – Phiderny Recreation Site – Prince George

PART ONE

PROJECT OVERVIEW

1.1

Document Overview

This strategy document is made up of several interconnected sections including the following:

MOUNTAIN BIKE RECREATION & TOURISM DEVELOPMENT STRATEGIES – provides the recommended action plans that the communities and stakeholders throughout the region should consider and implement in order to realize the visions and goals for collaboration and developing a robust and sustainable mountain bike recreation and tourism sector for Northern BC.

PART ONE: OVERVIEW – provides an overview of the Northern BC Mountain Bike Recreation and Tourism Development Strategy including the background and rationale for the Strategy, goals and objectives, the participating communities and stakeholders, and the project activities and outcomes.

PART TWO: MOUNTAIN BIKE RECREATION & TOURISM DEVELOPMENT – provides an overview of the state of mountain bike recreation and tourism development in British Columbia and in Northern BC in particular. This section also outlines the social benefits of mountain bike recreation, key trends as well as providing a review of the key elements and critical success factors and best practices for developing successful mountain bike recreation and tourism destinations.

PART THREE: MOUNTAIN BIKE TOURISM MARKET ASSESSMENT – provides an overview of the mountain bike tourism market, the economic trends and historical performance as well as the mountain bike tourist and visitor profiles. This section also outlines the results of the Mountain Bike Travellers Focus Group and the Survey with a comprehensive discussion of key decision making factors and the implications for Northern BC.

PART FOUR: ASSESSING THE MARKET OPPORTUNITIES FOR NORTHERN BC – provides an overview of the degree of awareness, familiarity, perceptions and impressions that mountain bike travellers hold of Northern BC with regard to riding opportunities and the supporting amenities and services that are typically required to attract visitors. This section also outlines the potential mountain bike tourism markets for Northern BC.

PART FIVE: REGIONAL COLLABORATION - provides an overview of several case studies examining the successes and lessons learned by several regions around BC and internationally that have pursued a regional approach to mountain. It also provides a discussion of the level of interest and priorities for regional collaboration for the communities throughout the Yellowhead Corridor.

PART SIX: DEVELOPING MOUNTAIN BIKE RECREATION & TOURISM IN NORTHERN BC – discusses the state of mountain bike recreation and tourism development throughout the project area outlining key challenges for development, market readiness, as well as regional and community profiles. This section also provides Strengths, Weaknesses, Opportunities and Threat Analysis as well as identifying the key issues each community should address in order to move forward and realize their vision for mountain bike recreation and tourism development.

1.2 Background & Context

Mountain bike recreation and tourism has enjoyed remarkable growth in British Columbia over the past several decades. The province has become renowned as a world-class destination with substantial trail networks, skills parks, events and festivals that attract riders from around the world. Within the context of this report, mountain bike recreation refers to the activity of trail riding by residents within a community for sport and recreation. Mountain bike tourism refers to non-resident visitors traveling to a destination to participate in trail riding or other riding experiences.

In recent years, Northern BC has experienced substantial increases in the development of mountain bike trail networks, bike parks, and related infrastructure and tourism services. A growing number of communities across the region have undertaken significant developments in trails and mountain bike infrastructure and facilities. The results have been increased recreation opportunities, growing tourism and new businesses and employment, activities for youth and community pride. Some of the communities have well developed and growing trail networks and mountain bike recreation and tourism sectors, whereas others are just beginning to develop.

Currently, there is no unified strategy for branding and marketing Northern BC, and the communities along the Yellowhead Corridor, as a destination for mountain biking, which is impeding growth. It is challenging and financially cost prohibitive for communities to market themselves individually or to provide the level of experience required to attract a substantial volume of visitors. Ensuring the continued growth and sustainability of the emerging sector will require the development and implementation of a cohesive marketing strategy that will involve a strong brand and building awareness of the region among a discerning market.

1.3 Project Goals & Objectives

Recognizing the need to explore the viability and potential benefits for northern communities, the Western Canada Mountain Bike Tourism Association (MBTA) partnered with Northern BC Tourism to initiate the Northern BC Mountain Bike Tourism Initiative. The Northern BC Mountain Bike Tourism Initiative was intended to explore and assess the viability and potential for twelve communities and three regional districts across Northern BC all along the Yellowhead Highway from Valemount to Terrace, to collaborate collaborative and promote the region as a destination for mountain bike recreation and tourism.

The objectives for the initiative were as follows:

- Firmly establishing the economic viability for Northern communities to pursue a collaborative approach to marketing mountain bike tourism
- Identify strategies and actions the participating communities can take to collaborate and promote mountain bike recreation and tourism across the region
- Develop a marketing and tourism development strategy for Northern communities to increase the volume of riders visiting the area and generate greater revenues, employment and economic opportunities, funding, financing and support for recreational mountain biking and tourism
- Provide recommendations for developing a branding strategy for the region in order to develop a competitive position

As the project developed it became clear that the final strategic plan would have to incorporate more than strategies for developing tourism programs, but also to support and foster the development of trails and mountain bike recreation across the region more generally.

There are a number of regions, both in BC and around the world, that are currently embracing a regional approach to mountain bike recreation and tourism development. A key objective for this project was to review and evaluate the best practices and lessons learned from other regions and evaluate their applicability for Northern BC.

The key questions addressed by this project include the following:

- **Does Collaboration Work?** Are there regions and communities that have developed collaborative strategies that have resulted in higher visitation rates and enhanced economic activity?
- **What are the Best Practices & Lessons Learned?** What strategies and practices are other regions and destinations utilizing and have

they been successful? What are the best practices and lessons learned?

- **Does It Make Economic Sense?** What is the likelihood that the participating communities will experience a growth in the number of visitors and economic activity to justify the effort and expense of collaboration?
- **What Does Collaboration Look Like?** What are the key elements that should be included in a regional collaborative model for Northern BC?

Understanding how communities and regions around the world are establishing themselves as successful mountain bike tourism destinations allows the development of practical and effective strategies for communities participating in the Northern BC Mountain Bike Recreation & Tourism Development Strategy.

1.4 Participating Communities & Stakeholders

The Northern BC Mountain Bike Tourism Strategy has involved a broad diversity of communities as well as stakeholders including municipal and district governments, tourism and economic development agencies as well as mountain bike clubs and other trail user groups.

These included the following:

Mountain Bike Clubs & Trail User Groups:

- | | | |
|---|--------------------------------------|---|
| • Burns Lake Mountain Bike Association | • Smithers Mountain Bike Association | • Terrace Off-Road Cycling Association |
| • Omineca Ski Club | • Otway Nordic Ski Area | • Prince George Cycling Club |
| • Valemount & Area Recreation Development Association | • Robson Valley Mountain Bike Club | • Yellowhead Off-Road Cycling Association |
| • Rip'n the North Mountain Bike Club | | |

Tourism & Economic Development Agencies:

- | | | |
|--|--|---|
| • Burns Lake Chamber of Commerce | • Houston Chamber of Commerce | • Tourism Smithers |
| • Terrace Economic Development Authority | • Tourism Prince George | • Tourism Valemount |
| • Kermodei Tourism Society | • Bulkley Nechako District Chamber of Commerce | • Northern Development Initiative Trust |

Governmental Agencies:

- | | | |
|--|--|---|
| • Village of Burns Lake | • Village of McBride | • District of Valemount |
| • City of Prince George | • District of Mackenzie | • District of Fort St. James |
| • Village of Fraser Lake | • District of Vanderhoof | • District of Houston |
| • Town of Smithers | • City of Terrace | • Village of Telkwa |
| • Regional District of Bulkley-Nechako | • Regional District of Kitimat-Stikine | • Regional District of Fraser Fort George |

1.5 Project Activities & Outcomes

The Northern BC Mountain Bike Tourism initiative included the following activities & outcomes:

Stakeholders Regional Engagement Trip (October 2013)

With the support of Recreation Sites & Trails BC and Northern BC Tourism, the project team hosted three information sessions between October 7 and 9 in Prince George, Burns Lake, and Smithers to explore ideas around the creation of a regional mountain bike tourism strategy for Northern BC. The meetings, two of which, Prince George and Smithers, were held in conjunction with Northern BC Tourism Annual General Meetings, and one separate meeting in Burns Lake, involved representatives from municipal governments, tourism agencies, as well as mountain bike and trail recreation groups. These meetings provided the foundation for the development of the project's vision, goals and objectives. The results of these meetings are included as Appendix A to this report.

Focus Group (April 2014)

The focus group session was held at the North Vancouver offices of David Nairne + Associates Ltd on April 30, 2014. There were ten participants (five male and five female) who ranged in age from early thirties to late forties. A number of techniques were employed to recruit qualified participants (bike shows, online mountain biking forums, etc.). To qualify to participate, each recruit had to have taken a mountain bike trip of one or more nights in the past 3 years.

The objectives of the session were to gather in-depth insights into:

- Factors which are important in the destination consideration/selection process
- What constitutes an ideal mountain biking trip
- Impressions of Northern BC as a mountain biking destination
- Planning resources needed to plan a mountain biking trip to Northern BC
- Likelihood to travel to Northern BC for a mountain biking trip

The focus group provided invaluable information and insight into the motivators for mountain bike tourists, their key issues and concerns, and their impressions of mountain bike experiences in Northern BC. The results of the focus group are included as Appendix B to this report.

Regional Engagement & Site Visit tour (June 2014)

The Regional Engagement and Site Visit Tour was a key deliverable for the Northern BC Mountain Bike Tourism Strategy. It was intended to provide the project team with a greater understanding and appreciation of the nature and character of the region and the participating communities as well as the potential issues, challenges and opportunities for mountain bike tourists to visit and experience the region.

The objectives for the tour included the following:

- Meet with key stakeholder groups within each of the participating communities
- Visit and assess the existing trail networks and mountain bike recreation and tourism facilities & infrastructure
- Gain a greater understanding of the barriers and challenges for the communities across the region to collaborate and promote the region as a destination for mountain bike tourism

The tour took place over a period of ten days between June 5 and June 15, 2014. The communities visited as part of the tour included Valemount, McBride, Prince George, Mackenzie, Fort St. James, Vanderhoof, Burns Lake, Houston, Smithers and Terrace. The results of the Regional Engagement Tour are included as Appendix C to this report.

Market Assessment & Literature Review Report (August 2014)

This report was completed to provide a clear understanding of the market potential for mountain bike tourism, market as well as key social trends that could impact the future development of the sport. Through a detailed examination of existing research from British Columbia, the United States, and the United Kingdom, the Market Assessment and Literature Report delivers a detailed account of mountain biking including the following:

- Justification for developing mountain bike tourism
- Current trends in mountain bike tourism (motivation and willingness to travel and participant profiles)
- Exploring the mountain bike product including examples from the regional and municipal level
- Developing mountain bike tourism destinations

This report is included as Appendix D to this report.

Regional Engagement & Site Visit Tour Follow-up Questionnaire (October 2014)

The Regional Engagement Tour follow-up Questionnaire was intended to solicit further input and feedback from the key stakeholders within each of the communities participating in the Northern BC Mountain Bike Tourism Initiative. Following the Regional Engagement Tour, the project team identified a number of issues that required further information and clarity from the communities. The Follow up questionnaire was developed using online survey software Survey Monkey and was sent to all of the stakeholders involved in the project.

There were 42 individuals who completed the questionnaire representing local mountain bike clubs and trail user groups, government agencies, as well as tourism and economic development agencies. The results of the questionnaire are included as Appendix E to this report.

Mountain Bike Travellers Survey (October 2014)

An online quantitative survey was undertaken during the month of September 2014 to learn more about mountain biking related travel and specific interest in Northern BC as a riding destination.



Local Trail Builder & Rider in Fort St. James

A total of 3,485 respondents participated in the survey. Almost two-thirds of respondents were Canadians, with 37% of all respondents living in BC. Despite the predominance of Canadians, there was considerable participation from non-Canadians (36% of respondents).

The results of the survey are included as Appendix F to this report.



View of Robson Valley from McBride Peak

PART TWO

MOUNTAIN BIKE RECREATION & TOURISM DEVELOPMENT

2.1

Mountain Bike Recreation in British Columbia

Mountain biking has seen tremendous growth since its inception in the early 1980s. Mountain biking has made its way into popular culture and has become the most popular style of bicycle purchased in North America (Source: U.S. Commerce Department statistics, Gluskin Townley Group estimates).

The USA, Canada, Australia, New Zealand have some of the highest mountain biking participation rates in the world, yet the popularity of mountain biking continues to expand globally, particularly in Europe as well as in Asia and South America. (Source: Secondary Research - Mountain Biking Market Profiles, Parks Canada 2010).

Mountain biking has rapidly evolved into a multi-disciplined sport and recreational activity. Cross-country, downhill, all-mountain, enduro, dirt jump, etc. are all variations of mountain biking. Cross-country mountain biking was introduced to the Olympics in 1996. Like many things, the evolution of mountain biking can be attributed to advancements in technology. Mountain bikes have become stronger, lighter and more adaptable to suit the style of the rider and the terrain.

With the growth in mountain biking there have been challenges placed on participants, land owners, and land use regulators. Private land access and illegal trail building have been contentious issues and have led to trail closures and threats of legal action. The inherent risks associated with bicycles and the use of manmade technical trail features (TTFs) have resulted in the creation of trail building standards and land use policies geared to providing greater public safety and mitigating environmental damage while also allowing for mountain bike trails to be authorized on public land in BC if they are properly managed.

Many organizations have sprung up devoted to the development and promotion of mountain biking. Tourism opportunities related to mountain biking in particular is a growing business sector. Many Canadian mountain biking operators report a substantial number of participants from outside their region, province, and from outside of Canada. A survey of mountain bikers in Whistler, BC during the summer of 2006 found that the majority (68%) of trail and bike park riders were non-residents. (Source: See to Sky Mountain Biking Economic Impact Study – Whistler Report; 2006)

Table 1: Origin of Non-Resident Rider to Whistler

Origin	Total	Whistler Valley Trails	Whistler Bike Park
Greater Vancouver	23%	27%	19%
Sea to Sky Corridor	2%	3%	0%
Other BC	11%	8%	13%
Other Canada	10%	9%	10%
US	37%	33%	40%
International	22%	22%	23%

British Columbia has long been a harbinger for mountain biking due to the abundance of resource roads, trails and mountainous terrain. The province's reputation and importance in the mountain biking world have been elevated by the emergence of the "extreme" freeride culture depicted in videos and images since the late 1990s. From a mountain biking perspective, BC is often seen as technically challenging with vast areas of wilderness requiring exceptional riding and backcountry skills. This perception has attracted many of the world's best riders to BC, however, it has presented a challenge to convince the average rider that BC also has rewarding mountain biking experiences for riders of all ages and abilities.

Whistler Mountain Bike Park was one of the first ski resorts to offer lift-access mountain biking as part of its summer operations. By 2005, six ski resorts were operating bike parks in the province. The following year the resorts banded together as Bike Parks of BC to promote British Columbia as a mountain biking destination having the highest concentration of lift-access bike parks in North America. Whistler remains one of the top lift-access bike park destinations in the world hosting over 120,000 rider visits each season.

In 2008, the British Columbia Trails Strategy was launched to develop and promote the world class trails found throughout the province. Mountain bikers were seen as an important target group. To facilitate legal trail development a new policy for authorizing mountain bike trails on Crown land was created. Communities and local mountain bike clubs are now able to enter into a partnership agreement with the Province to manage trails on Crown land (see section on Crown land).

Many of the initiatives created over the past decade to develop and promote mountain biking have led to much improved trail management and participation rates at the local and regional level. A 2009 Outdoor Recreation Study showed that 22% of the population in BC, aged 18 or older, participated in mountain biking during the previous 12 months.

Legislative Framework

94%¹ of the land in British Columbia is provincial Crown land. Approval and management of Crown land trails is now the responsibility of the Recreation Sites and Trails Branch of the Ministry of Forests, Lands and Natural Resource Operations (MFLNRO). The Forest and Range Practices Act (FRPA) is the primary legislative tool used to approve trails on Crown land. Sections 56 and 57 of the FRPA, provide two avenues for approval of Crown land trails:

Section 57 Authorized Trails: Under section 57, the Minister may authorize the construction, rehabilitation, or maintenance of a trail. A trail authorized under section 57 is not required to be given legal consideration in forest planning. Before the Ministry authorizes the trail, the proponent must provide a submission to the satisfaction of MFLNRO that trail construction or management will not cause:

- a) Significant risk to public safety;
- b) Unacceptable damage to the environment; and
- c) Unacceptable conflicts with other resource values or users.

Section 56 Established Provincial Trails: Trails are deemed “established” by an order of the Minister under section 56 of the *Forest and Range Practices Act*. The trails are typically mapped for public awareness and established trails must be given consideration in forest management and planning. Rules under the *FRPA* may be posted and are enforceable. Establishment of a trail does not guarantee conservation in the same sense as a park or protected area.

Prior to authorizing or establishing trails, Rec Sites and Trails BC undertakes a process to consult with First Nations, government agencies, and other tenure holders (including forest licensees) that may be impacted by the trail.

Rec Sites and Trails BC manages trails through partnership agreements with local organizations. Often trails will only be considered for establishment where a potential partner has stepped forward, such as a local bike club. Proponents of the partnership agreement must agree to specific trail management operational standards including annual inspections. Operational standards include guidelines for trail construction and maintenance, annual maintenance schedule, trail difficulty classification, signage, initial trail inventory and annual inspections.

The Province is able to provide a General Liability Insurance Policy and Accidental Death and Dismemberment Policy to its partners. To be eligible for coverage, individuals, societies, corporations, or First Nations groups must have a formal partnership agreement with the Province for the management and maintenance of trails. Trails must be established under section 56 of the Forest and Range Practices Act. As of March 2013, the

General Liability Policy provided by the Province includes \$2 million in coverage per occurrence under the Stewardship Partners Insurance Program. The insurance program also provides coverage for serious injury of paid workers or volunteers as a result of participating in trail maintenance work.

For guidance on issues related to developing trails on Crown Land the community should be in contact with their District Recreation Officer (<http://dir.gov.bc.ca/gtds.cgi?show=Branch&organizationCode=FLNR&organizationalUnitCode=RSTBC>).

Mountain Bike Recreation in Northern BC

Northern BC has an abundance of resource roads and recreation areas that together offer unmatched potential for recreational mountain biking and tourism opportunities. The diverse landscapes, abundant wildlife and impressive geological and cultural aspects across the region provide a unique experience for adventure seekers.

Highway 16 spans 1000kms from Valemount to Prince Rupert along the southern edge of the region. Over ten communities with mountain bike trails are connected by Highway 16. In most cases the next neighbouring community is less than 2 hours drive away providing an ideal opportunity for communities to work collaboratively to promote the highway corridor.

Although the number of authorized well managed mountain bike trails along the corridor have increased in recent years there are still many communities struggling to gain the local support and funding that is necessary to initiate local trail projects.

Currently, Prince George, Burns Lake, and Smithers have the most significant and well managed trail networks supported by a high level of local involvement. Terrace and Valemount are moving forward with funded trail projects and growing community involvement. Houston has received approval to develop trails on crown land adjacent to the town and has begun to source funding and engage residents to commence development for the first phase of their trails master plan. Similarly, McBride has a trails master plan for their area and is working to source funding and local support. Fort St. James has an extensive trail network on Provincial Park, Crown and private land however the trails lack proper approvals from the appropriate land managers and owners and only a small informal group of local enthusiasts are currently maintaining the trails. Both Mackenzie and Vanderhoof have smaller trail networks mostly within municipal boundaries and are trying to gain more local support to expand what is currently available.

2.2

Social Benefits of Mountain Bike Recreation

Generally, there has been a growing trend toward active outdoor recreational activities in recent years. People are opting for less structured, more informal, and individualized activities that can fit into their busy lifestyles. Greater awareness of the environment is drawing many people toward activities that give them the opportunity to engage with nature. Trail infrastructure that is supported by public stewardship is becoming increasingly attractive to decision makers both for its low operating costs and for minimizing its carbon footprint (Source: The Social and Economic Impacts of BC Recreation Sites and Trails; 2011)

Inactivity has become a major contributing factor for increases in childhood obesity and chronic diseases such as diabetes. Outdoor recreation has long been heralded as having an important role in fostering healthy lifestyles and reducing the cost of health care. (Source: A strategic plan for the parks, recreation and culture sector of British Columbia; 2008)

Education through active engagement with nature and the environment is another key benefit associated with outdoor recreation and mountain biking “offering young people the opportunity to develop the skills, values and strategies that will guide them throughout their lives.” (Source: Sprockids.com)

Recreation & Community Culture



Kager Lake, the site of the main campground located near the Boer Mountain Trail Network in Burns Lake.

Recreation can be defined as "voluntary participation in leisure activities that are meaningful and enjoyable to the person involved." (Source: Applications in Recreation and Leisure: For Today and the Future). Many people view their main recreational interests as things that define who they are. These activities are critical to the person's health and wellbeing and help to energize them to meet the important obligations in their lives such as work and family. Recreation is also important for socialization and building a sense of community around an activity that attracts people with similar values and interests.

Mountain biking is an activity that can be done on an individual basis, but is typically done in small groups of two or more people. Mountain bike clubs are often created to unite local riders. Clubs provide a voice to represent riders' interests and to collectively develop resources to support and manage the mountain biking opportunities in the community for things such as events, trail building and maintenance.

Several communities in BC have embraced mountain biking as part of their identity. This would not have happened without the advocacy role that their local clubs have played in encouraging participation from local residents and building relationships with land owners and land managers. North Vancouver - NSMBA, Squamish - SORCA, Whistler - WORCA, Cumberland -

UROC, Rossland - KCTS, Fernie - FMBC, Williams Lake - WLCC and Burns Lake - BLMBA are a few examples of BC communities that have each earned reputations as mountain bike towns through the efforts of their local mountain bike clubs.

From a visitor's perspective, the culture of a community specifically represents the lifestyle of the people in that geographical area, the history of those people, their art, their beliefs, and other elements that have helped shape their way of life including their recreation.

Cumberland, BC - A good example of a town with its own unique community culture originating from a history of mining and forestry involving workers that immigrated from both Europe and Asia in the late 1800s. It has now become a hub for outdoor recreation and arts for Vancouver Island where mountain biking, hiking, water sports, music concerts and art exhibitions connect visitors with the community's culture both past and present.

2.3

Amenity Migration & Livable Communities



A local brewery in Valemount – a potential attraction for mountain bike tourists

As more young people move to cities in search of employment, educational opportunities and higher standards of living, rural communities are under constant pressure to attract and retain residents. The rural population in BC represented 14% of the entire provincial population in 2011 (Statistics Canada). Census data shows that although the proportion of rural to urban populations is in decline the actual number of people living in rural communities has remained somewhat steady since it plateaued in the early 1980s. At the local level, there is much fluctuation, particularly for single resource towns. Over the past few decades efforts have been made to diversify rural economies in order to support a more diverse labour force and provide new employment opportunities. However, jobs alone are not the only answer. As the population ages and as professionals with the ability to work remotely from just about anywhere increases, many look for places to live that offer a lifestyle without the hustle and bustle of the urban environment.

Rural areas with an assortment of natural, cultural, and recreational amenities are able to attract new and often skilled or affluent people to live in their communities. Often rural migrants are first exposed to an area as tourists or recreationists. If their experience is positive and they see the potential for a life that fulfills certain ideals, interests, and needs then there is potential for them to move to the community. Mountain bike trails are one such amenity that can help encourage migration to rural communities.

2.4 Mountain Biking as a Recreational Activity

Disciplines

There are a variety of mountain biking disciplines that offer riders different experiences and challenges. They include:

- **Cross country:** In this discipline, riders bike along long stretches of non-paved trails. Cross country has the highest rates of participation, both recreationally and competitively with an emphasis on endurance and skill. Bicycles designed specifically for cross-country riding tend to be light (20-25 pounds), often having front end suspension only. Price range: \$500-\$5,000
- **Downhill:** Downhill mountain biking is similar to alpine skiing. Riders start at the peak of a hill or mountain often after being “shuttled” to the top by ski lift, motor vehicle or helicopter. The descent is typically through steep and rough terrain at high speed. Downhill mountain bikes tend to be heavy (35-40 pounds) with both front and rear suspension offering up to 8 inches of travel. Frame geometry is specific to going downhill making these bikes relatively incapable of being ridden uphill. Price range: \$2500-\$10,000
- **Freeriding:** A popular form of mountain biking that originated in BC. Freeriding incorporates elements of traditional trail riding, big jumps, and technical maneuvers. Riders are forced to negotiate steep descents, while facing obstacles such as jumps, step-downs, drop-offs, skinnies, ladder bridges, A-frames, and teeter totters. Though still recognized as a discipline of mountain biking it is no longer as prominent due to concerns over risk and liability associated with extreme technical trail features.
- **All-mountain/Enduro riding:** A recent genre that refers to the merging of freeride and cross-country. This is one of the fastest growing segments attracting riders that enjoy the adventure of mountain biking. These bikes are designed for climbing and descending and are characterized by being relatively light (25-35 pounds) while offering moderate front and rear suspension travel that can be adjusted while riding through varied terrain. Price range: \$2000-\$10,000
- **Dirt Jumping:** Dirt jumping is the practice of riding bikes over shaped mounds of dirt in an attempt to become airborne before landing on a downward transition. Dirt jumping riders are primarily focused on performing airborne stunts and tricks. DJ bikes are very simple in design having only minimal front suspension and often only a single speed. Price range: \$300-\$2000

Trends in Riding Preferences

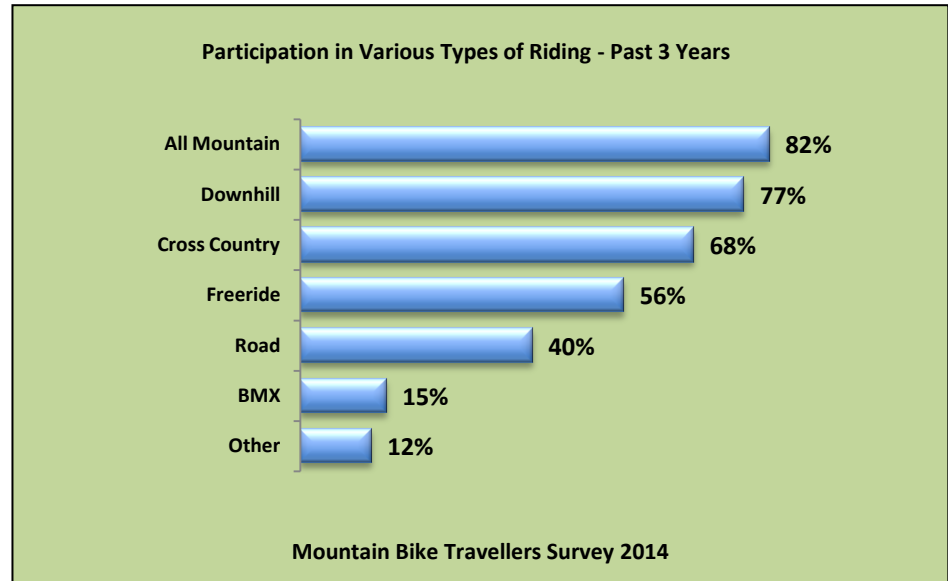
Mountain bike industry trends look at what types of bikes, components and gear are selling the most in the marketplace, however, these trends may not match local trends that are more closely associated with local terrain and trail design and the local mountain bike culture.

Over the past few years, there has been a huge amount of interest in larger wheel sizes which has resulted in a spike in mountain bike sales and a growing interest in all-mountain or enduro riding. The larger size wheels, 27.5" and 29", essentially offer an advantage over the traditional 26" wheels when it comes to riding over more technical trails allowing for more surface area of the tire to be in contact with the ground providing better traction. The larger wheels also roll more easily over rough ground without falling as deeply into the small depressions between the roots and rocks providing a much smoother ride.

There are numerous recent trends in mountain bike design, with many of them reducing the weight of the bike or allowing the rider to make adjustments without having to stop riding. Suspension has changed significantly with new designs featuring better responsiveness, more adjustment (on-the-fly) and lighter overall weight. Adjustable seat posts now allow riders to raise or lower their seats with the push of a button. Carbon frame sets reduce weight significantly while adding strength and rigidity. These advances in bike technology have had an impact on all disciplines, but the all-mountain segment in particular has likely benefited the most.

British Columbia is known for its mountainous terrain and authentic mountain bike adventure. The trend in the province tends to favour the all-mountain style of riding with bikes that are capable of adapting to diverse types of terrain.

In terms of events in BC, the greatest participation is in cross-country and enduro racing. The BC Bike Race, Single Track 6, and the Test or Metal Group of Events have the highest number of entrants and attract riders from around the globe. The BC Enduro Series, introduced in 2014, has managed to attract over 500 participants in its first year. Meanwhile, downhill racing appears to be losing ground, especially among female athletes with some categories being cancelled due to lack of registrants.



Types of Trails & Riding Experiences

There are a number of mountain biking products available on the market. Many continually evolve along with the technology used in the bikes. The following is a list of product types currently available in British Columbia.



Trail underdevelopment in Vanderhoof

- **Single track trails:** These are the most typical of all mountain bike trails. They are narrow, generally no more than 18 inches wide. They accommodate a broad range of riding styles depending on the terrain. Steep descending trails tend to be for downhill, freeride or all-mountain riders. Single track trails with less dramatic descents and more varied elevation changes tend to be preferred by cross-country as well as all-mountain riders.
- **Flow trails:** The recent emergence of flow trails has allowed for more beginner riders to enter the sport. Flow trails generally replace the rough elements of a trail such as protruding rocks and roots with a smooth trail bed and bermed corners allowing for riders of all abilities to enjoy the ride. Beginner riders can roll through undulating terrain while more advanced riders can ride at high speeds often becoming airborne over sudden rises in the trail.
- **Signature trails:** Trails of iconic significance that defines a community's or region's mountain bike culture based on the local terrain and natural features. Signature trails offer unique experiences, often providing challenge, adventure, scenery and a strong sense of physical accomplishment that generally appeal to more advanced riders.
- **Community Bike Skills Parks:** Community bike skills parks are very popular among youth and act as safe venues for skills development

and camps. A bike skills park is an area that provides riders the opportunity to hone their bike riding skills in a managed, progressive, and safe environment before tackling mountain trails. These parks can include dirt jumps, wooden bridges, wall rides, pump tracks, and teeter-totters.

- **Rails to Trails Networks:** These networks are growing in BC. They typically occur when abandoned railways, and other low grade trails and roads, link communities together. This also makes them ideal for multi-day touring.
- **Bike/Skills Camps and Tour Operators:** There are a number of bike camps and tour operators in BC offering a variety of tourism packages. Bike camps are used to provide training and instruction on mountain biking and to build skills. Tour operators take visitors out on mountain bike tours from half-day to multi-day tours in urban to rural and remote areas that may include guides, food and accommodation.
- **Festivals and Events:** Mountain bike festivals and events are popular as they combine the social and competitive aspects of mountain biking and cater to families and riders of all ages.

2.5

Developing Mountain Bike Tourism Destinations

Determining whether to proceed with developing a mountain bike tourism product requires consultation with stakeholders to assess support for the project within the community and the broader region. It also requires a realistic assessment of the existing trail system to determine whether mountain biking will be a key product or more of an ancillary activity.

One of the determining factors is the level of engagement and support from within the community: a local club exists, do they support the idea of promoting trails for tourism? The club is often responsible for maintaining the trails and must clearly see that the benefits of mountain bike tourism will help support their efforts. Is there interest in developing a youth mountain bike program in conjunction with the community recreation centre or schools? Engaging youth will create a base for attracting new riders in the community that will extend out to their families.

Critical Success Factors for Mountain Bike Tourism Destinations

A conceptual framework can be useful for identifying what factors are critical for developing mountain bike tourism at the community level. Freeman, 2011, separates critical success factors into two main categories. Contingent factors are the basic elements essential for emerging clusters or lesser developed regions while non-contingent factors are more prevalent in maturing clusters or regions where mountain biking has already become more established.

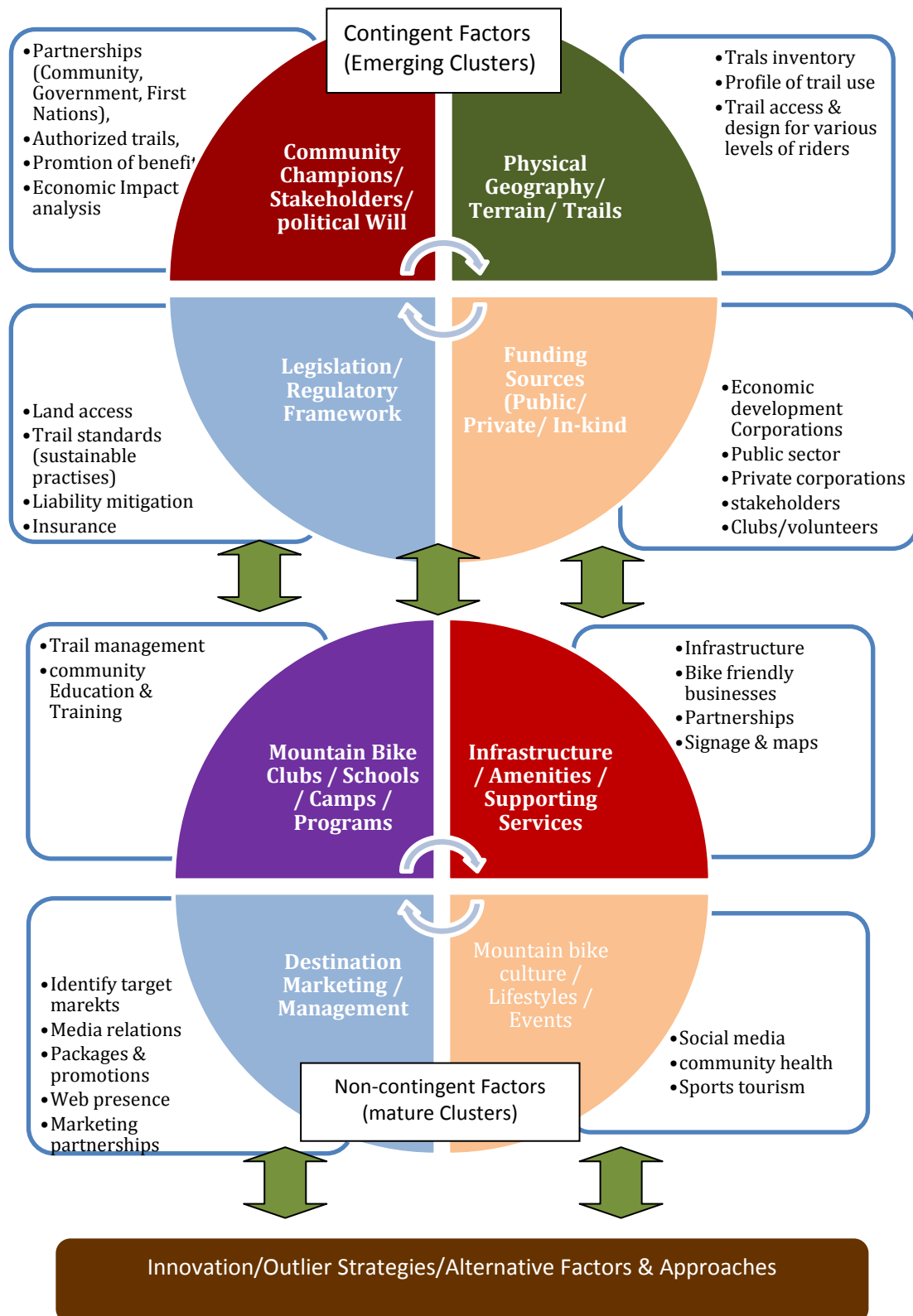
The framework acknowledges that different factors come into play over time as mountain biking becomes more established in the community or region. While communities looking to develop mountain bike tourism should focus on the contingent factors they should also give consideration to the non-contingent factors in their long term planning.

The communities within the Northern BC region are at various stages of development. Some are significantly more developed than others. Ideally, each community involved in the strategy should strive to move forward by addressing these factors.



Photo: John Wellburn

Framework for Critical Success Factors for Mountain bike Tourism



Freeman, 2011

Trails

"We didn't plan for it. Nor could we have. But here it is. From Williams Lake to Fernie, from Kamloops to Whistler, Squamish, Rossland, Nelson, Golden, Prince George, Cumberland...the list of BC towns renowned for their mountain bike trails grows every year. Bikers come from Calgary, Washington, California, the UK, and Switzerland. They come because there are few other places on the planet that offer such an incredible combination of trails, scenery, and adventure."

**Mitchell Scott – adventure
writer/editor, Kootenay Mountain
Culture**

Trails are the core product of any mountain biking tourism experience. The most popular trails are those that provide what mountain bikers are looking for: connection to nature, escape, fun, challenge, discovery, exercise, and variety, ease of route finding, camaraderie and adventure.

Many popular mountain biking destinations came to be without any formal trail planning or the intention of creating a tourism experience.

The mountain bike trails built by the pioneers of the sport (in most cases without approval or financial support) have become recreation and tourism assets for their local communities. However, the legacy of the early trails has also involved a great deal of retrofitting. The earlier freeride trails were built on steep fall line, had numerous structures made of wood (which tends to deteriorate over time), and poor water drainage making them unsafe and unsustainable over the long term.

The International Mountain Bicycling Association (IMBA) based in Boulder, Colorado has been advocating for legal land access for mountain biking since its inception in 1988. It added sustainable trail building techniques to its mandate when it initiated the Subaru/IMBA Trails Care Crew program in 1997. Since that time, IMBA and its affiliated chapters, including IMBA Canada, have been hosting trail building workshops across North America and have shared this knowledge around the world through the IMBA Trail Solutions manual. The work done by IMBA has laid the foundations for the high quality sustainable trails that are now the norm for most established mountain biking destinations today.

BC's mark on mountain bike trail design has involved technical riding through steep mountainous terrain and the use of wooden structures also known as technical trail features (TTFs). In 2003, The Resort Municipality of Whistler released the Whistler Trail Standards for Environmental and Technical Trail Features. This was the first engineered approach to building safe and environmentally sound technical trails.

Recreation Sites and Trails BC, the branch of the Ministry of Forests, Lands and Natural Resource Operations that is responsible for approving mountain bike trails on Crown Land uses both the IMBA Trail Solutions and the Whistler Trail Standards as guidelines to assess trails in the approval process.

Trails Master Plans

The first step for a community once they have decided to develop trails for mountain bike recreation and tourism is to assess existing trails and land where proper approvals for trail development have been provided. This exercise is best conducted by a professional trail planner who can develop a

master plan which is integrated with the needs of other trail users and other planned or existing community infrastructure such as bike paths and various types of land use or property development.

Signage and Supporting Services

In addition to great trails, a mountain biking destination needs to offer the services and supporting infrastructure that will support the needs of the mountain biking visitor. Roadside signs that guide visitors to the trailhead make it easy to find the trails and suggest that mountain biking is a key requirement. At the main trailhead, there should ideally be an area map of the trail network, sufficient parking, a clean washroom, garbage can, and perhaps a picnic table. The trails should be well signed particularly at trail entrances and intersections.

The community should have convenient services for food, accommodation, laundry, and entertainment such as pubs, cafes and restaurants. Local businesses need to be made aware of the needs of mountain biking visitors. Take them on a tour of the trails and explain the economic and social benefits of mountain biking so they can better understand the opportunity and become a local supporter.

Local bike shops are key partners for any mountain biking destination. They provide service for parts and gear purchases, mechanical repairs, and sometimes bike rentals. Bike shops are also key local ambassadors providing visitors with information on current trail conditions and recommendations for other services and riding opportunities in the area.

2.6

Best Practices

The following provides an overview of best practices for the development of mountain bike recreation and tourism from around BC and internationally. These examples are taken from Tourism Business Essentials - Mountain Bike Tourism Guide.

Mountain Bike Communities

Whistler, BC

Dynamic community and year-round destination. For a community originally built around alpine skiing, Whistler has become an unparalleled year-round destination with both residents and visitors alike benefitting from the array of outdoor recreation opportunities and facilities. Over the last several years, Whistler has worked hard to develop its summer product, including mountain biking. Summer visitations now exceed winter visits. Whistler receives approximately 2.3 million overnight and non-overnight visitors each year; approximately 44% in winter and 56% in summer. See more at: www.media.whistler.com/allabout-whistler/stats-and-facts

Kamloops, BC

Providing a diversity of mountain bike experiences. Kamloops is an excellent example of a community providing a wide range of mountain biking experiences. These include:

- Community bike park – the Kamloops Bike Ranch features a fast-flowing downhill trail with a multitude of table top jumps and berms rated for the expert rider, a jump park for expert and intermediate riders, and a BMX track built according to Canadian Cycling Association standards.
- Single track trails – the openness of the terrain surrounding Kamloops provides many opportunities for single track trails. Largely set on grassland and pine forests, designated trails are smooth and offer beautiful views of the river valleys and lakes. Many parks in the area offer cross country mountain bike trails, such as Kenna Cartwright Park.
- All-mountain and downhill – There are numerous options for all-mountain riding in the area including lift access downhill riding at nearby Sun Peaks Resort.

Burns Lake, BC

A “can do” attitude for working around the TTF issue. According to Kevin Derksen, president of the Burns Lake Mountain Bike Association (BLMBA), his organization has worked closely with the Burns Lake Community Forest (BLCF) and Recreation Sites and Trails BC, part of the Ministry of Forests, Lands and Natural Resource Operations, to come up with a winning partnership that allows access to a combination of private land and Crown Land for trail building within the Province’s guidelines. A 65 ha (160 ac) parcel of private land was acquired by the BLCF in 2006 and it is this parcel that contains the community bike park with dirt jumps and TTFs. The BLCF has provided land, the Regional District provided grant writing support and the BLMBA builds and maintains the trails. Additionally, BLMBA manages TTFs on Crown Land trails as well which includes the Boer Mountain Recreation Site covering 4,000 ha of single black diamond classification.

City of Rossland – Blending Trails and the Community Vision

“Building a vision” – Stewart Spooner of the Kootenay Columbia Trails Society explains that in the early 1990s, Rossland City Council and key individuals from the area began looking for ways to revitalize the local economy. They focused on “health and wellness”, given existing natural and cultural assets, including Red Mountain ski resort and an extensive but undeveloped trail system. During 1993-1994, as part of the City’s official

community planning process, the Parks and Recreation Committee recommended that the City develop the existing trail network in a formal way. Subsequently the concept of developing the trail system became part of the Official Community Plan and Council commissioned a Trail Master Plan. Now the community is beginning to see the tourism benefits. Kim Dean, director of the Kootenay Columbia Trails Society cited, “Businesses in town are definitely noticing an increase in mountain bike tourists to Rossland. It’s become the world-class amenity we originally envisioned.”

Hartland Bike Park

Capital Regional District. Hartland Bike Park’s popularity not only reflects its mountain biking terrain and technical training area, but also the infrastructure associated with the Park, including the available parking, washrooms, information kiosks with maps, and bike wash for riders at the main staging area.

Moab, Utah – DiscoverMoab.com

The American Mecca of mountain biking that became famous among mountain bikers for its technically challenging Slick Rock Trail has developed from a small mining town that shunned weekend adventurers into one that now embraces them. Although there is a high level of market awareness of Moab, and the community has been transformed into a multifaceted destination that caters to a wide range of interests, it still makes a significant effort to welcome visitors and keep them informed. Operated by the Moab Area Travel Council, DiscoverMoab.com is the main source of information for planning a trip to Moab and offers complete listings of all services with details on parks and trails, including maps.

Regional Collaboration

Sea to Sky Trail – Taking a Regional Approach to Trails

First conceived in 1991, the Sea to Sky Trail is a non-technical, multi-user mountain bike trail connecting Squamish to D’Arcy. Future phases expand the trail from Horseshoe Bay to Lillooet. With multiple regional partners, including Squamish-Lillooet Regional District, Trans Canada Trail, Whistler Blackcomb Foundation, Village of Pemberton, District of Squamish, Resort Municipality of Whistler, and the province, support for this project continues to be strong. In partnership, the trail has evolved to include a strong signage program that celebrates the natural setting and human and cultural history of the area, which enhances the environmental, social and cultural benefits for both visitors and residents.

7stanes, Scotland

The 7stanes project is a well-known success story within the mountain biking industry. The project entailed building seven mountain bike centres in the south of Scotland over a period of three years. The 7stanes project, however, was not completed in isolation; it was part of a broader national cycling strategy. The success of the 7stanes is due primarily to its regional approach. The creation of seven centres in seven communities, each with its own unique experience, created a regional product in southern Scotland that gave bikers an excellent reason to travel to the region and stay several days. This would not have been possible with just one centre acting alone.

Sierra Buttes Trail Stewardship – Downieville, California

The Sierra Buttes Trail Stewardship is a non-profit organization dedicated to the preservation of trails, and access to those trails, in and around the Sierra Buttes region. They advocate for a “Healthy Trail System” which:

- improves local economies
- promotes active lifestyles
- enhances recreational opportunities
- sustains greater year-round residency

Their Mission is: “to preserve, enhance, and restore the trails of the Sierra Buttes region for diverse trail users through collaboration, education and stewardship.” By reducing erosion caused by all trail use groups - and minimizing the impact of trail use without restricting access - the historic and recreational value will be preserved for future generations to enjoy.

For greater details regarding collaborative strategies, please Part 5 of this report.

Sport Development

North Shore Mountain Bike League

The North Shore High School Mountain Bike League (NSMBL) is one of the oldest secondary school leagues in North America. This successful, flourishing and inspiring program includes mentorship, stewardship and friendship - all centered on creating the opportunity for high school-aged kids to ride and race mountain bikes cross-country with their peers.

Sprockids

The Sprockids Program is a multi-tiered approach designed to provide participants with the opportunity to experience success on a variety of levels. Through the sport of mountain biking, students develop a strong

sense of self-esteem, while discovering the potential within themselves. Sprockids has developed a program based on integrating mountain biking into every aspect of the school curriculum. The program can be used to make learning exciting and relevant in math, language arts, science, social studies, art, PE, personal planning, environmental studies, home economics, industrial education, counseling, and anger management. The Canadian Cycling Association now offers Sprockids as a nationally co-coordinated program that teaches four skill areas of cycling: safety, etiquette, riding (1st and 2nd gear), and bicycle maintenance.

Key attributes of the program include:

- participants have the ability to progress in all areas of the program at their own pace
- participants record progress in their personal “Passport”
- trained leaders instruct and evaluate
- teaches life skills - goal setting, problem solving, decision making, etc.
- develops positive philosophy - cycling and learning as life-long activities
- promotes values - respect for others, empathy, appreciation and responsibility for the environment

Trail Maintenance

North Shore Mountain Bike Association (NSMBA) – Trail Adoption Plan (TAP)

Vancouver’s North Shore trails have legendary status, but have some serious challenges when it comes to management and maintenance. The network crosses 3 municipal boundaries, incorporates Crown, Regional District and BC Parks land, receives some of the highest trail user volumes in BC and is situated in coastal rain forest. Faced with limited funding and volunteer capacity, in 2011 the NSMBA introduced the TAP program. TAP encourages local businesses and organizations to adopt a trail to support its ongoing maintenance. Trail adopters agree to an annual trail adoption fee (\$2750 in 2013) and providing volunteer support for up to six trail days throughout the year. In return, the adopting group receives guidance and instruction from a professional trail builder, recognition on signage at the trail head, updates on their trail’s progress on social media and in the NSMBA newsletter, as well as good karma and bragging rights for supporting a valuable community resource. “Utilize this opportunity to connect with the community and build spirit within your organization. Feel free to share your Adoption with a key partner to grow that relationship and

share in the pride that comes with ownership” is the message from Mark Wood, Program Manager for the NSMBA. TAP enlisted over 25 local businesses and organizations in 2013 and continues to grow. The Fraser Valley Mountain Bike Association (FVMBA) and the Whatcom Mountain Bike Coalition (WMBC) in Washington State have also implemented the TAP model.

Bike Friendly Accommodations

Accent Inns – Bike Love

Mandy Farmer, CEO of Accent Inns, is an avid mountain biker. Her passion for biking and the growing cycle tourism market led to the creation of a new service program implemented at all Accent Inn hotel properties in BC. Their Bike Love program offers:

- Ground floor rooms you can store your bike in.
- Bicycle wash and tuning station with a professional-grade bike stand.
- Advanced tool kit at your disposal.
- Rags for cleaning your bike.
- A laundry room in case it’s not just your bike that needs washing.

www.accentinns.com/special-offers/pets-bikes-more/bike-love

2.7 Mountain Biking BC

The mountain biking available in British Columbia is world class. The concentration of riding opportunities is incredible, so why would we dilute that message by failing to collaborate? To compete on the world stage as a destination for mountain bike tourism, the province and its diverse stakeholders need to take a unified and coordinated approach to communicate a clear message that features British Columbia as “the most diverse mountain biking destination in the world.”

Mountain Biking BC is a sector-lead strategy to develop a robust marketing platform to feature BC’s mountain biking destinations and the diverse riding experiences available in the province.

The program is funded through partnerships with market-ready mountain biking destinations and coop marketing funds from Destination BC’s Experiences BC program. Presently there are 20 communities and 4 resorts that are actively involved in this sector driven initiative.

The Brand

The Mountain Biking BC brand logo represents the natural elements and mountainous landscapes of British Columbia. “Mountain biking lives here”, the tagline, reflects the deep roots of the sport in every corner of the province.

Mountain Biking BC brand represents all mountain biking tourism experiences

Mountain Biking BC is a marketing program for the mountain bike tourism sector. The program was initiated in February 2011 in response to a key recommendation in the Provincial Mountain Bike Tourism Plan (March 2010). There are many promotional aspects to the program including a comprehensive mountain bike tourism website (www.mountainbikingbc.ca), social media, content development, advertising campaigns, contests, media relations, and consumer shows.

The MBTA began promoting BC mountain biking experiences in 2006 featuring lift-access downhill mountain biking under the Bike Parks BC brand. The experience gained from Bike Parks BC lead to the creation of the Mountain Biking BC in 2011 to showcase communities with authorized trails and to promote the diversity of mountain biking in the province. In 2013, BC’s mountain bike products were consolidated under the Mountain Biking BC brand while still representing each distinctive product offering whether they be community-based trails, lift-access bike parks, or backcountry adventure riding.

Website

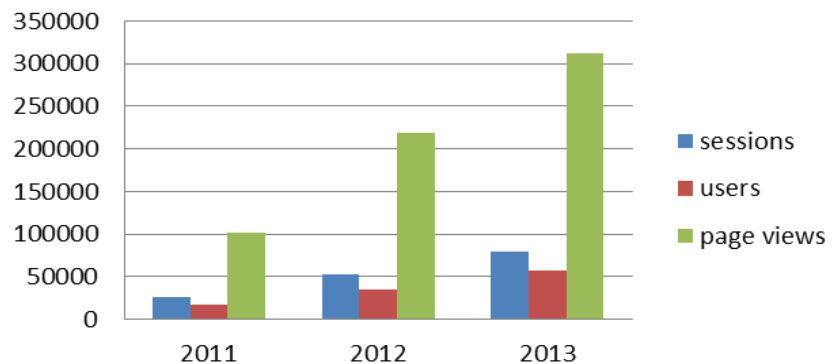
www.MountainBikingBC.ca offers partners the chance to share their signature riding experiences with the world. Partners control their own content and can convey the true character of their destination through images, video and a variety of relevant trip planning information categories that help visitors get the most from their stay. Search engine optimization techniques ensure the Mountain Biking BC website is among the top ranked sites in its category, providing an easy to find online resource for potential visitors and exposing partners to more web traffic than they could elicit alone. Since its inception, the website has seen excellent year over year growth in traffic.



Partner Content Support

Support is provided to ensure that partner content is updated regularly. Our content coordinator can assist with ideas for new content and can help source new local content contributors so that your content is as informative and eye catching as possible.

Traffic to www.mountainbikingbc.ca



Mapping functionality

A mapping feature was added to the Mountain Biking BC website in 2012. Digital mapping has become an important trip planning function especially for those that are accustomed to outdoor adventure. Our goal is to provide consumers with trip planning tools that identify precise locations of local signature trails and services. Consumers can download trail gpx files directly from the site to use on their own devices.

Regional Content

Regional content provides an overview of the unique qualities of each of BC's six tourism regions. This regional level information is designed to help consumers understand more about each region's diverse riding opportunities, significant visitor experiences, culture and characteristics.

Social Media

Social media channels are a major part of the consumer engagement strategy. SM community management is centralized, and builds on participation from partners to ensure genuine and authentic conversations with our online audience through active Facebook and Twitter content.





Contest

The 7-Day Giveaway Contest - The contest is designed to enhance consumer engagement, generate content through media involvement, and provide useful data for market intelligence. 2011 was the inaugural year for the contest and it has continued to be met with much excitement and anticipation through our online and social media promotions. Over 4000 entries are received each year providing valuable insights into our audience profile.

Media Relations

We contract qualified media specialists to generate unique stories and inspiring images about BC's mountain biking opportunities. A writer and photographer are invited to join our contest trip to capture a new experience each year. Assistance with any media inquiries and media visits is also available to our partners.

Advertising

High profile ad placement is purchased in key online publications and features MountainBikingBC.ca as the primary call to action in two campaigns. The Spring campaign runs from May to June and focuses on the 7 Day Giveaway Contest. The Summer campaign in 2014 will promote awareness for the diversity found in BC's 6 tourism regions highlighted by the new regional video series in partnership with Rocky Mountain Bicycles.

Events and Exhibitions

Partners are invited to share their mountain biking specific marketing materials at a variety of consumer shows, events and exhibitions attended throughout the year including Crankworx Whistler, Vancouver Bike Show, Seattle Bike Expo, and Calgary Outdoor Show.

Eblasts

With over 10,000 profiled email recipients we have the capability of targeting specific demographics and rider types with custom designed eblasts highlighting specific product offerings.



Video Content



Video content marketing has become one of the most important tools for getting consumers' attention. We encourage our partners to create their own high quality videos to share through our website and social media. Many projects have been supported or produced that showcase the diverse mountain biking experiences available in BC.

“Mountain Biking Lives Here” Regional Video Series – A new video series in partnership with Rocky Mountain Bicycles was initiated in 2013 with six episodes produced over a 2 year period. Each episode focuses on a different tourism region of the province and features not only the great riding available, but also introduce the audience to other experiences that help define each region's unique character. Each episode is promoted through a variety of channels by utilizing established media relationships held by both the MBTA and Rocky Mountain Bicycles.

Why this is Important

We need partner support to establish BC as a premiere mountain biking destination. BC can lay claim to its founding role in the birth and evolution of mountain biking. Mountain biking is a significant part of our culture and lifestyle. Collectively, we can develop the sector to its full potential, create new reasons for visitors to come to BC, increase tourism spending, and enhance local recreation opportunities.

Are You Ready?

We encourage you to participate in this initiative if you represent a community with solid grassroots support, authorized signature trails and the basic tourism infrastructure needed to support mountain biking visitors.

Basic requirements for partners include:

- Signature trail experiences with appropriate land-use approval, signage, and management framework in place.
- Tourism infrastructure with complementary services and attractions (accommodation, food & beverage, bike shop, tourist information resources).
- Willingness to work with the tourism industry and to develop and maintain local mountain biking experiences.

- Capacity to generate and update local content to support promotions and online information related to mountain biking visitor interests.



City of Terrace from the Top of the Terrace Mountain Trails Network

PART THREE

MOUNTAIN BIKE TOURISM MARKET ASSESSMENT

The following section provides an overview of the mountain bike tourism market, the economic trends and historical performance as well as the mountain bike tourist and visitor profiles and the implications for Northern BC.

3.1 Mountain Bike Tourism Market Potential

Adventure Tourism Continues to Grow

It is widely acknowledged that activity and adventure tourism, including mountain biking, is one of the fastest growing segments of niche/special interest tourism. In Canada, for example, 'eco-adventure' trips are generally categorized as the most popular type of travel behaviour after visiting friends and relatives, noting growth of 15% per year (Canadian Tourism Commission 2008). One aspect in the evolution of mountain biking is the shift from being a localized recreational activity to a tourism product (Koepke, 2005; Tourism BC, 2011).

Mountain Bike Recreation & Tourism Continues to Grow

Mountain bike recreation and tourism is a significant and growing market around the world. Participation rates in the sport are increasing with the United States, Canada and Australia/New Zealand showing the highest participation rates globally.

According to a study completed on Mountain Biking Tourism in the Yukon, participation levels grew worldwide by over 400% between 1987 and 2000. With respect to Canada, it is estimated that the mountain biking market size is about 3-4% of the population (Koepke, 2005).

Recent studies from across BC highlight participation rates of riders. From October 2008 – September 2009, 21% of British Columbians participated in trail mountain biking (Tourism BC). In the US, for example, cycling – which includes road biking, mountain biking and bmx – is the 3rd most popular outdoor activity with 15% of the population or 42.3 million people participating (Outdoor Foundation, 2013). These studies confirm that mountain biking is indeed becoming a popular sport globally, nationally and locally.

High Awareness of BC's Reputation for Mountain Biking

BC has an excellent reputation within the mountain biking community as a top destination and across the province, mountain biking is now being recognized for its tourism potential. Of all trail-based activities mountain biking tourism is the activity that has the most significant contribution to economic growth and diversification (Harkies, 2011).

3.2

Mountain Bike Recreation & Tourism as an Economic Generator

Mountain bike tourism is a strong economic performer that can generate significant economic activity, tax revenues and employment opportunities

The economic impacts and benefits of mountain bike tourism have been well established through a substantial number of studies from around North America and the United Kingdom. The Northern BC Mountain Bike Tourism Strategy initiative was intended to review the existing research and identify key trends and implications for Northern BC as well as to establish whether there is a strong business case for investing in and developing mountain bike tourism across the region through a regional approach.

The following section provides a summary of the key highlights of the research that was reviewed as part of this project. (The full Mountain Bike Research & Literature Report is attached as Appendix D to this report.)

These studies indicated that mountain bike tourism is a strong economic performer that can generate significant economic activity, tax revenues and employment opportunities for communities. The economic activity generated comes from attracting visitors to experience the trail networks as well as to participate in mountain bike events and festivals.

Sea to Sky Corridor

Mountain Bike Tourism Generates Significant Economic Activity

The 2006 MBTA Economic Impact Study estimated that the trail systems of the North Shore, Squamish and Whistler generated \$10.3 million in spending from riders that live outside the area resulting in \$9.3 million in new economic activity. It was also calculated that this economic activity directly supports nearly 200 jobs in the region. Mountain bike tourism is estimated to generate \$4.6 million in tax revenues for all levels of government throughout the corridor

In the region mountain bike events are a large economic driver. In 2006, the non-resident expenditures at the Whistler Crankworx Mountain Bike Festival was in excess of \$11.5 million. The total expenditure of non-residents at the Test of Metal Event held in Squamish was estimated at nearly \$600,000 (MBTA, 2006).

Mountain Bike Travellers Spend

Riding party expenditures in the Sea to Sky area varied from \$48.32 per person per day for an overnight trip to the North Shore to \$113.13 for visitors to the Whistler Bike Park. Visitors to Squamish spent \$53.94 per person per day while visitors to the Whistler Valley had expenditures of \$93.48 per person per day (MBTA, 2006).

Mountain bike tourism generates significant economic activity for the Sea to Sky Corridor:

Over \$10 million in spending from trail riders in 2006

\$9.3 million in new economic activity

Up to 200 jobs

\$11.5 million in spending generated by the Crankworks festival

\$600,000 in expenditures during the Test of Metal in Squamish

\$4.6 million in tax revenues

Rossland and Golden

Outside of the Sea to Sky Corridor, mountain bike tourism generates significant economic activity for smaller more remote communities around the province.

In 2011, the MBTA undertook similar studies to the one conducted in the Sea to Sky Corridor to understand and determine the economic impacts of mountain bike tourism in smaller more remote communities throughout the province. The two communities included Rossland in the south central interior of the province and Golden within the Crowsnest Past near the Alberta border. The results were impressive and showed that mountain bike tourism can also be a significant economic driver for smaller communities.

Mountain Bike Tourism generates significant benefits for communities throughout the province:

Rossland: Nearly \$600,000 in visitor spending

Golden: nearly \$1 million

Cariboo Chilcotin: \$1.6 million annually

Rossland

Mountain bike visitors to Rossland spent a total of \$589,000 and their spending had the following associated impacts on the province:

- Total output (revenue) of \$362,000
- GDP of \$290,000 in all supplier industries
- Commodity taxes (HST, GST, fuel and other taxes) of \$122,000 paid directly (or embedded in the cost of goods purchases) by mountain bike visitors
- Taxes paid by supplier industries of \$35,000.

Golden

Mountain bike visitors to Golden spent a total of \$930,000 and their spending had the following associated impacts on the province:

- Total output (revenue) of \$656,000
- GDP of \$518,000 in all supplier industries
- Commodity taxes (HST, GST, fuel and other taxes) of \$161,000 paid directly (or embedded in the cost of goods purchases) by mountain bike visitors
- Taxes paid by supplier industries of \$66,000.

Cariboo Chilcotin

The Cariboo Chilcotin region including Williams Lake, 100 Mile House, Quesnel and Wells have formed a strategic alliance with the Cariboo Mountain Bike Consortium and have developing significant trails and infrastructure. A study of the impacts in 2012 found the following impacts:

- Direct mountain bike visitors spending estimated at \$294,538
- Activity at regional mountain bike businesses estimated to be \$1.61 million annually
- Total economic value of the sector is estimated to be over \$2 million annually

Oregon

There are numerous locations around the world that are establishing themselves as significant destinations for mountain bike recreation and tourism. There are a substantial number of communities pursuing these opportunities throughout the United States including Park City and Moab Utah, as well as others in Washington, Colorado, Idaho and elsewhere.

The state of Oregon has actively pursued the development of mountain bike tourism and has monitored and evaluated the impacts of mountain bike related events.

- Average expenditure per person per day was \$99, weighted equally across four festivals. The average expenditure per travel party, by event, was: \$1,680
- The total tourism spending for the 4 events was \$2.6 million
- Three measures of economic impact (sales, labor income and jobs) were estimated for the 4 events. After the multiplier effect was applied, the total sales impact was \$3.7 million (McNamee, Main and Hashimoto, 2013)

International Destinations

There are numerous regions around the world that have developed highly successful mountain bike tourism destinations.

7Stanes Scotland

One of the most successful has been the 7 Stanes Region of Scotland which has involved the development of 400km of high quality single track trail experiences that attracts nearly 400,000 visitors and generate nearly \$16.4 million (CAD) in visitor spending annually.

Mountain Bike Tourism is Serious Business

Clearly, mountain bike tourism is resulting in significant economic activity for destinations of all sizes and can result in substantial opportunities for communities.

3.3 Mountain Bike Travellers Profiles

A critical part of this initiative was to develop an understanding of the key demographics of the mountain bike tourism market and the implication for Northern British Columbia.

This report developed the following Rider and Visitor Profiles through the Market Research & Literature Report (Appendix D), the Mountain Bike Travellers Focus Group (Appendix B), and the Mountain Bike Travellers Survey (Appendix F).

This project endeavored to address the following questions:

- Who are mountain bike travellers?
 - What is the demographic and socio-economic profile of mountain bike travellers?
 - What are their spending & travel habits?
- What are they looking for?
 - What type of experiences are they seeking?
 - What are their motivations for travel?
 - What types of services do they require?
 - What types of accommodations and services are they seeking?
 - What supporting amenities do they require?
- How are they selecting their destinations?
 - What information sources are they using?
 - What kinds of information are they seeking?
 - What are the critical factors for selecting destinations? Travel planning?

The Ideal Mountain Bike Trip

The Northern BC Mountain Bike Tourism Strategy endeavored to gain an understanding of how mountain bike travellers perceive their 'ideal trip' and the implications for Northern BC.

Results suggest that trails (number, variety, challenge) are paramount to the mountain bike travel experience, followed by riding companions / friends to share the experience, and the riding itself.

The figure below presents an analysis of the comments that were gathered through the Mountain Bike Travellers Survey and provides a perfect picture of the priorities and issues considered in the 'rider's mind' when considering and selecting potential destinations – the size of the typeface represents the frequency words/themes appeared in respondents' descriptions.

Elements Contributing to an Ideal Mountain Bike Trip



"A mix of technical and flowy, with scenery as a nice bonus. Love bridges & berms, snaky single track. Somewhere you could do different trails each day, in a temperate climate. I love downhill riding but not sure I'd want to ride up every day so perhaps not much of that!"

"A trip to anywhere new or with great trail or views. Friends make it all the better and more memorable. A week is ideal since most places you go it is really hard to check all the boxes in a weekend."

"A 3-4 night stay in a mountain bike friendly town. Either camping or stay at a condo with 3-4 friends. No wives, no kids. Just bikes, new trails, beer and good food."

Mountain Bike Travellers Survey 2014

Who Are Mountain Bike Travellers?

The following provides an overview of the demographic, socio-economic profiles of the mountain bike tourism market along with travel habits and preferences

Demographic Profiles

Still a male dominated sport - the Travel and Motivation Study (TAMS) from BC highlighted that (75.5%) were men, while women represented about one-quarter of the market (TAMS BC, 2007).

Mountain bike travellers are a relatively homogenous market – overwhelmingly male, young to middle aged and experienced riders.

There is some disparity in income levels, with the largest group (29%) having incomes exceeding \$100,000. The next largest group (19%) earns less than \$25,000 per year.

Mountain Bike Travellers Survey 2014

More women entering the sport - between 2002 and 2003 in the US, women's participation in the sport increased 33.9% as compared to 5.6% growth overall (Mountain Bikers of Santa Cruz, 2007). Other indicators of women's increased participation are the number of bike manufacturers offering women-specific bikes and the emergence of bike clinics, camps and tours catering to women (Harkies, 2011).

More families are mountain biking – more destinations are finding that more families are travelling with mountain biking as one of their primary motivations. Many resorts, events and festivals are recognizing this demand and responding by providing specific family friendly services including the following:

- Daycare and child-minding during races & events
- Children specific events and activities
- Providing information on child and family appropriate trails
- Building bike parks and facilities specifically geared towards children and families

Not only for youth - with respect to age, mountain bikers tend to be older than one may think. For example, the TAMS BC study from 2007 found that 1-in-5 of riders are young adults (18 to 24 years), while 50% are between 25 and 44 years of age. (TAMS BC, 2007).

Socio-Economic Profiles

It has been well established through numerous studies that mountain bikers tend to be affluent and well educated. A 2009 Destination BC study completed on Mountain Biking and Cycling found that roughly 34% of BC residents who rode on trails had a household income of \$100,000 or more.

Mountain bike travellers to BC are also very affluent with one-third of Americans and almost half of Canadians having a household income in excess of \$100,000 (TAMS, 2006). A survey completed of mountain bike

events in Oregon found similar results: 43% of the respondents reported an annual household income between \$100,000 - \$199,999, and 29% reported an annual household income of \$200,000 or more (McNamee, Main and Hashimoto, 2013).

Additionally, a number of studies have found that mountain bikers are highly educated, with as many as two-thirds having at least college education (Koepeke 2005; Reiter and Blahna 2002).

Ultimately, these findings suggest that two prevalent mountain biker groups can be distinguished: fairly affluent young to middle age professional people and university/ college students (Reiter and Blahna 2002).

Travel Habits & Preferences

Mountain Bikers are Motivated to Travel

Mountain biking is an important travel generator as 91% of respondents have travelled to ride in the past 3 years and 92% intend to travel in the next 2 years.

The majority of mountain biking trips are short (2-3 nights), but a portion of the market is open to taking longer trips if the destination warrants it.

Bike Travellers Survey, 2014

Studies have concluded that mountain biking and world-class trail networks are travel motivators and riders are willing to travel great distances to destinations specifically to go mountain biking (Harkies, 2011; MBTA, 2006; Tourism BC, 2008). Mountain bikers travel for a number of reasons including being bored with local trails, having a desire to try new trails, an appreciation for varied terrain and scenery and or looking to combine mountain biking with vacation travel (Corporate Research Associates, 2010).

The following statistics reinforce the notion that mountain biking is a travel motivator:

- For Canadian travellers in BC, 17% participated in a cycling activity while traveling and 5% (270,000) stated that cycling was their prime motivation for an overnight trip (Tourism BC, 2009)
- For American travellers in BC, 14% participated in a cycling activity while traveling and 5% (350,000) stated that cycling was their prime motivation for an overnight trip (Tourism BC, 2009)
- A 2013 study on mountain biking events in Oregon found that 65% of respondents had travelled from outside of Oregon to attend an event and included residents from 28 different US states and 4 countries
- A 2014 study of mountain bikers in Squamish found that 75% of riders were visitors. This number jumped to 85% on the landmark trail, Full Nelson, which underscores the importance of signature trails to driving tourism

Party Size and Length of Stay

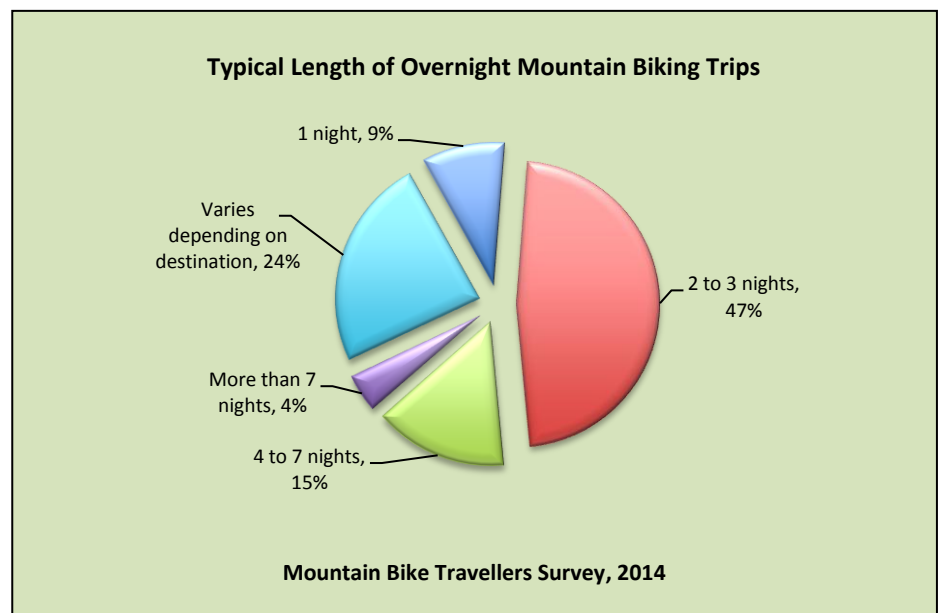
Several studies including the Squamish Off-Road Cycling Association Study (2014), Cariboo Mountain Bike Consortium Regional Study (2012), McNamee, Main and Hashimoto (2013) study on festivals in Oregon and the MBTA Sea to Sky Mountain Biking Economic Impact Study (2006) have all captured data on mountain bikers' typical party size and length of stay. Generally, they found mountain bikers travel in groups of roughly 3 people that stay overnight for at least a few nights. Specific results are as follows:

Sea to Sky – North Shore, Squamish and Whistler (2006)

- Average party size is 2.8 people (80% day trip, 20% overnight)
- Average length of stay for overnightriders was 4.8 days

Oregon Festivals (2013)

- The average travel party size was 2.98 people across all four events and average length of stay in the county was 3.9 nights



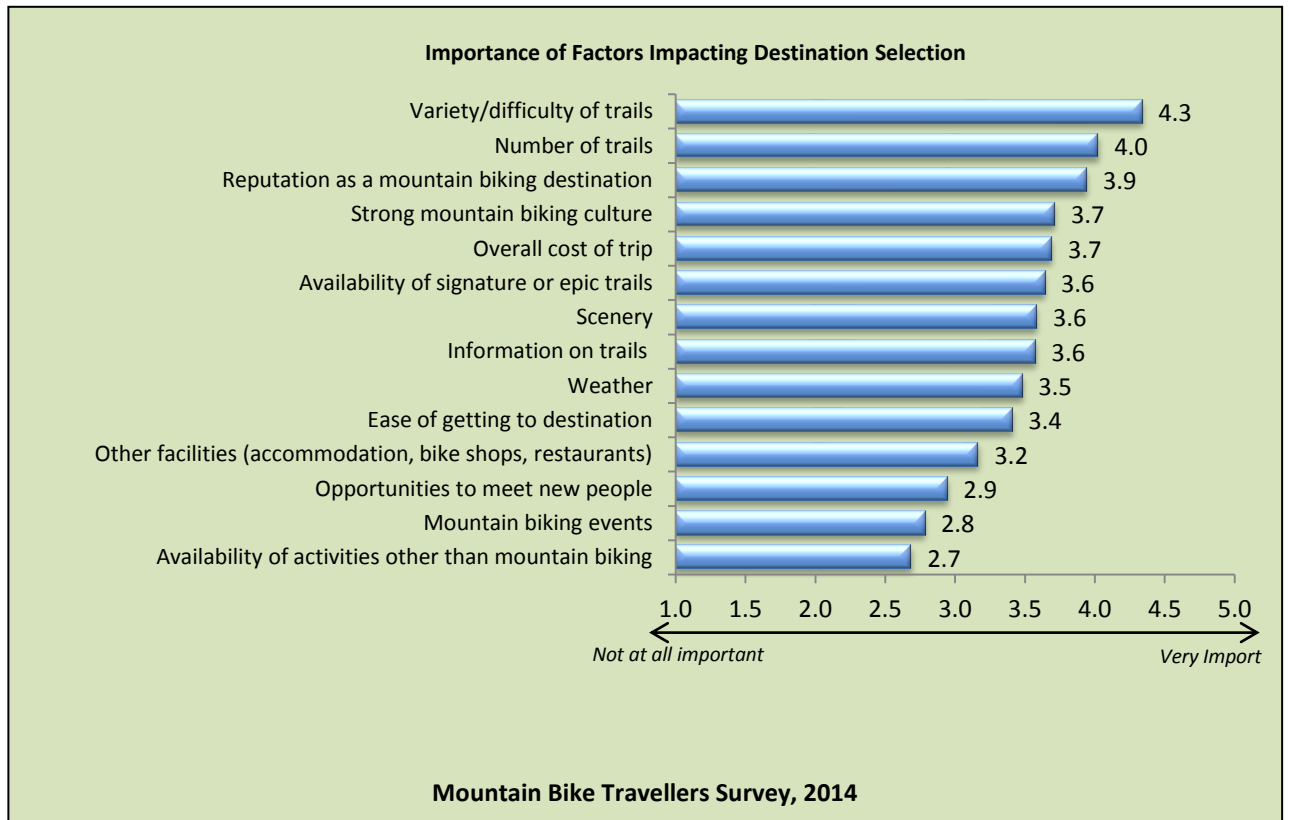
Destination Selection

What are the key elements utilized by mountain bike travellers to select mountain bike destinations? What are mountain bike travellers looking for?

There is a considerable amount of research documenting what mountain bikers take into consideration when planning their trips, what activities they undertake and where they obtain their information on potential destinations. The following section discusses how mountain bike travellers select their destinations, how they gather information and what their preferred resources are.

As shown in the Figure below, there a broad range of key factors included in process of selecting destinations. These include:

- Trails: type, variety and volume, topography, the challenge / adventure of riding somewhere new
- Riding companions: sharing the experience, typically with friends
- Culture: local food and drinks, interacting with locals, destination atmosphere, history, scenery
- Costs
- Availability of signature trails
- Weather & seasonal considerations
- Time and ease of getting to destination
- Opportunities to meet people
- Events & festivals
- Range of accommodation options: camping, cabins, motels, lodges
- Other activities: e.g., climbing, yoga, swimming, photography, wildlife viewing



Trails are the product

"I would say it comes down to the trails. If there are no trails, you aren't you going to go there. Of the 20 things I think of when planning a trip, trail variety is probably the key word."

Focus Group Participant

Diversity, variety & challenge - are the top consideration for mountain bikers when they are selecting a destination. Trails are the core component and resource base of the mountain bike tourism product, however; having great trails is only a piece of the puzzle. Figure X below documents the importance of destination attributes in the destination selection process. Results confirm the importance of trails in destination choice – mountain bike travellers seek variety/challenge first and foremost (4.3 on a 5 importance scale) followed closely by number of trails (4.0 rating). Interestingly, the availability of signature or epic trails is a lesser draw (3.6 rating) suggesting that a network of trails, which offer a visitor variety and challenge is the key criteria for success as a mountain bike tourism destination.

Unique experiences - Trails need to offer riders a unique experience that allows them to connect with the land and local culture.

Quality over quantity – though the volume of trails available plays a strong role in the selection process for mountain bike travellers, it is important to note this refers to what would be considered high quality, single track riding experiences. It also does not necessarily mean each community must have

an extensive trail network. For example, a multi-day trip could include visits to several communities that collectively offer the diversity of riding experiences a visitor seeks.

Trail Standards: trails need to be of the highest standard. They should be designed, planned and built by an experienced team with the knowledge and capacity to do so. Trails must be authorized and maintained on a continual basis (Alliance Action Sports Experts, 2013; Tourism BC, 2008).

Other Key Selection Criteria

Travel & Transportation – as highlighted in the figure above, the volume of trail opportunities is paramount for mountain bike travellers when selecting potential riding destinations. The importance of this criterion dramatically increases the greater the travel required to reach the destination and access the trails. The amount of time it takes to reach a destination combined with the volume of trail experiences is used as a means for narrowing destination choices. A general rule of thumb used by the International Mountain Bike Association is that mountain bike travellers seek approximately 1 hours of riding for every hour of drive time. If it takes four hours to reach a destination, there should be at minimum four hours of corresponding riding opportunities.

Seasonal considerations - also play an important role in the selection of a destination. Many mountain bike travellers will seek out certain destinations that are more suitable at particular times of the year. For example, riding in Arizona is ideal in the winter, but it's too hot in the summer. Participants prefer to stay close to home in the summer months when the trails are in optimal condition.

Reputation – as a mountain bike tourism destination also figures prominently in the selection process (3.9 rating). This again underscores the importance of encouraging visitors to share their experiences with others. Reputation is also built and spread by influential mountain biking websites such as Pinkbike, underscoring the importance of bringing influential riders and writers to a community and having them document and share their experiences.

Mountain biking culture – is also an important consideration in the destination selection process (3.7 rating). As noted in other project reports, mountain bike culture cannot be precisely defined. Rather, prospective visitors seek destinations which make mountain bikers feel welcome and offer compelling and authentic experiences, which can range from a quirky local pub offering a good selection of craft beer to locally owned bike shops and eateries. Culture can also be fostered by drawing on a destination's past. For example, Cumberland, on Vancouver Island has a fascinating history as a coal mining and forestry town. Trail names and features draw

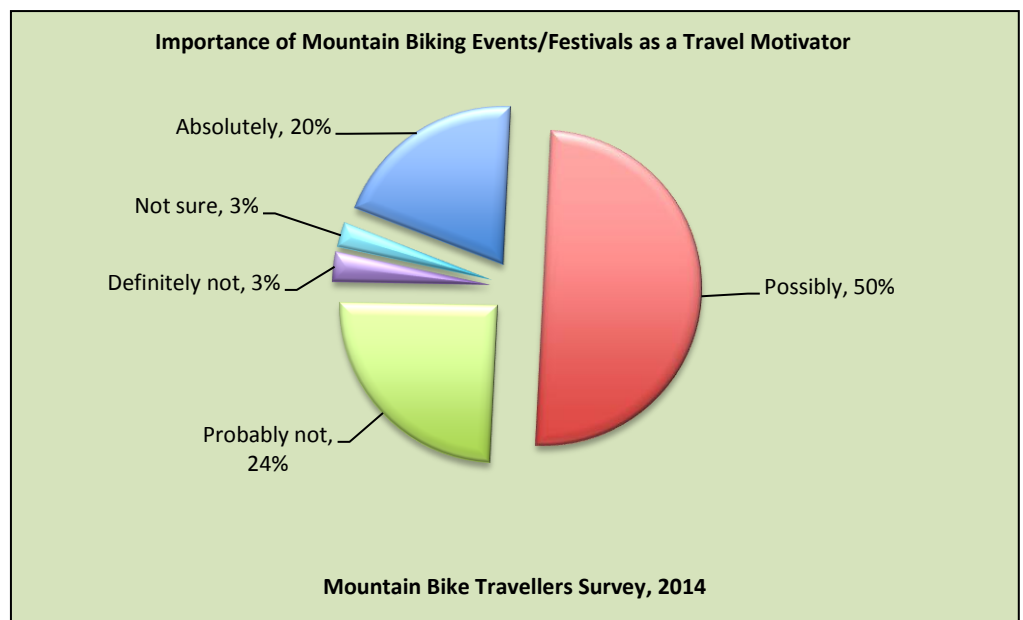


on the town's past and help foster a mountain biking culture unique to the destination.

The overall cost of the trip – is also a relatively important consideration for all mountain bike travellers. Not surprisingly, the importance of trip cost decreases as income increases.

Events & Festivals – mountain bike events as an economic 'tactic' are being implemented across the province and are an important part of mountain bike culture as they can generate significant tourism dollars (Cariboo Mountain Bike Consortium, 2012). Interestingly, mountain biking events and festivals appear to have a minor role in the destination selection process (2.8 rating). While they may be important for sub-segments of the mountain biking market, it appears the majority of mountain bike travellers do not actively seek them out.

As part of the Mountain Bike Travellers Survey, the respondents were asked whether they would be motivated to travel to a destination for an event or a festival. As Figure X shows, 20% of mountain biking travellers indicate a festival/event would absolutely induce them to visit a destination, while a further 50% indicate it might. Further analysis showed that US residents are the most likely to fall into the 'absolutely' category, while Canadians, particularly Albertans, are less enthusiastic about festivals and events. Since festivals and events tend to attract a local and regional crowd, destinations must be realistic about their ability to attract tourists.



Supporting Services & Amenities

Mountain bike specific services are essential including: bike shops and service, bike rentals, mountain biker friendly accommodation, restaurants and public transport.

Maps & Signage: Other key infrastructure pieces include information sources, maps, signage and directions and trail head facilities (Tourism BC, 2008).

Bike shops: are recognized as a key resource, especially in destinations without good planning resources. They are seen as local experts for trail recommendations, maps, trail conditions, shuttle services, etc.

Amenities: destinations need to have supporting infrastructure e.g., restaurants which are open at night, grocery stores, laundromats, showers, fuel, liquor stores, cell reception, Internet access, etc.

Ancillary Activities: additionally, when mountain bikers travel, they are partial to undertaking other outdoor activities including visiting national and provincial parks, camping, swimming, fishing and hiking. Although not the main motivation for their trips, cyclists and mountain bikers are attracted to a destinations' cultural, culinary and retail infrastructure on overnight pleasure trips (Tourism BC, 2007).

Accommodations

The availability of appropriate accommodations that meet their needs is one of the key decision making criteria for mountain bike travellers. While there is no certainty around the 'ideal accommodation' type for mountain bike trips (preferences ranges from camping to full-service hostel), mountain bike travellers prefer destinations that offer a range of options.

In terms of accommodation preferences, mountain bikers are enthusiastic campers. The Mountain Bike Travellers Survey asked respondents about their preferences. As the figure below shows, 40% of respondents indicated a preference for camping. The appeal of camping decreases with age as those under 25 years are the most likely to prefer it. Camping appeal also varies by residency as well with BC residents and Americans being the most enthusiastic about it. Income also impacts the popularity of camping, with those falling into the lowest income group (< \$25,000) having the greatest interest.

Following camping, almost one-third of mountain bike travellers voice a preference for small-scale local accommodation (lodges/inns/motels). These visitors tend to be older and have higher incomes. There is considerably less interest in larger hotels, likely because mountain bikers prefer small locally owned accommodations.

"Some communities like Sun Valley do a tremendous job of providing maps and tools... length of trail, loops versus out and back, trail difficulty, etc. Not many towns have that though; including Squamish and Whistler... this is where bike shops provide a critical service."

Focus Group Participant

Squamish (2006)

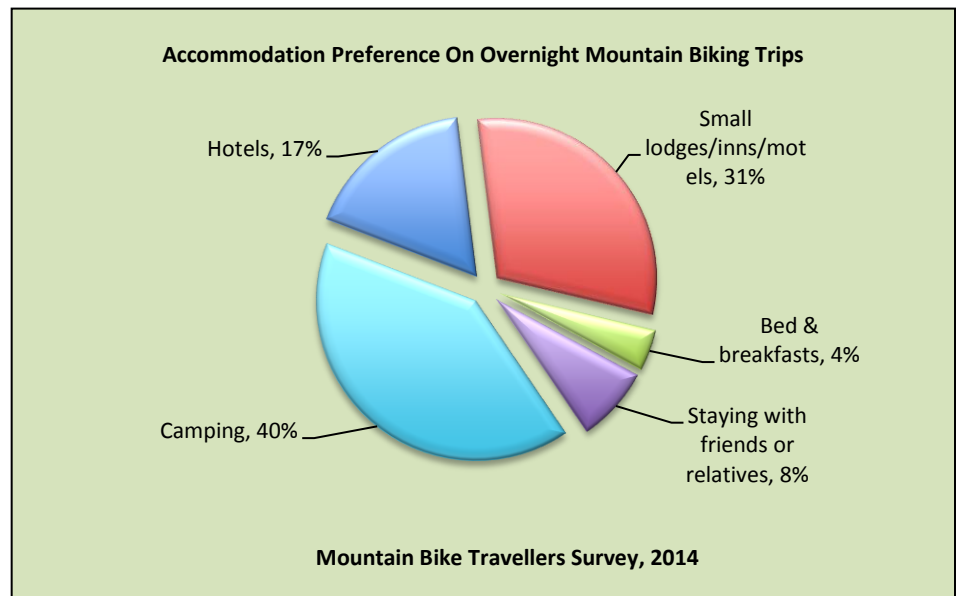
- Overnight riders to Squamish average length of stay is 3.2 nights, with camping being the most common type of accommodation used

Cariboo Region (2012)

- The majority of riders were less inclined to stay in hotels and rather camp or stay with friends

IMBA (2003)

- 45% prefer camping, 40% small lodges or inns, 8% per cent hotels



Key Elements for Selecting Accommodations

These findings suggest emphasizing a destination's camping opportunities and smaller accommodation options is important when trying to attract mountain bike travellers.

There are a number of key elements that drive the decisions mountain bike travellers make regarding accommodations. These include the following:

Proximity to trails – mountain bike travellers will travel to seek out new and exciting mountain bike experiences, but want to be close to the action once they arrive, with a strong preference on the ability to ride to trail networks from wherever they are staying. Recognizing this demand, some

accommodations are beginning to provide maps and instructions on how to reach the trails directly from their establishments.

Mountain Bike Friendly Options – mountain bike travellers will seek out and patronize accommodations that provide a welcoming atmosphere and actively seek to accommodate their needs. These can include convenient bike security, bike washing stations as well as shuttles and other forms of transportation. Bike security is not always as simple as providing a room for locking up bikes. Mountain bikes are often one of the most expensive and coveted items mountain bikers possess, and having a secure room with limited access that is still convenient is a top priority. Motels are a popular selection due to the convenience and ease of bringing bikes into rooms. Some establishments are beginning to provide tools and spaces to work on bikes as well as explicitly allowing the storage of bikes in rooms.

Trip Planning & Information Sources

What Sources of Information are used by Mountain Bike Travellers to Select Destinations?

"I read it (online posts) and then I then do further research. You hit Youtube and start watching trail footage to make sure it's the type of trail you want... personal opinion is just that."

"It's usually where my group of friends want go. Sometimes those postings help bump up locations on my list though. I might see one posted somewhere that describes the trail network so well that I have to go there."

Focus Group Participants

According to Tourism BC, mountain bikers start a trip planning process with a destination in mind. Studies completed by the IMBA on riders in the US (2003), a study on Moab, Utah (2002) and one in BC (2009), determined that word of mouth and advice from friends is the number one way people choose a destination for mountain biking. The Internet is also a popular means of finding information, as well as the reputation of a destination. Somewhat surprisingly, a 2006 study on mountain biking in Squamish found that only 1% of non-residents riders obtained their destination info from a magazine compared to 43% by word of mouth (MBTA, 2006).

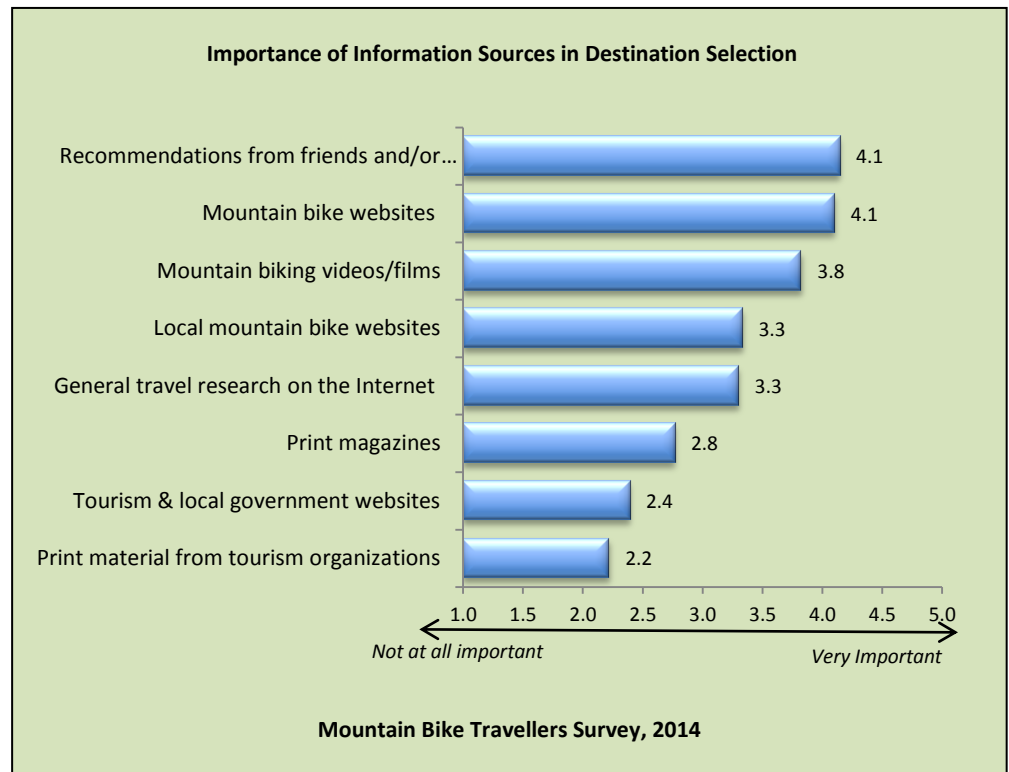
The Figure shows which factors have the greatest influence in the selection of a mountain biking destination.

Personal recommendations emerged in top spot (4.1 on a 5 point importance scale) followed closely by mountain bike specific websites. This finding underscores the importance of encouraging visitors to share their experiences with their networks, ideally via social media channels.

The importance of **mountain biking websites** in influencing destination choice is also noteworthy. This suggests destinations should be encouraged to host influential riders and writers and have them share their experiences on mountain biking websites.

The influence of **mountain biking films and videos** is important to highlight. Online reviews are influential, but not always seen as credible.

Results show the **declining influence of print materials** as even mountain biking specific magazines are seen as important by relatively few respondents.



An important finding is the lack of importance mountain bike travellers place on more general travel information provided by tourism organizations particularly print publications. ***Rather than target mountain bike travellers through generic tourism resources, the tourism industry is encouraged to work with mountain bike specific websites*** to promote their destination's attributes.

The importance of recommendations/reputation

Mountain bike travellers rely on personal recommendation when choosing a mountain bike destination. They prefer first-hand recommendations (from friends or family who have visited), but see mountain biking websites almost as credible. To be a successful mountain bike travel destination, Northern BC must find ways to get visitors to share experiences with their networks. Encouraging influential riders and writers to visit and share their impressions on prominent mountain biking websites (e.g., pinkbike) is also important. Also noteworthy is mountain bikers disdain for generic tourism information. Thus, the tourism industry is urged to work with mountain bike specific websites to reach the market.

Mountain Bike Travellers Survey, 2014

PART FOUR

4.1

ASSESSING THE MARKET OPPORTUNITIES FOR NORTHERN BC

Northern BC as Mountain Bike Recreation & Tourism Destination

"I think that riding in Northern BC would be really awesome, however, I know almost nothing about it. It would be nice if the mtb community if Northern BC had more exposure."

"I've heard about a couple of places, but not a lot. Most of the people talk about Whistler because it is a well known place (here in Mexico) for skiing/snowboarding."

I do most of my riding of new places because of 'word of mouth', and I haven't heard anything from anyone I ride with regularly about Northern BC's opportunities."

**Mountain Bike Travellers Survey,
2014**

A key element of the Northern BC Mountain Bike Tourism Initiative was to gain an understanding of the level of awareness and perceptions of the region among the mountain bike tourism market. This objective was addressed through the Mountain Bike Travellers Focus Group and the Mountain Bike Travellers Survey. Both of these activities provided significant insights and information regarding the level and nature of awareness that currently exists with regard to Northern BC as a mountain bike recreation and tourism destination. The full reports for both of these activities are attached as Appendices X & Y to this report.

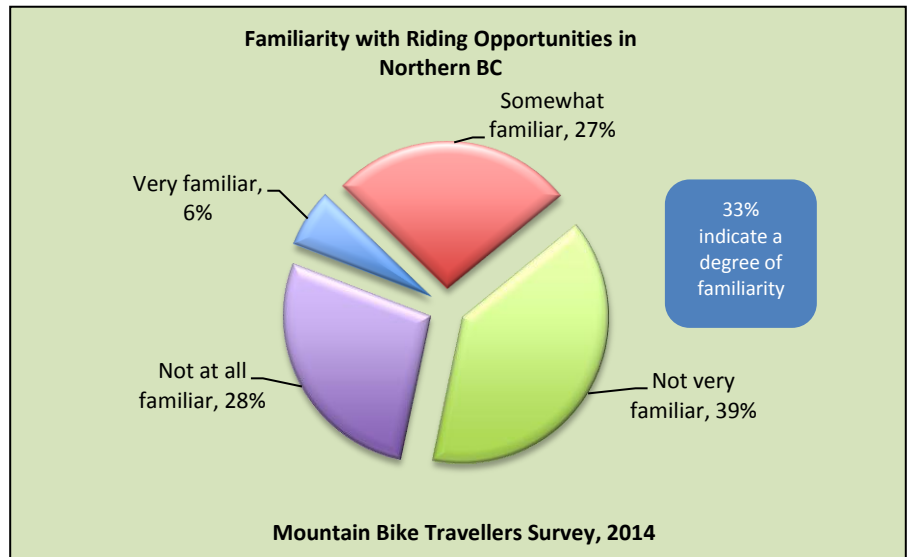
The findings are summarized and discussed below.

Awareness & Familiarity of Northern BC as Mountain Bike Destination

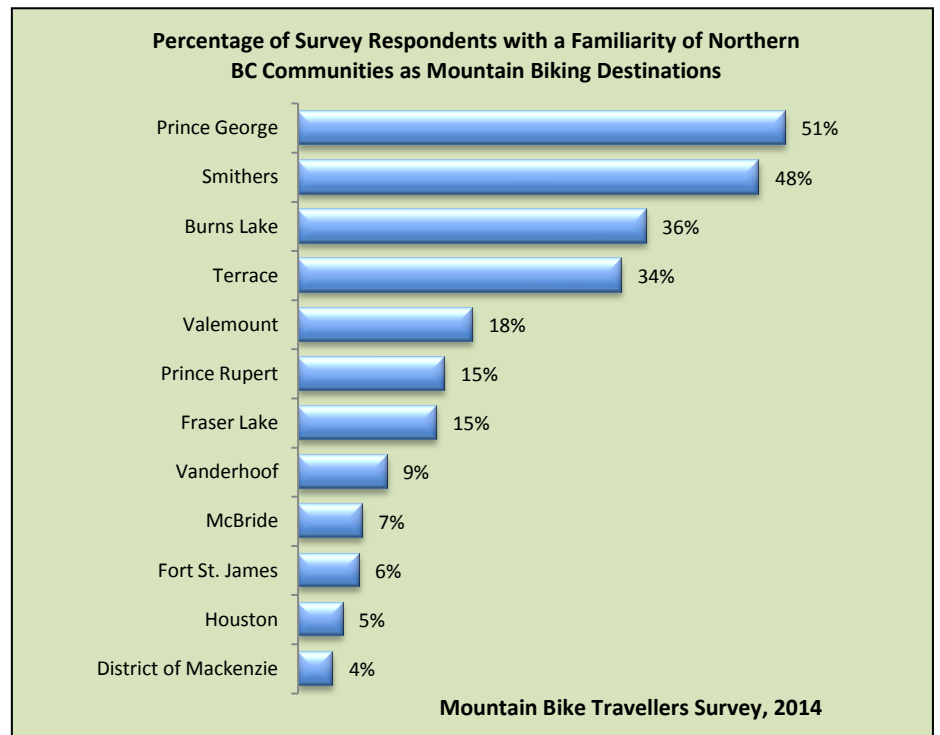
Generally speaking, the participants in the focus group and the Mountain Bike Travellers Survey respondents expressed a lack of general knowledge of Northern BC as a mountain bike destination. It is not surprising then that the level of mountain bike specific knowledge regarding the region was also minimal.

When the prospect of mountain biking in Northern BC was raised during the focus group, the initial reaction was ambivalence. As the discussion progressed, however, there was some acknowledgement of Burns Lake, Terrace and Smithers as emerging riding destinations.

The degree of awareness and familiarity of Northern BC among mountain bike travellers was further explored through the online survey. The survey results indicate that there is an interest in Northern BC, but awareness of the region and its features is very low. Just one-third of respondents indicated some familiarity of riding opportunities in the region as a whole and knowledge of specific communities were very low. Just 5% of the survey respondents indicated that they had visited Northern BC for mountain biking.



Prince George enjoys the highest levels of familiarity followed closely by Smithers, with Burns Lake and Terrace trailing by a considerable margin. While respondents were specifically asked to assess their familiarity with communities as mountain biking destinations, it is possible that Prince George captured the largest share of mentions since it is the region's largest city. While these results are open to interpretation, the fact remains that Prince George, Smithers, Burns Lake, and Terrace are the region's most well known riding destinations, with other communities registering little recognition.



Impressions of Northern BC as Mountain Bike Tourism Destination

"It's the logistics – I wouldn't know where to start. It's the reason we haven't been to Burns Lake."

"I would need to know there is more trails than drive".

"The whole reason we don't go as we don't travel typically in the summer... we stay here (southern BC) and then head south or overseas in the winter."

"It's such a long slog... we like to drive 4 hours and then ride. There is a lot of emptiness. This is why it (Northern BC) hasn't been a priority."

Focus Group Participants

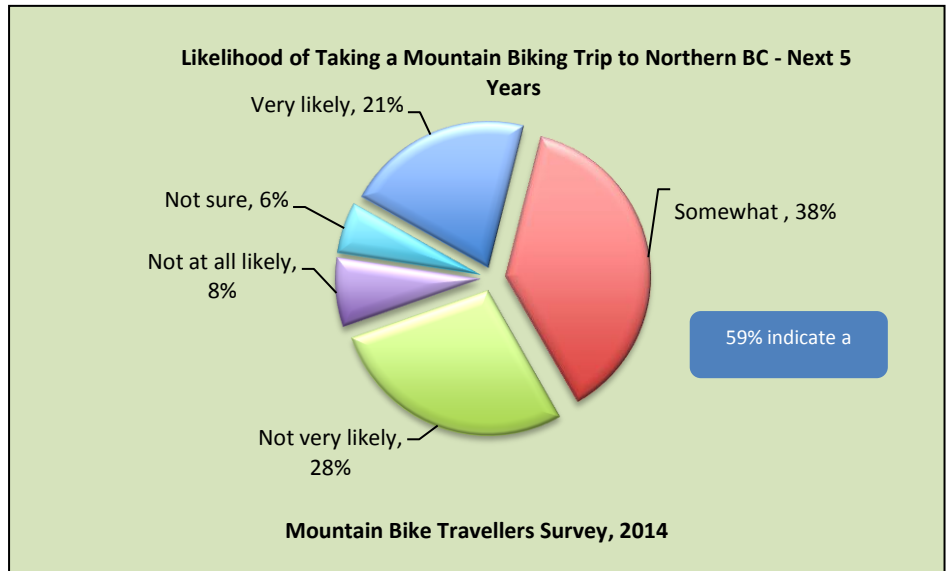
The focus group participants and the mountain bike travelers survey respondents were questioned on their impressions and perceptions of Northern BC as a riding Destination. There were a number of key perceptions that affected their considerations of travelling to the region. These included the following:

- **Lack of knowledge of the area/riding opportunities:** since they had not heard a great deal and they feel the area lacks a reputation as a riding destination, participants were worried trails were similar to those in southern BC and there were not enough trails to make a trip worthwhile.
- **Distance to travel:** most participants voiced a preference for driving for mountain biking trips due to the prohibitive costs and hassles of flying with a bike. They felt the distance to travel/length of travel time might not be warranted.
- **Short Riding season:** the perception is that riding season is short and overlaps with the best time to ride in southern BC.
- **Bugs!** – there was a strong perception that riding in Northern BC would be an uncomfortable experience due to a prevalence of insects
- **Lack of planning resources:** owing to their lack of knowledge of the area, participants were concerned about logistics and support services they would need to plan a trip.
- **Lack of an epic/anchor trail/destination:** participants need a compelling reason to make the trip and felt having a 'must ride' trail or area to visit would help.
- **Isolation:** divergent opinions on remoteness/isolation were expressed; some participants were intimidated by the remoteness, while others welcome it.

Intent of Mountain Bike Travellers to Visit Northern BC

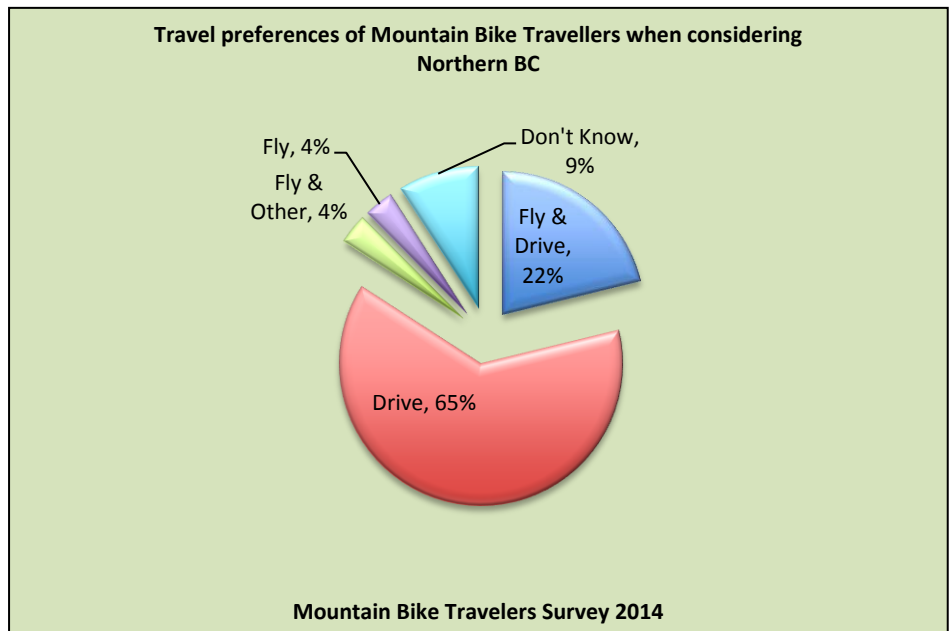
The Northern BC Mountain Bike Tourism Initiative endeavored to gain an understanding of the likelihood of mountain bike travellers to visit Northern BC and the elements that would be required to capitalize on this intent.

All of the respondents to the mountain bike travellers Survey were asked about their likelihood of visiting Northern BC on a mountain bike trip in the next five years. As shown in the Figure below, there does appear to be a high level of interest with 59% indicating some likelihood. While this is an encouraging result, it is recommended that emphasis be placed on those indicating they are 'very likely' to visit (21%).



Travel Preferences for Visiting Northern BC

For those respondents from the mountain bike travellers Survey who indicated there was a strong likelihood that they would consider traveling to Northern BC for a mountain bike trip, they were then asked to indicate their preferred means of travel. A strong majority indicated they would prefer to travel by car (65%)



Changing Perceptions of Northern BC

There is evidence to suggest that the perceptions and barriers identified above can be addressed and enhance the likelihood of people to visit the region. As part of the Focus Group, the project team provided greater amounts of information about the region and the riding opportunities and recorded the change in intent among the participants. As the participants learned more about the region, their interest and enthusiasm for visiting the area increased substantially.

Reaction to Information on Services & Images of Riding Experiences

The participants were shown a map of the region showing the driving distances between the communities, presence of bike shops, as well as the riding opportunities, all of which had a positive impact on their impressions and perceptions of the area. The participants were also shown some images of Northern BC riding, mainly of the Burns Lake area, which also prompted a generally positive response.

These responses indicate that with the right information and marketing, the negative perceptions and impressions of Northern BC can be overcome and the image of the region enhanced generally with the potential to increase visitation.

"The trails look more distinct from here, which surprises me. It is a good thing."

"I didn't realize they have machine-built trails. That means the trails have been planned and they are maintained."

"It looks like a lot of freeriding. I need to see variety."

"I'd always assumed Northern BC was big trees and big mosquitos. I now see there is more. I think promoting unique geographic features e.g. Seven Summits in Rossland help make an area more attractive."

Focus Group Participants

4.2 Potential Target Markets for Northern BC

The following section outlines and discussion the various potential target markets for the Northern BC. Insights are largely drawn from the mountain bike travellers Focus Group and the Mountain Bike Travellers Survey.

Target Demographics & Visitor Profiles

As outlined in the Rider and Visitor profiles in Part 3 of this report, the demographic profile for the mountain bike travellers most likely to visit Northern BC along with their travel motivations and preferences are as follows:

Demographic & Socio-economic profiles:

- Primarily between the ages of 25 and 55
- Mostly male, travelling in groups of 2 to 5 people – often friends, but increasingly with spouses and families. Women riders are a fast growing segment as well
- Typically have incomes of \$30,000 annually and higher and represent two distinct groups – fairly affluent young to middle age professionals and university/college students

Travel Motivations & Preferences

- They are seeking adventure and new riding experiences
- Are attracted to Northern BC by the wilderness. They are comfortable in the woods, but safety is still a strong concern
- Seeking broad diversity of trail types that are of high quality design, construction & well maintained
- All mountain/cross country signature ‘epic’ trails are the most sought after experiences followed by freeride and downhill
- Are most likely to take ‘self-guided’ rides but require good signage and way-finding and are willing to pay for high quality and accurate and reliable maps and trail information
- Will seek out local culture including local cafes, restaurants, pubs and entertainment – seeking authenticity (low preference given chain restaurants and franchises)
- Desire ancillary activities (other sporting activities, local events, etc) and entertainment opportunities
- Will seek out destinations that have local businesses and services that are open late and on weekends
- Are most likely to drive to the region and desire substantial riding opportunities compared against travel time

- Are seeking out circle travel routes and trip & riding itineraries (for example, lists of specific trail experiences rather than generic trail networks)
- Will consider other modes of travel with air travel being the most likely if there are convenient options for transportation and bike security (rental vehicles with bike racks, shuttles, etc)
- Are most likely to camp, preferably within close proximity to trails (short riding distance) but will also consider small lodges/hotels that are moderate to high quality and reasonably priced and offer amenities: bike security, washing stations, laundry, bike repair and transportation (shuttles)
- Some will travel to destinations for events and festivals but not as a primary motivation

Sources of Information

- Recommendations from friends, family and destination reputation are most critical elements in selecting destinations
- Mountain bike specific websites with good content – photos, video are also important
- Print media – magazines, etc can play a role, but are not as important as personal recommendations
- Information from tourism agencies is considered the least useful source of information

Target Markets by Geographic Region

Local & Regional Market

The first and most immediate opportunity for mountain bike tourism will be from within the local riding community of each of the communities across the region. Local riders are already travelling between communities generating economic activity as a result. Creating awareness of riding opportunities and attracting riders from across the region will be important for growing the sport locally and retaining visitors who might otherwise travel outside the region. Encouraging and supporting new riders and demographics to enter the sport will also be an important part of enhancing local market opportunities. This will involve supporting local sport development such as riding clubs, races and events that create awareness and support participation. This will also be a central element of ensuring the participating communities realize the social and community development benefits of trails and mountain bike recreation.

Inter-Regional & Provincial Market

Outside of the local and regional market, neighbouring regions throughout the province are potential markets for visitors to Northern British Columbia.

BC residents represent the largest travel segment in the region, providing approximately 61% of leisure travellers to Northern BC and 51% of total leisure travel spending within the region (source: Destination BC – Regional Tourism Profile, April 2013). Many of the travellers from BC (43%) are visiting friends and family members while in the region. Residents of the region can be excellent ambassadors for mountain biking if they are aware of the local riding opportunities and share these experiences with visiting friends and relatives. BC residents also ranked trail related activities, hiking and backpacking in particular, as the top activity while on a trip to North BC. This also suggests that Northern BC has a reputation for great trails and outdoor experiences, something that should be attractive to mountain bikers in the province.

As outlined in Part 3 of this report, a significant portion of the respondents to the Mountain Bike Travelers Survey indicated a strong likelihood of travelling to and visiting Northern BC for mountain bike recreation (17%). Also, the participants in the Mountain Bike Travellers Focus Group, though initially ambivalent towards visiting Northern BC, their interest increased as they learned more about the region, the communities, and in particular, the substantial growing riding opportunities within short driving distances of each other. These results indicate that Northern BC, and the Yellowhead Corridor in particular, could attract significant numbers of riders from other regions of the province with the appropriate marketing and branding.

Interprovincial Market

As noted in Part 3 of this report, mountain bike recreation and tourism is growing across Canada. The largest provincial market for mountain biking in BC is from Alberta. Rossland and Golden Mountain Bike Visitor Studies (Summer 2011) indicate that proximity to major highway corridors connecting Alberta to BC can have a huge impact on the number of mountain bike visitors from Alberta. In Golden, 67% of survey respondents were from Alberta whereas in Rossland, 15% of respondents were from Alberta. In both cases, the majority of Canadian mountain bike travellers from provinces other than British Columbia were from Alberta. Albertans also represents approximately 15% of website traffic to www.mountainbikingbc.ca, a source for mountain bike travel information on BC. (MBTA, 2011)

There are growing numbers of mountain bike riders and travellers throughout Alberta, with substantial numbers visiting Jasper National park for mountain biking which is also on the door step of the Yellowhead corridor.

Though there is no specific data available at this time, anecdotal evidence from the communities through the Robson Valley and the McBride to Kamloops corridor indicates that mountain bike travellers from the Edmonton and Northern Alberta area are traveling into BC to destinations such as Kamloops and beyond for mountain bike recreation. It may be possible to increase the capture rate of this market and attract visitors to the Yellowhead corridor through strategic marketing to raise awareness and interest in the mountain bike recreation and tourism opportunities in the area.

There is also a growing mountain bike recreation community in the Yukon Territory with both Whitehorse and Carcross developing into significant destinations. Though there is no specific data available at this time, anecdotal evidence from the communities in the Yellowhead Corridor indicates that mountain bike travelers from the Yukon are travelling south and visiting communities throughout the area for riding. Enhancing the awareness and interest in riding throughout the Yellowhead corridor among this growing market could generate greater visitation from this area.

US & International Market

There is little data available on current numbers of US travellers coming to British Columbia for mountain bike recreation. A 2006 Travel Activities and Motivations Study (TAMS) indicated that up to 135,000 U.S. visitors came to BC for the purpose of mountain bike recreation in the previous 2 years. The majority of these riders visit the Sea to Sky Corridor and Whistler. There are significant barriers to attract these visitors to Northern BC and the Yellowhead Corridor including a travel time, cost as well as the overall lack of awareness of the riding opportunities in the area. There may be some visitors who would venture to Northern BC with an enhanced awareness of riding opportunities, particularly from Washington and Alaska. Washington State is a growing mountain bike market with great interest in BC destinations. There is also a general interest among many Americans to travel to Alaska which suggested there could be an opportunity to attract those who are mountain bikers to stop and stay longer in Northern BC while on route. Alaskans also travel through the region when driving south via the Stewart-Cassiar Highway (Hwy 37), similarly they too could spend more time in the region if they become more aware of the mountain biking opportunities. In addition, visitors from both Washington and Alaska enter the region via the Alaska State Ferry service in Prince Rupert, with over 260,000 ferry passengers visiting the region in 2012 (Alaska State Ferry).

Similar to the US Market, there are a substantial number of international visitors who visit BC each year for mountain bike recreation with the large majority of them visiting the Sea to Sky Corridor and Whistler, in particular. The barriers and challenges for this market of potential visitors to Northern BC are likely different from US visitors stemming more from issues around transportation as well as an overall lack of familiarity and awareness of the riding opportunities in the region. Germany has the greatest interest in Northern BC among international visitors albeit only 2% share of visits to the region (source: Destination BC). German visitors are drawn to BC primarily for its beautiful natural scenery (source: Global Tourism Watch 2012 Germany Summary Report – CTC). Germany is also a thriving mountain bike nation with some of Europe’s top mountain bike manufacturers and athletes and leads all European countries in terms of bicycle sales (European Bicycle Market & Industry Profile - 2013 Edition).

Opportunities with European adventure travel or cycling media may be one way to develop the allure of adventure and new riding opportunities that may be highly attractive to this market. There have been stories of local representatives from mountain bike clubs in the Yellowhead Corridor, such as Burns Lake, meeting riders from European countries who professed to travelling to the region specifically for mountain biking after having read about the riding opportunities in a magazine.

Though the US and International markets will not likely represent a significant share of the visitors for Northern BC in the short to medium term, it is possible to increase the capture of these markets by increasing the awareness of the riding opportunities and addressing perceptions about travel time, the availability of amenities, and providing convenient travel and transportation solutions.

PART FIVE

REGIONAL COLLABORATION

The Northern BC Mountain Bike Tourism Strategy explores and assesses the viability for participating communities to develop and implement a collaborative model to promote the region as a destination for mountain bike tourism. There are a number of regions, both in BC and around the world, that are currently embracing a regional approach to mountain bike tourism marketing. This report provides an overview of the most relevant examples and lessons learned for Northern BC.

The key questions this project addresses are:

- **Does Collaboration Work?** Are there regions and communities that have developed collaborative strategies that have resulted in higher visitation rates and enhanced economic activity?
- **Best Practices & Lessons Learned?** What strategies and practices are other regions and destinations utilizing and have they been successful? What are the best practices and lessons learned?
- **Does It Make Economic Sense?** What is the likelihood that the participating communities will experience a growth in the number of visitors and economic activity to justify the effort and expense of collaboration?
- **What Does Collaboration Look Like?** What are the key elements that should be included in a regional collaborative model for Northern BC?

Understanding how communities and regions around the world are establishing themselves as successful mountain bike tourism destinations allows the development of practical and effective strategies for communities participating in the Northern BC Mountain Bike Tourism Strategy.

5.1 Summary of Findings

The case study review indicates that regional collaboration along with strong branding and marketing, coupled with the development of high quality trails and infrastructure, has a high likelihood of resulting in increased rates of visitation and economic activity. Figure 1 below highlights the strategies and results drawn from the case studies.

The case study review strongly suggests that participating in regional collaborative strategies or incorporating regional branding strategies can lead to higher rates of visitation and enhanced economic benefits. Each of the communities has been able to show that they have experienced the following impacts:

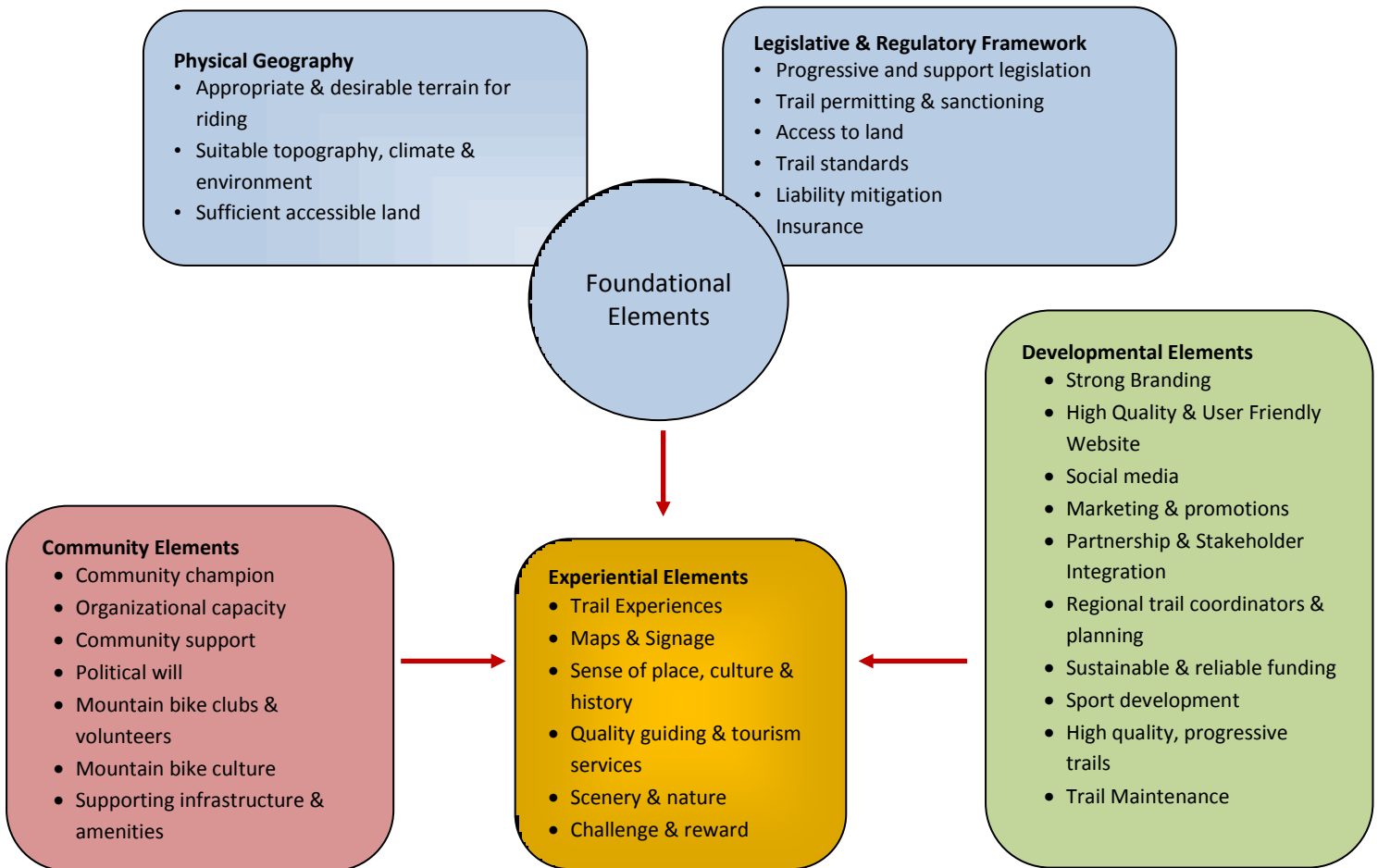
- Substantial growth in the numbers of riders counted on trails
- More visitors – each of the regions/communities experienced increases in the number of visitors to their area
- More economic activity – each of the regions experienced increases in the revenues of local businesses with a particular increase in accommodations and service sector operations
- More employment related to mountain biking and trails
- Increased total value of the mountain bike sector
- Greater participation in regional mountain bike events

British Columbia is one of a few highly recognized world-class destinations for trails and mountain bike recreation with thousands of kilometers of trails and riding experiences that attract riders from around the world. Over the past few decades the sport has grown from an exclusive and high-risk endeavor, practiced by a handful of extreme riders on illegal trails, to a recreational pastime enjoyed by people of all ages and fitness abilities. This growth has been supported by a progressive regulatory framework of legislation and policies that are acknowledged as a standard for recreational development around the world. Trails and mountain bike recreation have also developed throughout the province as communities, government agencies and volunteer and advocacy groups recognize their social, economic and environmental values and have worked tirelessly to ensure a lasting legacy of world class trails and riding experiences.

Each case study demonstrates some combination of the following four essential elements:

- **Foundational elements** – legislation, regulatory framework, physical geography, access to land
- **Community elements** – champions, capacity, trail clubs, community support, infrastructure & supporting amenities
- **Experiential elements** – high quality trails, maps & signage, sense of place and community culture
- **Developmental elements** – sport development, marketing strategies, branding, funding, partnerships

Essential Elements of Regional Collaboration & Tourism Development



These elements are described in greater detail below:

Foundational Elements

Legislation & Regulatory Frameworks – each of the regions is supported by progressive legislation and regulatory frameworks that guide and support the development of trail systems. These include the provision of access to land, trail standards as well as programs for liability mitigation and insurance coverage.

Physical Geography – the terrain, topography, climate and environment are suitable for trail building and there is sufficient land available to develop a substantial volume of trails. The conditions allow for the development of a variety of trails that provide for positive riding experiences.

Community Elements

Community Champions – the importance of having a community champion for the development of mountain bike recreation and tourism cannot be overstated. Each of the communities and regions reviewed in the case studies, as well as other successful mountain bike tourism destinations and regions, had community champions: individuals, groups (mountain bike clubs or other user groups) and/or government agencies that were committed to a shared vision of community development and to making their vision into reality. These groups and individuals were critical for ensuring the project moved forward and maintained its momentum in the community.

Organizational Capacity – Each of the communities and regions reviewed had stakeholders and key groups, individuals, and agencies possessed the capacity and resources (financial and otherwise) to support their efforts and realize their visions for development. The communities had active and robust mountain bike and/or trail user groups that provide advocacy, volunteer labour with the experience, skills and expertise necessary to move the project forward.

Community Support & Political Will – for each of the case studies, the communities and/or regions developed and maintained strong community support and political will that allowed trails and mountain bike experiences to develop and flourish. A key element for successful regional collaboration includes gaining and maintaining the support of the local business community. These regions also built and enjoyed strong support from their business communities.

Mountain Bike Culture – each of the regions or communities had a strong or growing culture around trails and mountain bike recreation. This included:

- Strong membership in clubs
- Participation in trail riding and trail building and maintenance
- Growing participation in events
- **Supporting Infrastructure & Amenities** – each of the communities had the necessary supporting infrastructure and amenities such as bathrooms, bike cleaning stations, campgrounds, accommodations, bike shops, restaurants and entertainment services to support tourism.
- **Trails & Recreation Clubs** – each of the regions had multiple trail and user groups, particularly mountain bike clubs, who advocated for and participated in the planning development and maintenance of trails

Experiential Elements

Trail Experiences – each of the regions had or developed a substantial number of high quality trails that catered to all riding levels and a diversity of riding types.

Maps & Signage – each of the case studies placed a high premium and considerable efforts to ensure they had accurate, up to date and easy to read maps as well as signage and way finding options for their trail networks.

Sense of Place, Culture & History – each of the regions and communities provided a strong sense of place, culture and history as part of the riding experience. The trail systems were strongly linked to local culture and history through story-telling and branding. This is particularly true for the 7Stanes where trails are marked by the Scottish Stanes that impart stories, local legends and myths about the area and the trail experiences. Each of the regions provided strong linkages between the trail systems and the community so that the riding experience to the area were strongly linked in the visitors' imagination and impression of the area.

Quality Guiding & Tourism Services – within each of the regions, there were a variety of private guiding and tourism services that catered to the mountain bike tourism market

Scenery & Nature – each of the regions and communities had strong natural values including scenic and attractive geography as well as natural areas and forests as part of the riding experiences

Challenge & Rewards – the trails and riding opportunities provided a challenge for riders with a strong sense reward and accomplishment

Developmental Elements

Supporting Infrastructure & Amenities – each of the communities had the necessary supporting infrastructure and amenities such as bathrooms, bike cleaning stations, campgrounds, accommodations, bike shops, restaurants and entertainment services to support tourism.

Trails & Recreation Clubs – each of the regions had multiple trail and user groups, particularly mountain bike clubs, who advocated for and participated in the planning development and maintenance of trails

Strong Branding – each of the regions and communities developed strong and easily recognizable brands that captured and reflected their unique heritage, history, culture or geography.

High Quality & User Friendly Websites – locations had high quality websites that were user friendly and provided information that was easy to navigate and access. Elements included:

- Trip planning – focus on ease of travel between differing locations within the region
- Maps & trail descriptions, status updates and riding conditions
- Trail information – including types of riding experiences and difficulty
- Events & recommended itineraries for each participating community in a given region
- Information on trail and riding opportunities specifically targeting women and families
- Information on local businesses and complementary services
- Videos highlighting signature experiences and stories unique to the location
- Mobile phone accessible or smart phone apps
- High quality photography

Marketing & Promotions – each of the communities employed a variety of marketing and promotional strategies including:

- Contests and promotional trips
- Billboards & ads at strategic locations targeted to specific demographic groups
- Active and consistent use of social media (Facebook, Twitter, etc.)
- Participation in tradeshow
- Advertising on key websites related to mountain biking (such as Pinkbike, Mountain Bike BC)

Partnerships & Stakeholder Integration – in each of the case studies, the communities and regions developed partnerships and integrated a broad diversity of user groups and stakeholders into the planning and development process. Mutually beneficial partnerships and stakeholder integration builds trust and community support and buy-in that is necessary to ensure the long-term sustainability of trails and tourism development.

Regional Trail Coordinators & Planning – each of the regions either had regional coordinators who facilitated planning and development of trails or participated in some degree of regional planning that was then implemented at the local level.

Sustainable & Reliable Funding – each of the regions have developed and implemented a number of different strategies for ensuring sustainable and reliable funding for trail development and maintenance. These strategies include:

- Business taxes – taxes levied on accommodation or business revenues
- Parcel or requisition taxes – taxes applied against property throughout the region either as a flat fee or calculated based on the value of properties
- Membership fees collected through local clubs
- Fees for businesses to be listed on mountain bike websites
- Trail passes
- Grants and donations

Sport Development – in each of the case studies, the communities actively supported the growth of mountain bike recreation within their respective regions, and encouraged new riders to get engaged and participate in the sport. There were programs specifically targeting women and youth to get involved, thereby growing the sport and the market for trails within the region. The communities coordinated and hosted a variety of mountain bike festivals and events.

High Quality, Progressive Trails – trail types that offered diversity and exciting experiences and could accommodate all levels of riders with a focus on beginners and intermediate. Locations also work continuously to enhance and present new challenges to keep visitors engaged and wanting to return.

Trail Building & Maintenance – each of the regions employ a variety of strategies that focused on developing the capacity of local trail builders (both volunteers & professionals) as well as ensuring the long-term maintenance of trails

5.2 Regional Case Studies

This study focuses on these three regions:

- Cariboo Chilcotin
- 7 Stanes - Scotland
- Sea to Sky Corridor - Squamish

Each of these regions are well established high profile mountain bike recreation and tourism destinations. Additionally, each has varying degree of regional branding or collaborative models for development and marketing. These locations are useful in that they have undertaken studies to assess their visitation rates as well as the economic impacts of their mountain bike recreation developments and marketing efforts. The Cariboo Chilcotin and the 7Stanes have developed regional collaborative models that involve several communities partnering to promote their respective regions for mountain bike recreation and tourism. Squamish was chosen as a case study due to its location within the Sea to Sky Corridor, which is a well-known regional destination for mountain biking and tourism. In addition, Squamish was featured in a 2006 regional economic impact assessment of mountain bike tourism in the Sea to Sky Corridor. In January 2014, the Squamish Off-Road Cycling Association (SORCA) completed an updated economic impact assessment that provides an understanding of how mountain bike recreation and tourism have grown and changed in the area since 2006. Each of these case studies provide an understanding of how the potential for strong branding, regional collaboration, careful development and management of trails, and strategic marketing can contribute to the growth of mountain bike recreation and tourism.

Cariboo Chilcotin

The Cariboo Mountain Bike Consortium was formed as a strategic alliance between the communities of Williams Lake, 100 Mile House, Quesnel and Wells to promote the mountain bike sector and enhance its contribution to the economic diversification of the region. Since 2010, the Consortium has created a brand (Ride the Cariboo, the Shangri-la of mountain biking), developed a website that highlights the trail opportunities and services available in each community, and undertaken various marketing and promotional activities to promote the region and a destination for mountain biking.

The Consortium undertook a baseline study in 2010 in order to establish a foundation for monitoring and evaluating the economic impacts of their strategic alliance and the contribution of mountain biking to the region. In 2012, they completed an economic impact study to determine the results.

Strategies	Results & Outcomes
<p>Structure & Organization</p> <ul style="list-style-type: none"> • Collaboration between four communities within driving distance of each other • Providing a broad range of trail networks and riding experiences • Ride the Cariboo Consortium - a regional organization that provides coordination, marketing & promotions <p>Branding & Marketing</p> <ul style="list-style-type: none"> • Strong Brand Development – Ride the Cariboo, the Shangri-la of mountain biking • Website Development: ridethecariboo.ca <ul style="list-style-type: none"> ○ Provides community profiles ○ Maps and way-finding ○ Events, recommended itineraries and tour packages ○ Information on businesses & services ○ Videos featuring signature trail (snakes & ladders) • Promotion of trails & experiences through Mountain Bike BC • Pinkbike website strategy – ads featuring events & the Cariboo riding experience • Strategic billboards on the Sea to Sky Highway • Promotional trips & contests <p>Trail & Sport Development</p> <ul style="list-style-type: none"> • Build & maintain high quality trails • Foster the growth of the sport within the region • Encourage new riders & youth (Sprockids program) • Workshops for women • Providing free shuttle services for visitors (Williams Lake) • Considering developing a parcel or 	<ul style="list-style-type: none"> • 11.5% increase in economic activity • 30% increase in trail usage • 21% increase in mountain bike visitor spending • 20% in jobs associated with mountain bike activity • Website is receiving as much as 17,000 views during the season • 8% increase in activity at regional mountain bike businesses (\$1.61 million annually) • Total value of the mountain bike sector in the region estimated to be over \$2.2 million annually • 10% increase in out of region ridership • 32% to 40% increase in participation in regional events • The number of out-of-region riders participating in the events has grown by as much as 85%

business tax to support trail development, maintenance and marketing	
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Strategies and Activities

Strong Brand – Ride the Cariboo, the Shangri-la of mountain biking

Website (ridethecariboo) – Launched in 2011 the number of visits peaked at 2,547 with 17,000 views during the riding season. Website provides community profiles and information on trail networks, services and businesses, accommodations, and events and tour packages.

Pinkbike Website Strategy – Since then the Consortium has partnered with the City of Williams Lake, NDI and the Community Tourism Opportunities program of the Ministry of Jobs Tourism and Innovation to invest in a Pinkbike.com advertising strategy. Pinkbike.com is the largest mountain bike website in the world and receives over 1.5 million visits per month. A series of ads that focused on regional events and the general Cariboo riding experience was initiated April of 2012.

Strategic Billboards – Strategic billboards were placed on the Sea-to-Sky corridor to drive traffic to the website. Activity on the website increased 207% to over 7800 site visits at the midpoint in the 2012 season. Page views rose to 34,145 with up to 50% of these being new visitors.

Promotional trips and contests – The Ride the Cariboo Consortium has undertaken a series of contests for people to win extended mountain bike tours to the Cariboo Chilcotin through Pinkbike and other media outlets that have raised awareness and interest in mountain biking in the area and has further driven people to visit the Ride the Cariboo website.

Trail Maintenance – the consortium has several trail crews that provide maintenance including a paid trail crew (the pro crew), a volunteer crew consisting of club members, and a group of youth interns.

New Trail Infrastructure – Strong focus on developing and marketing new trails and signature trails that are unique to the region – specific riding experiences that can be profiled to motivate travel to the region. A good example of this would be the Snakes & Ladders trail. The consortium has developed a short video highlighting this trail which has been featured on the Mountain Bike BC website and others.

Free Shuttle Services – The City of Williams Lake, in partnership with the Williams Lake Cycling Club and the Cariboo Mountain Bike Consortium began operating a free shuttle service for mountain bikers to visit various trail networks throughout the Williams Lake area. The shuttle provides

transportation to different trail networks on weekends throughout the summer season. 2014 was the first year of operations and initial reports are that the service was well used by a broad diversity of people with substantial numbers of visitors utilizing the service.

Sustainable Funding – The consortium engaged with businesses directly involved in providing services to mountain bike sector for advertising revenue. This generated approximately \$5,000 over a period of several years and is not considered likely to be a substantial source of revenue. Looking at developing a dedicated funding stream that is to the consortium generated off a proportion of the CRD tax base, which would be used for mountain bike marketing and trail infrastructure. A dedicated funding allotment of \$120,000 to \$140,000 would be required to have a regional coordinator. This level of funding would allow ongoing leveraging of infrastructure and marketing funds.

7Stanes – Scotland

What are the 7Stanes?

The development of 400km of mountain biking trails started in 2001 and they continue to be maintained and refreshed by the Forestry Commission Scotland. The trail network is designed for all levels of expertise from green trails to black trails catering to both cross country and downhill riders.

The 7Stanes gets its name from the Scots word “stane” for stone as at each of the 7stanes locations you will find a stone sculpture reflecting a local myth or legend. The Stanes can be found out on the trails in the forest, in prominent locations near cycling and walking paths.

Now considered one of the premier mountain biking destinations in the world and a model for regional mountain bike tourism the 7stanes project was initiated in 2001 by the Forestry Commission to stimulate the economy of the South of Scotland as a top mountain biking tourism destination and bolster tourism.

Strategies	Results & Outcomes
Structure & Organization <ul style="list-style-type: none"> • Collaboration between seven different communities • Trails are developed and maintained by the Forestry Commission Scotland • Marketing, branding and administration is undertaken by the 7Stanes Mountain Bike Community Interest Company, which is a non-profit organization overseen by a board of directors with public, private and elected representatives from across the region Branding & Marketing <ul style="list-style-type: none"> • Strong branding – 7Stanes captures culture and heritage in an attractive and memorable manner • Continuously improving signage and maps • Well developed and accessible website: <ul style="list-style-type: none"> ○ Provides trip planning tips ○ Itineraries for all levels of riders including families with children ○ Provides information on local businesses and services ○ High quality videos highlighting signature trails ○ High quality photography – made accessible to other promotional outlets and media ○ Mobile phone friendly along with a separate smart phone application ○ Highlights the ease of travelling between sites (car or mass transit) • Cross promotions with local businesses • Aggressive use of social media (Face book, Twitter, etc) – hired consultants • Participation in trade shows • Contests & promotional trips 	Visitor Volumes & Awareness <ul style="list-style-type: none"> • The number of visitors has increased from 172,000 in 2004 to 394,000 in 2007 • More people are visiting the trails from outside Scotland when compared to 2004 suggesting a broadening geographic appeal • Visitor awareness of the trails has increased: 96% knew of trails compared to 75% in 2004 • Increasing number of families: up to 15% of visitors from 10% in 2004 • Increase in visitors staying overnight: 1/3 compared to 1/4 in 2004 • Shift in the balance of types of accommodations that are being used: <ul style="list-style-type: none"> ○ Greater numbers staying in hotels and camping with fewer in hostels or staying with friends • More visitors visiting multiple sites throughout the area • Greatest number of visitors found out about the trails through word of mouth • 75% of visitors indicated they considered the trails to be ‘very good’ – highlighting the need to ensure high quality trails • 77% of visitors indicated they were very likely to visit the trails again within the next three years Economic Activity <ul style="list-style-type: none"> • Gross expenditure resulting from the 7Stanes was approximately £9.18m (\$16.4 million CAD) at the regional level and £11.08m (\$19.8 million CAD) at the national level. • It is estimated that through the project 211 jobs have been created at the regional level and 236 jobs at

<ul style="list-style-type: none"> • Brand displays – on other websites • Pay click advertising on Google to drive traffic to website <p>Trails & Sport Development</p> <ul style="list-style-type: none"> • Developed progressive trails to meet demand for broader diversity and growing beginners and intermediate riders • Foster growth of mountain biking across the region to develop the local market • Continuously working on trails to keep visitors challenged and wanting to return • 7Stanes Demo team that participates in mountain bike events to build awareness & interest in trails & mountain biking 	<p>the national level</p> <ul style="list-style-type: none"> • More businesses reported that they felt the trails were having a positive impact – more customers and greater revenues <ul style="list-style-type: none"> ○ 67% reported sales/occupancy increasing as a result of trails • More are using 7Stanes branding as part of their promotions • More businesses offering services: <ul style="list-style-type: none"> ○ Showers ○ Laundry ○ Storage ○ Repairs and maintenance ○ Transportation (Shuttles)
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Strategies & Activities

Developed Progressive Trails – The 7Stanes realized that there was a demand and a need to develop and provide a progression of trail types and difficulty that would appeal to a larger and broader diversity of riders. This would grow the sport within the region and accomplish their goals for enhancing community livability as well as attracting new and beginner level riders to the region. The 7Stanes also seeks to continuously improve the difficulty and types of trails to keep visitors challenged and wanting to return.

Strong branding – the 7Stanes have tapped in to a highly unique and very visible cultural feature of the ‘stances’ to differentiate the trail networks in Scotland from other region. The Stane is an instantly recognizable feature that integrates history and culture in an attractive and memorable manner.

Comprehensive and well developed signage and maps (way-finding) – the 7Stanes have endeavored to provide high quality and comprehensive signage and maps that allow riders and visitors to find their way around and experience the trails. Though recently completed surveys have indicated there is a need to improve signage, the 7Stanes is continuously updating and improving their assets and they have experience substantial positive feedback as a result.

Easy planning – the 7Stanes provides information about the trail networks as well trip planning and itineraries available through a variety of means

including the website, trade shows and through local business and services. Potential visitors are able to get the information they need to make a travel decision in a timely and effective manner.

Cross Promotion with Local Businesses – the 7Stanes made it a key objective to partner and collaborate with local businesses to cross promote the trail networks. This included providing information about services provided as a means for promoting local business and likewise encouraged those businesses to promote the trails. Incentives for local businesses include providing free listings on the website and other promotional materials in exchange for inclusion of the trails and mountain bike experiences in promotional materials of participating businesses. The goal was to raise awareness and to attract riders motivated to travel for the trail networks, but making travel or purchase decisions based on the availability of appropriate services.

Foster the Growth of the Sport & Participation within the Local Communities – the 7Stanes has actively promoted and fostered families, youth and new riders to enter the sport in communities across the region and throughout Scotland with the intention of both fostering healthy active living, but also to grow the local and regional market opportunities. They have worked with local schools and community groups. They offer specific programs and information about trails and activities that are specifically designed for families and children (i.e 7Steps – itineraries and trail suggestions for families with children). They have also organized courses and itineraries specifically targeting women.

Marketing & Promotions – the 7Stanes has developed and employed a robust marketing and promotions strategy to promote mountain bike recreation across the region and to position the 7Stanes as a world class mountain bike tourism destination. Their strategies have included the following:

- ***Aggressive use of social media*** – the 7Stanes retained a professional consulting team to develop and implement a social media strategy to ensure a strong presence online including Facebook, Twitter and other social media platforms.
- ***7Stanes demo team*** – a team of pro riders who participate in mountain bike events further enhancing the brand and building awareness

Website development

- Videos to showcase trails
- Arrange the site to drive people to businesses
- Provide itineraries and tour packages
- A separate mobile site & app

- Brand displays – banners, etc on sites of interest to mountain bikers
- Pay click advertising on Google to drive traffic to particular parts of the website such as accommodations, services events
- Social media – Facebook etc
- Trade shows
- Contests and promotional trips
- High quality photography and content
- Highlighted ease of driving distance.
- Email campaigns targeting people through databases through lonely planet and outdoor magic
- Corporate sponsorships

Sea to Sky – Squamish

The Sea to Sky Corridor, which includes Squamish, Whistler and Pemberton, has developed into a significant regional brand for tourism. The mountain bike clubs and communities within the Sea to Sky Corridor do not participate in any kind of collaborative activities to promote the corridor for mountain biking as a single unit. There currently one website: squamishmountainbike.com that promotes trails and mountain biking throughout the Sea to Sky Corridor though apparently this site will be shutting down in the near future. Each of the communities have their own mountain bike clubs, websites, and largely operate separately from each other to develop their own brands, organize and coordinate trail developments and mountain bike events.

There are, however, a number of regional activities and initiatives ongoing to support trail development and mountain bike recreation and tourism throughout the region. The Squamish – Lillooet Regional District which includes Squamish, Whistler and Pemberton has a developed trails master plans for the region as well as providing a trails coordinator who oversees the development of trails throughout the area.

The ongoing development of the Sea to Sky Trail, which will be a non-technical, multi-user mountain bike trail connecting the communities of Squamish, Whistler, Pemberton, and D'Arcy will be a regional trail development that will potentially contribute to the awareness of the Sea to Sky Corridor as a mountain bike destination. There are a number of mountain bike related business and events such as the Sea to Sky Challenges, which involves a 2 day guided ride on the Sea to Sky trail that promote mountain biking in the region as use the Sea to Sky Corridor as the promotional brand for their services.

In 2006, the MBTA undertook an economic development impact assessment using the Sea to Sky Corridor as the study area. This study provides a

baseline for understanding the regional impact of mountain bike tourism in the area.

Strategies	Results & Outcomes
<p>Structure & Organization</p> <ul style="list-style-type: none"> No formal Sea to Sky Mountain bike collaboration or organization Each community has their own club and website Regional district has a trails coordinator and provides overall planning and support (focused on Sea to Sky Trail) <p>Branding & Marketing</p> <ul style="list-style-type: none"> Strong Brand and awareness of the region as a destination Squamishmountainbike.com provides information on trails and events throughout the Sea to Sky Corridor Multiple mtn bike business promote Sea to Sky related events and tours Videos that promote signature trails (i.e Full Nelson in Squamish) <p>Trail & Sport Development</p> <ul style="list-style-type: none"> Sea to Sky trail is underdevelopment linking all three communities Events: there are a multiple high profile mountain bike events that take place throughout the region Requisition tax based on property values that provides funds for Sea to Sky Trail and other trail projects (raises up to \$150,000 annually) SORCA very active in trail development & maintenance 	<ul style="list-style-type: none"> Compared to the 2006 economic impact study, traffic has quadrupled from an estimated 591 riders counted per week to 2600 Conservative estimates project that, over a season between 25,000 and 37,500 riders visit Squamish in a season Visitor surveys indicated that 75% of riders are non-residents Mountain bike tourism is estimated to inject \$8 million into the Squamish economy annually Local businesses and new housing developments are promoting trails and race events as a means for attracting consumers to their businesses

Strategies & Activities

Branding – each of the communities within the Sea to Sky, particularly Whistler and Squamish, have very strong brands and strong market awareness as destinations for mountain biking. The Whistler Bike Park is known around the world as one of the premier mountain bike parks. Although, the communities haven't developed a particular regional brand around mountain biking in the Sea to Sky Corridor, the region is well known as a geographic unit and Pemberton likely benefits from this awareness.

Events – there are a number of well-known and highly reputable mountain bike events that occur each year in the corridor, most notably Crankworks, which is one of the biggest mountain bike festivals in the world, attracting thousands of visitors and generating significant volumes of economic activity. The Test of Metal series, which occurs in Squamish each year, is also a highly successful and popular race series that has significantly increased the awareness and interest in Squamish as mountain bike destination. The BC Bike Race, which is one of the most reputable and popular race events in the province that attracts riders from around the world features both Squamish and Whistler and promotes mountain biking within the Sea to Sky Corridor. In Pemberton, the Nimby 50 Mountain Bike Race is also becoming a significant annual attraction.

Website – each of the communities have websites hosted by the local bike clubs or tourism agencies that are easy to access with clear information, trail descriptions and maps

Videos – there are substantial volume of videos available that showcase and highlight trails throughout each of the communities, some prepared by professionals and highlighted by tourism agencies and local bike clubs, as well as local amateurs and mountain bike enthusiasts. The videos provide an excellent profile of the broad diversity of riding opportunities and experiences that are available in each community

Parcel tax – SLRD provides up to \$150,000 annually to a service called Sea to Sky Trails, which funds the management of the Sea to Sky Trails and can also be used for other trails throughout the area. The funding is raised through a parcel tax that is levied against all properties within the District based on property values.

Development & promotion of signature trails – Squamish has pursued the development of the Half Nelson and Full Nelson trails as a key signature trail as a high quality flow style riding experience. According to a recent survey, 85% of the riders on the Full Nelson are non-residents highlighting the value of investing in signature trails.

5.3

Regional Collaboration in Northern BC

There is a strong interest across the region for collaboration. Throughout the community engagement activities, each of the participating communities indicated they are eager to develop partnerships and implement strategies that will encourage the development of mountain bike recreation and promote the region as a destination for tourism. 85% of the communities surveyed indicated that they were interested in collaboration. The majority of the communities indicated they had a strong belief that there was a high level of capacity throughout the communities to participate in collaborative efforts.

The strongest priorities for collaboration were within the regional districts or between communities that were within close proximity to each other.

Community Interest & Indicated Levels of Capacity

There is a strong interest across the region for collaboration. Each of the communities that participated in the engagement activities indicated they are eager to develop partnerships and implement strategies that will encourage the development of mountain bike recreation and promote the region as a destination for tourism. The majority of the communities indicated a high level of confidence that there was sufficient capacity throughout the communities to participate in collaborative efforts.

The strongest priorities for collaboration were within the regional districts or between communities that were within close proximity to each other.

The following table provides a breakdown of how each of the communities indicated their interest and capacity for collaboration:

Table2: Community Interest & Indicated Levels of Capacity

Community	Interest in Collaboration	Capacity for Collaboration	Notes
Valemount	Yes	High	Community strongly believes more work on trail development is required before extensive collaboration
McBride	Yes	Premature	Very few trails have been developed, community needs to undergo extensive trail development
Prince George	Yes	Very High	Trail club and tourism agency have strong interest in collaboration. There is a substantial & growing network of marketable trails
Mackenzie	Yes	Premature	Community has a strong interest but there are still many development issues that need to be addressed
Fort St. James	Yes	Somewhat premature	Community has growing trail network but there are key development issues that need to be addressed
Vanderhoof	Yes	High	Community is moving forward with trail developments
Burns Lake	Yes	Very High	Community trails are extremely well developed. Clear vision around tourism needs to be developed between the club and the village
Houston	Yes	Premature	Community is just beginning to develop trails
Telkwa	Yes	Neutral	Community is prepared to work with Smithers to develop trails and riding opportunities
Smithers	Yes	Very High	Some concerns over maintenance and impacts to trails and overwhelming volunteers
Terrace	Yes	Very High	Community has a growing network of trails, increasing capacity for trail development and maintenance and is eager to develop programs to encourage greater participation by residents in the sport.

Community Priorities for Collaboration

Four of the communities including Prince George, Burns Lake, Smithers and Terrace were all identified as priority communities by the majority of the participating communities. These communities could function as lead and anchors for any collaborative strategies or initiatives that are implemented as a result of the planning initiative. Prince George was the only community that indicated a high level of priority for collaborating with communities from across the region.

Table 3: Community priorities for regional collaboration

			Fraser Fort George				Bulkley-Nechako								Kitimat -Stikine
	Entire Study Area	Regional district	Valemount	McBride	Prince George	Mackenzie	Fort St. James	Vanderhoof	Fraser Lake	Burns Lake	Houston	Telkwa	Smithers		Terrace
Valemount															
McBride															
Prince George															
Fort St. James															
Vanderhoof															
Burns Lake															
Houston															
Telkwa															
Smithers															
Terrace															

Highest Priority	
High Priority	
Low Priority	
Not a Priority	

These results indicate that although there is a strong interest in collaboration across the region, the highest and strongest preferences are for collaboration and partnership amongst communities that are within close proximity.

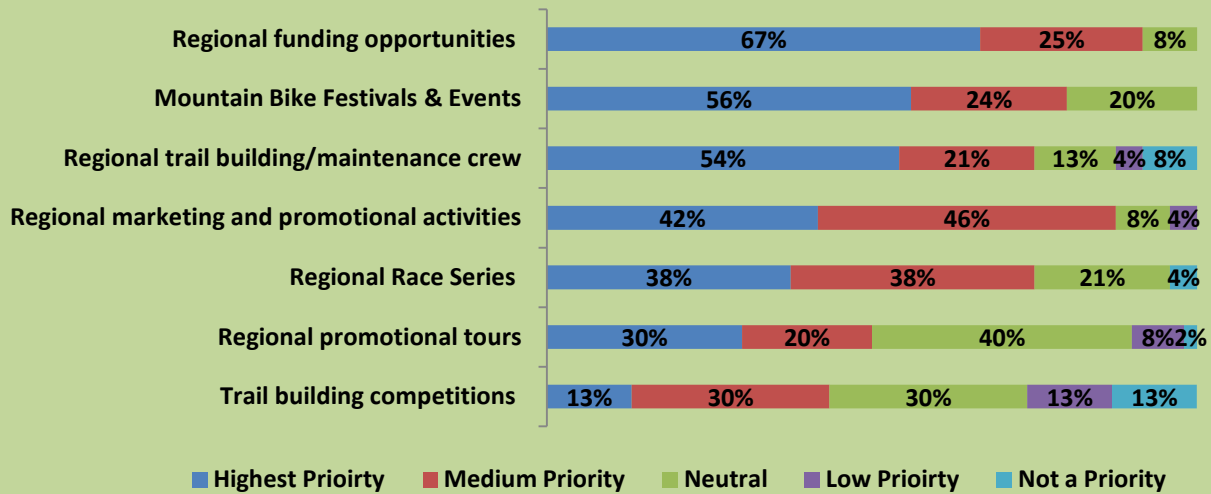
Preferred Options & Actions for Collaboration

A number of options and strategies for regional collaboration were identified and assessed for the participating communities throughout the Yellowhead Corridor. These included the following:

- **Planning and scheduling mountain bike events** – this will involve developing and promoting a schedule of events throughout the region to raise awareness
- **Regional branding, marketing and promotional activities** – this will involve developing a regional brand and implementing a regional collaborative marketing strategy
- **Development of a regional trail building/maintenance crew** – this would involve exploring the opportunity for communities to share the costs for a crew that would work on and maintain trails throughout the region
- **Coordinating and hosting regional promotional tours** – this would involve collaborating with the Mountain Bike Tourism association to host promotional tours to raise awareness and interest in the region
- **Pursuing regional funding opportunities** – many of the communities in the region expressed an interest in pursuing regional trail developments that could potentially attract greater funding opportunities
- **Regional Race Series (i.e. northern BC Bike Race or BC Enduro series)**
- **Trail Building Competitions** – between the communities in the Yellowhead Corridor to raise the profile of trail development

As shown in Figure 11, a significant number of respondents indicated the pursuit of regional funding opportunities, cooperation in planning events, the development of regional trail building and maintenance crew and regional marketing activities as their top priorities. This was followed by the development of a regional race series. The items that garnered lower priority ratings included hosting promotional tours and trail building competitions between the communities.

Priority Activities for Collaboration



Regional Engagement Follow up Questionnaire

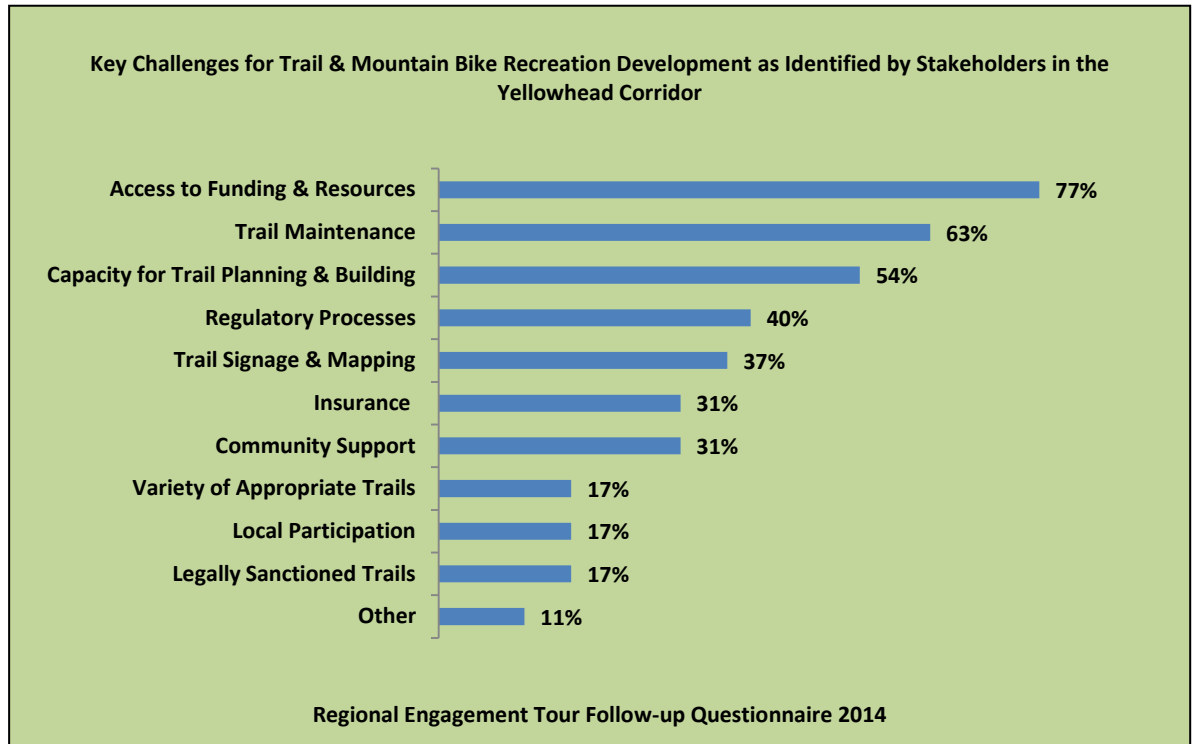
PART SIX**DEVELOPING MOUNTAIN BIKE RECREATION & TOURSIM IN NORTHERN BC**

The following section outlines the state of mountain bike recreation and tourism development in project area.

6.1**Key Challenges for Development**

The participating communities identified the key challenges they face in developing trails and recreation opportunities and to position themselves as mountain bike tourism destinations. The key challenges that were identified included the following:

- Access to funding and resources (77%),
- Trail maintenance (64%),
- Capacity for trail planning and building (54%),
- Regulatory processes (40%),
- Trail signage and mapping (37%),
- Insurance (31%),
- Soliciting and maintaining community support (31%),
- Developing a variety of appropriate trails (17%),
- Encouraging local participation (17%),
- Attaining legal sanctions for trails (17%); and,
- 'Other' 11%.



Among those that indicated 'other' the top concerns were challenges for developing progress trail systems due to steep terrain and challenging geography, communications between stakeholder groups and government and volunteer burn out.

Clear Vision & Plans

For a number of the participating communities, there was some confusion and a lack of clarity around the vision for mountain bike recreation and tourism. Though a local club may have a vision for mountain biking, it was not always known or clearly understood by the broader community. Some of the communities have trail plans for mountain biking, but not overall trails plans, or a lack of recognition for the how the mountain bike trails fit into or connect to the overall community plans. This lack of clarity can be a source of confusion and sometimes tension between the various user groups, the administration and community leadership, and the general community. As a result, trail developments are proceeding in an ad hoc fashion that may not support or align with the overall development of the community. There is a need for each of the communities to undertake a process of either creating a clear and mutually beneficial vision for trails and recreation and to define how mountain biking supports or can be supported by that vision. Addressing and clarifying these issues will be important for ensuring the long term development and sustainability of mountain bike recreation and tourism throughout the region.

Tenure, Access & Regulatory Protocols

In some of the communities there was a fair amount of confusion and uncertainty around land tenure, access and management that would need to be addressed to ensure the development of sustainable trail systems. The local clubs and trail builders need to be provided with greater clarity regarding procedures, the jurisdiction of differing levels of government, in order to successfully proceed with the sanctioning and legal development of trails.

Local Capacity & Support

For each of the participating communities there were concerns over the ongoing capacity of the local community to develop and maintain the existing mountain bike trails systems. For communities with a developed trail system such as Burns Lake, Prince George and Smithers, there are concerns regarding the ability of the local bike club and volunteers to ensure the maintenance of extensive and growing trail networks. For some of the smaller communities with less developed trail systems, the concerns centre on a lack of knowledge or understanding of trail development, designations and permitting, limited volunteers and the ability to raise funds. Many of the local governments for the participating communities were prepared and eager to provide support to local clubs, even going as far as to ask local residents to initiate clubs with the promise of funding and support. Some communities who wanted to provide support to local clubs and trail builders weren't really sure how or what they could do. The local residents and leadership need opportunities to come together and better understand what their needs and resources are and how they can be aligned more effectively.

Community & Local Business Support

Developing and maintaining the support of the local community and local businesses was cited as a concern throughout all of the participating communities

Creating & Fostering Mountain Bike Culture

All of the communities identified the need to raise awareness and interest in mountain biking and trails recreation in the communities to ensure greater participation and support

Sustainable & Reliable Funding

All of the communities identified the need to explore and secure sustainable and reliable sources of funding to support trail development, and in particular, trail maintenance

Trail maintenance

Trail maintenance has been a key issue raised by each of the communities participating in this initiative on multiple occasions. 50% of the communities indicated that they had a program or plan for trail maintenance. The majority of the work is done by volunteers. Rounding out the efforts made by volunteers, some of the work is done by paid workers along with use of fire crew to provide some maintenance and brushing work.

Many of the clubs and communities participating in the project expressed strong concerns that, although there are some grants available for building trails, there are a limited number that provide funding for maintenance. As the trail systems grow in size addressing the capacity and providing support for local clubs to maintain the trails to proper standards in a sustainable manner will need to be addressed.

6.2 Market Readiness Assessment

A key part of the Northern BC Mountain Bike Recreation & Tourism Development initiative was to assess the market readiness of each community in regards to their state of development as mountain bike tourism destinations. During the Regional Engagement Tour and the follow up questionnaire as well as secondary research, the project team undertook an assessment and gap analysis of the existing infrastructure, services, amenities and other elements that are considered integral to the development of mountain bike recreation and tourism destinations. Each of the communities were evaluated on the presence of these elements and their relative development compared to other more established mountain bike destinations. The assessment is intended to provide an overall picture of the market readiness of each of the communities to cater to the Mountain Bike Travellers market.

The elements that were included in the analysis include the following:

- | | | |
|--------------------------|--------------------------|---------------------------------|
| ➤ Trail Plans | ➤ Trail Networks | ➤ Signature Trails |
| ➤ Dining & Entertainment | ➤ Bike Shops | ➤ Bike Friendly Accommodations |
| ➤ Supporting amenities | ➤ Maps & Signage | ➤ Local Bike Club |
| ➤ Events & Festivals | ➤ Marketing & Promotions | ➤ Mountain biking BC Membership |

Market Readiness Evaluation Matrix

Tourism Elements	Valemount	McBride	Prince George	Mackenzie	Fort St. James	Vanderhoof	Burns Lake	Houston	Smithers/ Telkwa	Terrace
Trails & Community Plans	★	★	★	○	○	■	★	★	▲	▲
Trail Networks	▲	■	★	■	■	■	★	○	★	▲
Authorized trails	■	■	★	■	■	▲	★	■	★	★
Signature trails	■	■	▲	○	○	○	★	○	▲	○
Restaurants/Pubs	★	■	★	▲	■	▲	★	▲	★	★
Bike shops	■	○	★	○	○	■	★	▲	★	★
Bike Friendly accommodations	▲	○	▲	■	■	■	★	■	★	■
Supporting Amenities (laundry, grocery stores, etc)	▲	▲	★	■	■	■	★	■	★	★
Trail maps & signage	■	○	★	■	■	▲	★	○	★	▲
Local bike club	▲	■	★	○	○	▲	★	▲	★	▲
Events	○	○	★	○	○	■	★	○	★	■
Marketing & Promotions	○	○	★	■	○	■	★	○	★	■
MBTA membership	○	○	○	○	○	○	★	○	★	○

○ Undeveloped

■ Underdeveloped

▲ Developed

★ Market Ready

6.3

Regional Profile & SWOT Analysis

The following provides an overview of the project region profile and provides a Regional Strengths, Weaknesses, Opportunities & Threats analysis.

Regional SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • The region is readily accessible with Highway 16 (Yellow Head) running through the entire region • Three regional airports with direct flights to and from Vancouver in Terrace, Smithers and Prince George • Limited passenger rail service across the region running between Edmonton and Prince Rupert • Car and passenger Ferry to Bella Coola and Port Hardy on Vancouver Island • Extensive crown land & trail building opportunities • Growing network of trails in each community that are legally sanctioned • Mountain bike clubs and advocates across the region actively working to achieve sanctioned status for trails • Supportive legislation in BC for trails development • Growing interest among municipal and district governments • Stunning geography and natural areas • The region possesses a broad range, diversity and depth of culture and history • Substantial numbers of committed and passionate volunteers • Active bike clubs in communities across the region that are growing and developing their capacity • Friendly & welcoming communities • Relatively close proximity of communities and riding areas (approx 2hrs driving distance apart on average) • Strong regional supporting infrastructure • Region has a strong culture and history of outdoor recreation and tourism • Municipal and district governments with a keen interest and willingness to support trail and 	<ul style="list-style-type: none"> • Communities across the region are still reliant on the resource sector for economic growth and stability • Remote when compared to other popular mtn bike destination in relation to key source markets such as the Lower Mainland, Alberta & the US • Few of the communities have specific and clear visions for trails and mtn bike recreation and tourism or supporting trails plans • Most of the communities do not have specific individuals or government positions to coordinate trail development or tourism • The region does not have a strong brand or awareness within the mtn bike market • Few of the communities are fully market ready leaving significant gaps through the area • Few of the communities have trail networks that are market ready • Very few market ready or signature trails currently available • Transportation to the area is difficult and expensive, particularly with bikes • The perception of transportation to the area is that it is even more difficult and expensive than it actually is • All of the local airports only have flights to and from Vancouver and no other major centres • There is no cohesive or collaborative strategies for promoting the area for mountain biking • A number of the communities have few or relatively poor supporting amenities such as bike shops, or campgrounds with showers, or ancillary & entertainment activities • There is a strong perception within the mountain bike market that there are few trail opportunities and the region is too far and inaccessible and expensive to visit • Though local governments are keen to support trails

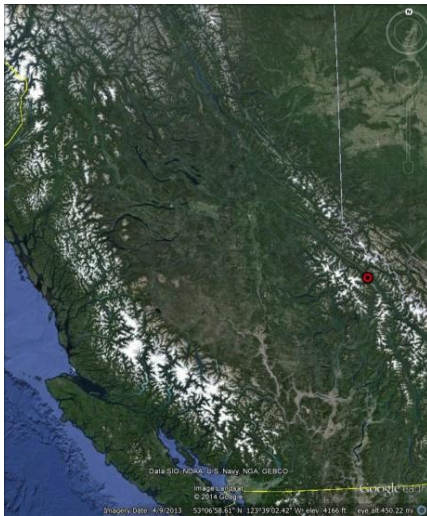
<p>mountain bike recreation and tourism</p> <ul style="list-style-type: none"> • Tourism agencies across the region are eager to promote and support mtn bike tourism 	<p>and recreation development, they do not necessarily know how or what support they need to provide</p> <ul style="list-style-type: none"> • Few of the communities have well established and stable mtn bike clubs and advocacy groups • Few of the communities have service sectors that have the awareness or understanding of the mtn bike tourism sector to provide appropriate services and experiences
<p>Opportunities</p> <ul style="list-style-type: none"> • Communities across the region are at a critical juncture, eager to transition from resource communities to alternative economic development with a strong focus on recreation & tourism • Prince George is hosting the Winter Games in February of 2015 which will bring a lot of focus and attention to Northern BC • Substantial opportunities for funding to support trail developments and infrastructure and programming for mtn bike recreation and tourism marketing • Mountain bike travellers are consistently looking for new opportunities and experiences • Growing interest in trails and mountain bike recreation throughout the region • Strong support for alternative and sustainable economic development throughout the north • Consumer demand for experiential and outdoor and adventure travel continues to grow 	<p>Threats</p> <ul style="list-style-type: none"> • Other regions are developing regional collaborations and aggressively marketing themselves as mtn bike destinations • Many of the communities have a small number of committed volunteers who rely on resource sector jobs that may be unsustainable or unstable. Several communities have lost mills or simply lost these volunteers due to mill closures or other changes in their economic or job prospects that results in a critical loss of key people for the development of trails and mountain bike recreation in the community • Private and access to crown land are creating barriers and challenges to the development of legally sanctioned and marketable trails • Other user groups in the area either have a perception of being threatened by the development of mountain bike trails (loosing access for their own sport or to funding) • There are tensions between the user groups and mountain bikers that is leading to difficulties in developing and maintaining trails • Funding & resources for trail maintenance is difficult to maintain for many of the communities and they are struggling to maintain the trails they have to a market ready level

6.4 Community Profiles, Infrastructure Assessment & SWOT Analysis

The following section provides an overview of the project region as well as each of the participating communities and their relative positioning as destinations for mountain bike recreation and tourism.

Each of the communities have successes and challenges that reflect their own circumstances, however there are many similarities and challenges that are faced throughout the region. Some of the communities, such as Burns Lake and Smithers, are fairly well advanced in the development of mountain bike recreation and tourism infrastructure and assets, while others such as Houston are at the earliest stages of development. All of the communities can provide lessons that would be instructive for others.

Valemount



Valemount, BC

Valemount gives the distinct impression of a community that is ready to establish itself as a destination for mountain bike tourism. The Valemount Area Recreation Development Association, which has successfully provided significant leadership and capacity in terms of developing the local snowmobiling recreational assets and market, have identified mountain biking as their summer season priority. This could provide the level of professionalism, capacity, planning and the ability to develop trails and mountain bike tourism programming, facilities and infrastructure. The community has a strong culture and history around outdoor recreation and tourism that will integrate with and strongly support mountain bike tourism. There are a number of experienced and qualified trail builders and riders in the community. Furthermore, there is a well established mountain bike club the Yellowhead Off-road Recreation Association (YORA). The community has a completed trails master plan with an ambitious vision for high alpine trails that are very attractive for mountain bike tourism.

There is a common consensus Valemount is not ready to be marketed for Mountain Bike Tourism. The community needs to determine what needs to be in place to be market ready.

Key Issues:

- Community has a clear plan and is preparing to move forward towards developing market ready trails and infrastructure
- Significant opportunity for high alpine trails
- Community has significant existing capacity
- Needs to fix missing bridge before any other opportunities can move forward

Trail Networks

There is a fairly substantial number of high quality trails in the area around Valemount. There are two main trail areas; one area which is called Swift Creek is characterized as mainly cross country single track. Access to Swift Creek is currently impeded by a washed out bridge. The District has applied for funding and expects to complete a new bridge by the fall, 2014. The second area is Five Mile Mountain which is immediately adjacent to the Swift Creek area. This area is characterized by shuttle access descending single track and steep fall line trails. There are no maps available for the trails and there did not appear to be any signage on the trails or elsewhere to provide direction to trailheads.

Facilities & Infrastructure

The District of Valemount has an abundance of services to support a local mountain bike tourism industry including the following:

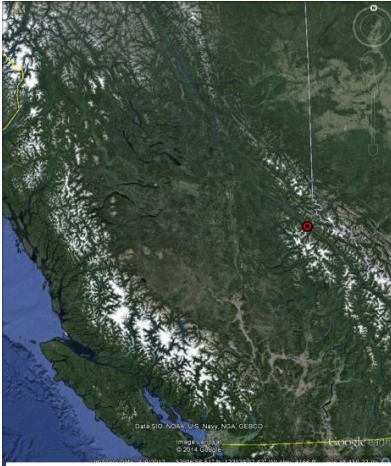
- A large number and broad range of accommodations and varying room rates and quality
- Several Campgrounds
- Local craft brewery
- A variety of choice in terms of restaurants, cafes, pubs as well as grocery stores and other related amenities including a bike shop that provides retail, rental and repair

Currently there is a lack of available trails maps and signage, which reflects the community's perceived lack of readiness for mountain bike tourism promotions. There are no local mountain bike tourism providers such as tour guides or shuttle services.

SWOT Analysis for Valemount

<p>Strengths</p> <ul style="list-style-type: none"> • Strong history and culture of outdoor recreation & trails • Local trail builders who have the experience and commitment towards building trails • Local recreational society (VARDA) as well as a local mountain bike club (YORCA) provide structure, planning and capacity for trails development and marketing and promotions • Community leadership & administration is highly supportive of trails and mountain bike recreation and tourism • Strong vision for developing into a destination for mountain bike tourism • Well developed trails and infrastructure plan for mountain bike recreation • Friendly and welcoming culture • Broad diversity of supporting amenities, hotels, accommodations, stores and restaurants, etc • Located on a major highway that experiences high levels of traffic from both southern BC and Alberta and Edmonton 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Relatively few developed or market ready trails • Community has little experience and exposure to marketing to and serving the mtn bike tourism market • No current trail maps or signage are available • Currently is missing key pieces of infrastructure (bridge) to allow access to key trail networks • There is no current retail outlet that caters specifically to the mtn bike market • There are currently no service providers (guides, et) that cater specifically to the mtn bike market • Valemount does not have a strong reputation or branding as a destination for mtn bike tourism • During the summer months it is largely known as a rest point for travellers driving between the interior and southern British Columbia and Alberta
<p>Opportunities</p> <ul style="list-style-type: none"> • Significant opportunities for developing trails in the area, especially in the high alpine areas which are very attractive for riders • Community is open to various forms of tourism and will likely embrace any opportunity to develop new markets • Significant volume of traffic that flows through Valemount from Northern BC and Alberta. Alberta has a robust and growing mtn bike recreation sector that could become a significant market for the community • Availability of crown land that is not located within parks around the community represents an opportunity to develop new mtn bike experiences 	<p>Threats</p> <ul style="list-style-type: none"> • Valemount will need to compete against more established locations such as Jasper to develop a brand as mtn bike destination • A large amount of the community's current accommodation capacity during the summer months is utilized by travellers passing through the community and spending relatively little amounts of time or money in the community. Ensuring there are accommodations spaces readily available to mtn bike visitors will be critical to establishing the community as a destination. If it proves difficult to access spaces, mtn bike tourists may consider other options where finding accommodations may seem easier to access

McBride



The Village of McBride views mountain bike recreation and tourism as a central and critical opportunity for diversifying and securing a larger portion of the tourism traffic that travels through the Robson Valley as well as enhancing the livability of the community for local residents. The Village approached some local riders and trail builders and encouraged them to establish a club called the Robson Valley Mountain Bike Association to provide a means for supporting the development of trails and mountain bike recreation in the community, with the long term goal of creating tourism opportunities. Thus far, the Association has coordinated the development of a very ambitious trails plan for McBride Mountain which overlooks the town. The village may face some challenges in its implementation due to the limited number of trail builders and local riders.

Key Issues:

- Community has an ambitious plan for developing mountain bike trails, but very little existing trails
- Limited capacity within the community for building and maintaining trails

Trail Networks

A small number of trails have been developed by local trail builders that are in the early stages of development and require upgrades and maintenance before they can be considered marketable or viable for a broad range of riders. A Trails Plan prepared by MTB Works/Joel Pernke identifies the opportunity for the development of a large variety of trails on the lower flank of McBride Mountain accessed by a forestry road. The development of a parking lot, campsite and a high alpine loop are also part of the plan.

A key recommendation would be to focus on one epic high alpine peak and then allow the descent from the top of McBride Mountain which connects to the lower trail network to support local residents and youth involvement.

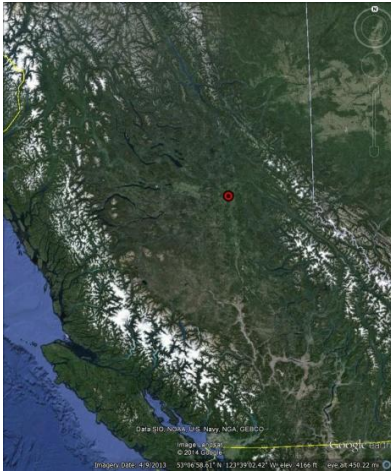
Facilities & Infrastructure

The Village has relatively few facilities or infrastructure to support mountain bike tourism. There are a small number of hotels, motels, lodges, rental cabins and campgrounds in the area, as well as restaurants.

SWOT Analysis for McBride

<p>Strengths</p> <ul style="list-style-type: none"> • The Robson Valley, in which McBride is located is a stunning area with significant geography and captivating views that are exceptional and inviting for tourists and mtn bike visitors in particular • Wide open valley with broad mountains with significant slopes represent optimal terrain for developing trails and mountain bike experiences • The Valley and the community are located on a major highway corridor that experiences substantial numbers of travellers from northern and southern BC and Alberta annually • Leadership, administration and residents are eager and committed to developing greater tourism opportunities and capturing a greater share of the tourism market that passes through the area • Staff with the expertise and willingness to prepare funding applications • The community has a strong vision backed up by an ambitious trail development plan • A mtn bike club that is actively building trails and working develop local participation a culture around mtn biking • Availability of crown land that is not located within parks around the community represents an opportunity to develop new mtn bike experiences 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Very little existing trail and none that could be considered market ready • Limited capacity within the community to develop or maintain a trail network of any size • Limited supporting amenities and services in the community and limited awareness or understanding of how to cater to the mtn bike tourism market • The community does not have any kind of bicycle retail outlet • Community is not established as a destination for mountain biking
<p>Opportunities</p> <ul style="list-style-type: none"> • Significant traffic and tourists moving through the area seeking experiences • Close proximity to Jasper and Edmonton, both of which have significant mountain bike markets, present significant market opportunities • Local terrain and geography have significant opportunities for developing high quality mountain bike experiences • Surrounding communities such as Prince George and Valemount are prepared to collaborate and support the development of trails • A number of residents with expertise and experience in trail development that are highly eager to develop local mountain bike experiences and services 	<p>Threats</p> <ul style="list-style-type: none"> • McBride has no reputation or branding as a destination and the community would be challenged to establish itself against other more well established destinations in the area • With limited resources and capacity, McBride will have great difficulty establishing market ready mtn bike experiences as compared to larger centres in the region

Prince George



Prince George has a large, well-established and growing number of trail networks in multiple locations around the community that serve as high quality recreational assets. There is a strong and growing mountain bike club and multiple trail users and builders. There is a need to provide more information and education about the social and economic impacts and opportunities related to mountain bike recreation and tourism within the community and to develop greater levels of awareness and support. The Prince George Cycling Club (pgcyclingclub.ca) is actively developing the local mountain bike culture, providing mountain bike instructional training clinics as well as coordinating and organizing trail development and maintenance. Tourism Prince George believes there is great potential for mountain bike tourism and is keen to work with the local club and neighbouring communities to promote the area.

The area does not have the significant landscape or mountain views that other areas such as Valemount or McBride possess, however, there is an abundance of trail opportunities that make the area attractive for mountain bike tourism and recreation.

Key Issues:

- Need to educate and raise awareness in the community and among municipal officials the importance of trails and mountain bike recreation and tourism opportunities
- Need to ensure that there is ongoing maintenance and management of an extensive trail system
- Need to develop a branding strategy that will differentiate Prince George relative to other destinations in the region

Trail Networks

There are two main networks of trails in Prince George including Pidherny Recreation Site, Cranbrook Hill, Forests for the World, and Otway.

The **Pidherny Recreation Site** is a 620 hectare area located about 12km to the northwest of downtown Prince George. The trail network is managed by the Prince George Cycling Club, through an agreement with Recreation Sites and Trails BC. The site caters to many different user groups, however most of the trails have been developed specifically for mountain biking. In total, there are 25 mountain bike trails, of which 12 are cross country/all-mountain, and 13 are freeride/downhill specific. Trail difficulty levels range from beginner (8%), with some intermediate trails (42%), to expert in nature (50%). The PGCC has committed substantial funding to improvements of the trail network, with

over \$78,000 spent in 2013 to develop two new trails, one being the club's signature trail, "Papa Woods".¹

Prince George and the Phiderny, in particular, have extensive use of wooden features, often with elaborate woodwork. This could represent an opportunity for Prince George to promote and differentiate their trails system by highlighting the wooden features that are unique and of high quality construction when compared to other areas.

Cranbrook Hill represents some of the more advanced trails in Prince George with runs that are steep with advanced features including gaps, jumps, and drops. The trails are not long and require shuttling.²

Forest for the World, which is located around the University of Northern British Columbia campus, is largely double track trails more suitable for beginner level riders with a small amount of single track.

Most of the trails in the **Otway Trail Network** are double track trails intended for skiing in the winter. There are many single track trails spread throughout the double track network. Many of these trails have steep sections and have good jumps built up on them. There are trails at Otway for riders of all skill levels.³

There are also a number of standalone trails including LC Gun (The Lovers Trail) and the Greenway.

LC Gun Trail is a semi-technical ride suitable for both beginners and experienced riders. This trail is technical due to a few sharp corners and the many roots covering the trail.⁴

The Greenway trail is a 22 km cross country trail that is largely double track and runs from the Blue Spruce Campground in College Heights through Forests for the World to the Otway trail network. There are no technical aspects to this trail, aside from wildlife.⁵

Facilities & Infrastructure

As the largest city in Northern BC with a population of approximately 72,000, Prince George has a broad number and diversity of facilities and infrastructure available to support mountain bike tourism including a significant number of accommodations, restaurants, grocery stores, bike shops, entertainment and other amenities.

¹ <http://pgcyclingclub.ca/programs/pidherny>

² <http://pgcyclingclub.ca/trails/cranbrook-hill>

³ <http://pgcyclingclub.ca/trails/otway>

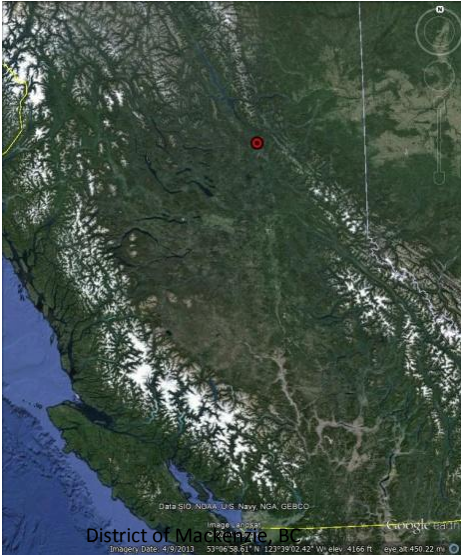
⁴ <http://pgcyclingclub.ca/trails/lc-gun-trail>

⁵ <http://pgcyclingclub.ca/trails/the-greenway>

SWOT Analysis for Prince George

<p>Strengths</p> <ul style="list-style-type: none"> • Located at the junction of two major highways, the gateway to the entire northern half of the province • Substantial trail network that are market ready and growing • Large airport with flights to and from Vancouver • Large and growing bike club with a substantial and growing number of volunteers • The bike club is already hosting competitive events • Bike club is actively encouraging and supporting the growth of mtn bike recreation with growing participation rates • Substantial number of competent and qualified trail builders • Local tourism agency is supportive of the development of mountain bike tourism experiences • Large number of supporting services and amenities • The community has a clear vision and trail plan for the Phiderny trails network • Strong mountain bike culture and a number of retail outlets that provide services • Substantial crown land in the area that provides opportunities for trail developments 	<p>Weaknesses</p> <ul style="list-style-type: none"> • The City administration does not have a strong vision or support for mtn bike recreation or tourism • The City has a poor reputation for crime and safety • The geography and terrain around the city, while suitable for trail building, does not offer the type of views and vistas that are attractive to mtn bike tourism (e.g. no significant mountain ranges within site)
<p>Opportunities</p> <ul style="list-style-type: none"> • There is substantial tourism traffic passing through the city that could be captured and retained within the community • There is substantial land areas that are suitable for trail development • As the gateway to Northern BC, Prince George has an excellent opportunity to play a role in attracting riders to the region • The community has a rich culture and heritage that, marketed properly, can be attractive for potential visitors 	<p>Threats</p> <ul style="list-style-type: none"> • Similar to other communities in the area, Prince George is susceptible to bust and boom economics and can be at risk of losing key human resources and expertise within the trail building and mountain bike sector • The trail system in the community is steadily growing and the volunteer based trail maintenance process is struggling to keep up and maintain the quality of the trails

District of Mackenzie



The District of Mackenzie has been actively developing multi-purpose hiking, horseback riding and mountain bike trails over the past several years through Job Opportunities Programs supported by the Provincial and Federal governments. The result is a series of well constructed, low elevation, beginner and intermediate level cross country trails. There are also a small number of trails that have been or are currently under development by local trail builders in the forest areas surrounding the community. The District views the development of trails and mountain bike recreation opportunities as important for enhancing the livability of the community as well as attracting visitors and tourists to the community and creating economic development opportunities. The District has been encouraging local residents to develop a mountain bike or off-road recreation association and they have indicated they are prepared to provide ongoing support. This is an important step as there is little to no organizational structure within the community to provide support for planning, building, and maintaining mountain bike trails.

There appears to be some concerns and tensions between the various trail user groups in the community, particularly between motorized and non-motorized users. Some mountain bike and hiking trails have been damaged by unauthorized motorized traffic. Having a local club could provide better communications and effective advocacy for access, preservation of trails as well as for pursuing the development of new trails in the future. A critical step will be for the District to pursue the development of a Trails Master Plan that will provide a clear vision for trail development (not just for mountain biking) and will provide the strategic actions required to address conflicts, encourage collaboration, as well as a greater understanding for how the District can support and empower local trail users.

Key Issues:

- Development of a Trails & Recreation Society
- Development of a Trails Master Plan
- Developing and implementing a process for identifying and designating trails
- Providing information on trails such as maps and signage

Trail Network

There is a small network of trails that have been built in and around Morfee Lake as well as a small number of informal, unsanctioned trails that have been developed by local trail builders in and around the community. Some of these informal trails are the source of tension with other user groups as there is no signage or programs in place to educate or limit use by motorized users on trails that are not build for motorized traffic. The trails around Morfee Lake

are of higher quality and fairly well built trails, however, the full network encircling the lake is not suitable for mountain biking.

Facilities & Infrastructure

There is an existing bike park that is underused and poorly maintained with the trails extending out along the shores of Morfee Lake. There are trails that circle the lake but according to our guides, not all are suitable for mountain biking. The bike park is somewhat removed from the community and since the development of a new skate park which is located immediately adjacent to the community recreation, visitation and use has dropped in recent months. This may also be due to the level of skill required to ride in the park.

Although the District of Mackenzie is a small community, there are a sufficient number of services to support mountain bike tourism including a small number of restaurants, pubs, grocery stores, accommodations as well as a municipal campground. There is no retail outlet that caters to the bicycle or mountain bike market in the community.

There is a fairly successful ski hill in the area, Powder King that does not currently provide mountain bike services or experiences, but is prepared to consider this market within the next five years.

SWOT Analysis for Mackenzie

<p>Strengths</p> <ul style="list-style-type: none"> • Strong culture and history of outdoor adventure and recreation • Well established as destination for outdoor recreation • Located on a provincial highway and a significant transportation corridor connecting the central and southern portions of the province with the north east • Substantial investments in trails and the local bike park • Quality accommodations and a municipal campground that can cater to the mtn bike sector • Supporting amenities including a small number of restaurants and pubs that have character and local flavor, as well as amenities such as laundry and a grocery store • The District government is supportive of and would like to see the development of mtn bike recreation and tourism • Residents with substantial skills, experience and interest in trail development • Growing number of residents who are participating in mtn bike recreation and are eager to develop a local club 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Very few trails that could be considered market ready • No trails plan or a specific vision for developing as a mtn bike recreation or tourism destination • Geography and terrain, though suitable for cross country and perhaps freeride mtn bike trails, does not have the degree of views and vistas that are highly attractive to mtn bike tourists • No retail outlet specifically targeted for the bicycle or mtn bike market • No established mtn bike or trails advocacy group • The district government, though eager to support trail development and mtn bike recreation is not sure how to provide support or guidance • Lack of communication and growing tensions within the community between different trail user groups, particularly motorized and non-motorized users • No branding or reputation as a mtn bike recreation and tourism destination • Located on a smaller transportation corridor and outside the main Yellowhead artery and will likely find it more challenging to attract visitors from outside The region
<p>Opportunities</p> <ul style="list-style-type: none"> • There is a medium sized and successful ski hill, Powder King, which is expressing an interest in developing mtn bike products and services in the long term (five years) that could potentially become a draw for the community • Substantial volume of crown land throughout the area suitable for development of mtn bike trails and recreation • Substantial amount of traffic that could be enticed to stay longer in the community with more outdoor recreation opportunities including mtn biking • Recent downturns in the local forestry and resource extraction industries provide funding opportunities 	<p>Threats</p> <p>The community is struggling to retain residents, particularly young professionals and families. As people from within these demographics leave, the community is losing critical resources and capacity for developing trails and recreational opportunities</p>

Fort St. James



The Town of Fort St. James has been quietly developing an impressive network of cross country trails within Mt Pope Provincial Park. Currently, according to the local riders who provided a guided site visit to the trail system, BC parks are supportive of the existing trail system and could be open to discussing expansions in the future. Similar to other communities in the area, the District of Fort St. James is keen to see the development of trails and mountain bike recreation in the area to enhance the livability of the community and to attract more visitors and tourists to the area. There are capacity issues in the community with relatively few volunteers and no organizational structure in place to ensure the sustainable maintenance of existing trails or the development of new ones.

A critical step for the community will be to support the development of a local mountain bike club as well as the development of a trails plan.

Key issues:

- Trail plan for the community
- Creation of a local trails and mountain bike club

Trail Network

The community has approximately 20km of well maintained cross country trails. One of the key issues identified by local riders involves maintenance as well as the lack of beginner level trails that will provide opportunities for new riders to enter the sport. There are other areas in the community that have had trails in the past, but they have since fallen into disuse.

Facilities & Infrastructure

The community does have a number of facilities, infrastructure and amenities to support mountain bike tourism including some accommodations (though these were limited and heavily used by various contractors), campgrounds, a small number of restaurants and pubs. There is currently no bike retail outlet in the community. Fort St James also has a National Historic Site near the center of town and is situated on the shores of impressive Stuart Lake.

SWOT Analysis for Fort St. James

<p>Strengths</p> <ul style="list-style-type: none"> • Located an area that already has as strong reputation for outdoor recreation and culture • Growing population • Well established and growing network of trails in one area on Pope Mtn and support from BC Parks • Current riders in the community are highly passionate and committed to their trail networks and towards developing them further • Trail system overlooks Steward lake offering significant and picturesque views for riders • Large parking lot and good access to the existing trail system • Committed trail builders and riders in the area who undertake consistent maintenance of the trails • Interest among the local riders to grow the sport and get more people involved • Community is well developed with a substantial number of amenities, campgrounds & restaurants that can support tourism • Community administration is supportive of developing mountain bike recreation and tourism opportunities • High quality signage and billboards already advertising the town on highway 16 • Availability of crown land that is not located within parks around the community represents an opportunity to develop new mtn bike experiences 	<p>Weaknesses</p> <ul style="list-style-type: none"> • No established mtn bike or trails club in the community to advocate and organize around mtn bike recreation and trails. This has resulted in some reluctance by the District to invest in development of new trail opportunities • Fairly small number of current riders in the community • No bike shop or retailer in the community • Limited progressive trail options for beginners and new entrants to riding
<p>Opportunities</p> <ul style="list-style-type: none"> • Local riders are able to list other potential trail opportunities in other areas of the community • BC Parks has expressed some willingness towards the expansion of mtn bike trails • Growing number of residents in the community who are interested in participating in the sport • Local First Nations have expressed some interest in getting their members and youth involved in mtn biking and trail developments • The community already receives fairly substantial numbers of tourism visitors each year who may be seeking new experiences & activities 	<p>Threats</p> <ul style="list-style-type: none"> • The community is already struggling to maintain the trail system. • There is limited capacity to expand or deal with increases to traffic and riders. • If the community developed tourism opportunities it's not clear they would have the ability to fully realize the potential benefits.

Vanderhoof



Vanderhoof, BC

Vanderhoof has been developing mountain bike and trails and recreation opportunities for the past several years and has a growing network. Mountain bike tourism is not a high priority for the community, however the development of recreational amenities that will retain and attract new residents to the community is. There is a local bike club, Rip'n the North that has been organizing volunteers and riders in the community to support the development of a local bike park and trails network. They currently offer instructional clinics for local residents and youth with the goal of building a local mountain bike and riding culture. There are capacity issues in the community as the club struggles to maintain volunteers, members and funding for their projects. The District of Vanderhoof has been providing ongoing support, assistance with grant and fundraising, and has provided a large area for the development of a bike park and trails.

Key Issues

- Maintenance of existing trails and park
- Trails planning for future expanded trail development

Trail Network

Currently there is approximately 5km of mountain bike trails at the Rip'n the North Bike Park. The District has dedicated a substantial area that could be used for future development. There are some multi-purpose trails within the community that provide opportunities for casual and beginner level riders.

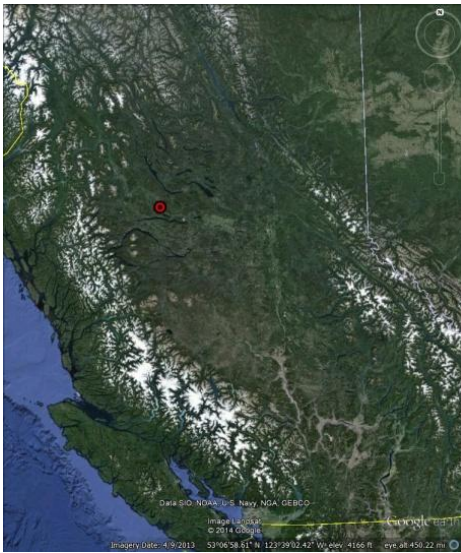
Facilities & Infrastructure

There is a fairly large bike park that includes a series of jumps, wood features as well as a pump track that is capable of hosting events. The town has a fairly substantial number of local services to support mountain bike tourism including hotels, motels, campgrounds, B & B's, as well as restaurants, pubs, grocery stores and other amenities. There is a local bike store.

SWOT Analysis for Vanderhoof

<p>Strengths</p> <ul style="list-style-type: none"> • Well-developed and maintained bike park and system of trails • Well established bike club (Rip'n the north) with growing membership & capacity • Located immediately adjacent to highway 16 with substantial levels of traffic and good access • Strong level of participation which continues to grow • Heritage village located near the trails that provides high quality opportunities for dining and amenities for visitors • Substantial number of supporting amenities including hotels, campground, laundry, etc • Programming to encourage youth and residents to get involved in the sport • Established program and plan for managing and maintaining the park and trails • District administration is supportive of mtn bike recreation though not especially for tourism • The overall community is supportive of mtn bike and trails recreation and for the district to make continuing investments • Community is currently working on a trails plan for the area which should provide future direction • Terrain surrounding the community is highly conducive for the development of high quality trails for recreation • The District has provided a large area to allow for significant new trail opportunities • The availability of crown land that is not located around the community represents an opportunity to develop new mtn bike experiences 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Though the administration supports mtn bike recreation development, there is not strong support for tourism • The trail system is growing but there are no signature trails (it's not clear if this level of development is being contemplated for the trails plan) • There is not a high level of awareness in the community about the growing trails • There are challenges for ensuring ongoing maintenance of trails and any expansions could lead to issues with appropriate upkeep • Though the terrain is good for mountain bike trails, the area does not possess the types of dramatic geography and views that are conducive for mtn bike tourism • The community does not have a mtn bike specific retailer or bike shop
<p>Opportunities</p> <ul style="list-style-type: none"> • The trail system is quickly growing and may be able to host race events in the near future • The community is advantageously located on Highway 16 and could capture a higher percentage of riders travelling between Smithers/Burns Lake and Prince George 	<p>Threats</p> <p>May not have the capacity to fully maintain or implement trails strategy</p>

Burns Lake



Burns Lake, BC

The Village of Burns Lake has made significant strides towards becoming a world class mountain biking destination. Since 2006, the Burns Lake Mountain Bike Association has overseen the development of an extensive network of trails and multiple bike parks offering a broad diversity of riding opportunities for all levels and types of riders from cross country to downhill. Recently, Burns Lake was designated as Canada's First IMBA Ride Centre in recognition of the large-scale mountain bike facilities that are family friendly and offer something for all types of riders. In addition the, BLMBA hosts the Big Pig Bike Festival which is an annual event with multiple race events and various categories and attracts riders and visitor from across the region and the province. The BLMBA also hosts and coordinates a multitude of bike events, clinics and activities designed to support and build upon the culture of mountain biking in the area. It is a stated vision of the club to develop a strong culture and for Burns Lake to become a mountain bike community.

As a destination, Burns Lake has experienced substantial and rapid growth over the past several years. The community supported the bike park and has actively sought out opportunities to become more involved with the bike club and expand the events and reputation of the bike park to benefit the broader community.

Like many other destinations, Burns Lake has had great success; however they do appear to be experiencing some challenges. There appears to be some miscommunications between the Village and the bike club with regard to the vision for mountain bike tourism and development in the community which has lead to misunderstandings around the planning and logistics of the bike festival. This has lead to some tensions and uncertainty about the future of the bike festival. There also appears to be some degree of uncertainty and tensions over amount of funding and resources that have gone into the Bike Park and trails compared to other community groups. The Village is experiencing pressure to provide greater assistance and opportunities to other community groups. The Village has expressed a need and a desire to undertake a process to develop a broader trails and master plan process that could identify and explore strategic options for addressing these challenges and ensure the long term sustainability of the trails system. It could also produce a broad, mutually beneficial and consensual vision for trails and recreation in the community.

Key Issues

A clear vision for mountain bike tourism: the community needs to develop a clear consensus and clear mutually beneficial vision for mountain bike trails and culture in the community

Trails & Recreation Plan – the community needs to develop a plan for trails and recreation that provides support, where necessary, to other user groups

and to ensure greater coordination and collaboration between groups. A trails and recreation plan would also provide some clarity and guidance on issues around tenure, access and jurisdiction that exist between the Village, the District, as well as Recreation Sites and Trails.

Community Connection to the Trails Network: there appears to be a lack of awareness in the community regarding the nature of the trail system that has been developed on Boer Mountain and the growing economic impacts. Many stakeholders who attended the workshop expressed dismay and concerns that the community did not have a strong enough connection to the area or that the benefits have not been felt by a broader cross section of the community. This kind of disconnect could have a long term adverse impact on the sustainability of the trail system and any efforts by BLMBA or the Village to develop a brand as a 'mountain bike community'. This seeming lack of awareness is not the result of a lack of effort on any part by BLMBA, which has been actively promoting the bike park and mountain biking in the community through a number of various activities and programs, or the Village. The issue may require creative thinking and new strategies for creating greater awareness and understanding of the bike park, the connections to the community and the economic and social benefits.

Marketing & Promotions – Burns Lake, along with Smithers and perhaps Prince George, have the most readily marketable trails and products to support the growth of mountain bike tourism industry in the area. In order to continue to grow the tourism market, these three communities have the most immediate gains to be experienced from a collaborative effort at marketing and promoting the region as a destination for mountain bike tourism.

Sustainable Funding – Burns Lake has experienced substantial success in raising funds for the trail network on Boer mountain, approximately \$800,000 over the past several years. These funds have largely been grants and though there is good reason to believe trail funding opportunities may continue to some degree in the future, there is a strong interest in the community to begin exploring options and strategies for sustainable funding, particularly in regards to trail maintenance, which is often not supported by grant programs.

Trail Maintenance – there are some concerns about the ability to keep up with the maintenance of the trail network. The BLMBA has managed to do a substantial job of maintenance but there is a need to explore possible options for paid trail maintenance in the future.

Trail Network

Since 2006, the BLMBA has been working with trail professional and local builders to build more than 40km of singletrack, 20km of downhill trails and four bike parks. The signature trail – When Pigs Fly – contains more than 100 berms, tabletops, and other features. The bike park also has a 25km cross country trail.

Facilities & Infrastructure

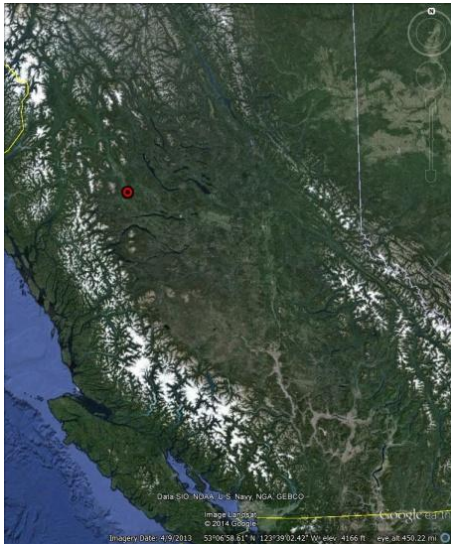
The community has a substantial number of facilities and infrastructure to support mountain bike tourism including a free campground and RV sites located at Kager Lake immediately adjacent to the trails system on Boer Mountain. The campground is a mix of drive-in and walk-in campsites and does not have washroom or shower facilities. In the town, a short drive away, there are multiple hotels and motels, with one facility, the Sunshine Inn that has established itself as bike friendly by providing secure bike storage, washing station and a space for making repairs. The community also has a number of restaurants and a bike shop that offers bike rentals and shuttle services.

SWOT Analysis for Burns Lake

Strengths	Weaknesses
<ul style="list-style-type: none"> • Extensive and well developed network of trails that are market ready & already attracting significant numbers of visitors • Received a designation as an epic ride centre by IMBA • Well established mountain bike club with high capacity, large and growing membership • Well-established maintenance program for the trail system • Well established program for encouraging and supporting new riders to enter the sport • Well established mtn bike shop that offers retail, repairs and other services • Experienced trail builders • The Village and the District administration as well as the local Chamber of Commerce are highly supportive and actively promote the community • The district provides assistance with fundraising and proposal writing • Strong community support for mtn bike trails and recreation • Strong reputation and brand as a mountain bike destination • Well developed website along with information & maps available • Trails have excellent signage and are well mapped • Well-established mountain bike festival that draws riders from the region and provincially and even nationally and internationally • There are several signature trails and a newly developed epic cross country trail 	<ul style="list-style-type: none"> • The trail network is located outside the community and the only connection between them is a dirt road with substantial vehicle traffic • Misperceptions and miscommunications: <ul style="list-style-type: none"> ○ There is a perception within the community that the social and economic benefits of the trails are disconnected and not largely experienced by the community as a whole ○ miscommunications between the village and the bike club has caused some tension and may be inhibiting promotional efforts and opportunities to further grow the community for tourism

<p>Opportunities</p> <ul style="list-style-type: none"> Community has a growing reputation as a destination for mtn bike tourism Riders from within the region and from the Yukon and Alberta are travelling to the area which could represent untapped markets 	<p>Threats</p> <p>The miscommunications and disconnect within the community could derail future fundraising and development opportunities if not addressed</p>
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Houston



Houston, BC

Houston is just beginning to develop opportunities for mountain bike recreation and tourism in their community. In the interest of diversifying the tourism products and experiences, as well as enhancing the recreation opportunity for residents, Houston undertook the development of a trails plan for mountain biking. The community sees the development of trails as not only important for creating new economic development opportunities but also for attracting and retaining residents in the community. Located halfway between Burns Lake and Smithers, the town would like to position themselves as the perfect location to stay while riding in the area.

Key Issues

- Need to pursue funding for additional trail development
- Engage more people, particularly the youth in mountain bike recreation and trail development
- Municipality is juggling many priorities, local riders and community members need to clearly articulate their interest and support for trail development to ensure it remains a priority

Trail Network

At this time, only 1.7km of trail has been built. It is a machine built single track and suitable for intermediate to advanced riders. The terrain has excellent views of the Bulkley Nechako Valley and the Telkwa Mountain Range and is highly suitable for trail building. The community is actively seeking funding for further trail development opportunities.

Facilities & Infrastructure

The town has a substantial number of accommodations, campgrounds and restaurants. There is one outdoor store that sells bikes and is starting to include mountain bikes in their product mix. The store has taken an active role in the planning and development of the local trail network and is interested in providing other future services including shuttling and guiding if possible. The community is also interested in developing a bike park and youth

programming to support the development of mountain bike recreation in the community.

SWOT Analysis for Houston

<p>Strengths</p> <ul style="list-style-type: none"> • Located on Highway 16 half way between Smithers & Burns Lake, both of which have high population and solid reputations as mtn bike recreation destinations • Excellent terrain and geography that his highly conducive to mtn bike recreation and tourism • A mtn bike trails plan has been completed and is ready for implementation • One short mtn bike trail has been completed providing example of the opportunities and a source of pride and inspiration • Many amenities in the community top support mtn bike tourism • Residents and local riders are highly committed to and passionate about trail development and mtn biking • Strong support from the District administration and the Chamber of Commerce • Strong history and culture of outdoor recreation and tourism 	<p>Weaknesses</p> <ul style="list-style-type: none"> • A lot of development needs to occur before the town could attract riders or satisfy needs of locals • Recent closure of a mill is causing many people to leave community including key individuals with the capacity required to develop local programming • Few people in the community with capacity to build trails and provide development of local riding community – must come from outside community for the time being
<p>Opportunities</p> <ul style="list-style-type: none"> • Recent closure of the mill has created awareness and interest by funding and government agencies to support new development opportunities in the community • Area is becoming known for mountain biking and Houston is in a position to capture traffic from both the east and the west along the Yellowhead Corridor • Community residents are ready for change and willing to embrace new opportunities than they might otherwise • The availability of crown land that is not located around the community represents an opportunity to develop new mtn bike experiences 	<p>Threats</p> <ul style="list-style-type: none"> • More people may be forced to leave community causing a drain in capacity and local participation • Community has competing needs for long term investment and short-term job creation that could dominate over trail building

Smithers & the Village of Telkwa



Smithers, BC

Similar to Burns Lake, the Town of Smithers has a well-developed community and culture around trails and mountain bike recreation and tourism. The community is actively promoting and branding the town as an outdoor recreation destination and moving towards establishment of a resort municipality similar to Whistler. The Town sees mountain bike recreation and tourism as critical elements to the development of the community and is prepared to consider any strategies that will lead to further development and enhancement of the products and experiences that are available. The community has an active bike club, the Smithers Mountain Bike Association (SMBA) who are coordinating the development and maintenance of the trail system as well as other activities such as bike meet ups, group rides, and instructional clinics. The SMBA has also organized and is currently operating one of the most successful Sprockids programs in the province with up to 80 youth registered for the next session⁶.

There are concerns with capacity and the ability of the club and the community to ensure the proper maintenance of the trails. The community would like to explore and find funding to support a paid position for trail maintenance. The club has received corporate funding for trail maintenance in the past, a three year commitment that they would like to see reinstated.

The community would like to attract a greater number of visitors from other markets such as the Lower Mainland, Alberta and elsewhere, but has limited resources. They strongly believe that a regional approach is key.

Key Issues

Need to develop a sustainable program for trail development and maintenance in particular

Pursuing designation as a resort municipality

View a regional marketing effort as key to developing tourism

Trail Network

Smithers has a substantial network of trails from fast flowy single track to epic mountain rides to technical downhill. There are three main trail network areas including the Bluff Recreation Site, Piper Recreation Site and the Ptarmigan Recreation trails. There are also a number of trails in other areas of the Bulkley Valley⁷ including Cronin Pass, a high alpine trail in Babine

⁶ Sprockids is a multi faceted program engaging thousands of young people in mountain biking. The program is now used in over 20 countries by teachers, coaches, cycling clubs, youth organizations, law enforcement agencies, and parents (<http://sprockids.com/>)

⁷ <http://smithersmountainbike.ca/trails>

Mountain Provincial Park. The SMBA has a well-developed website that provides descriptions and trail maps which can be found at smithersmountainbike.ca.

Facilities & Infrastructure

The Town of Smithers has substantial facilities and infrastructure including hotels, restaurants, pubs, bars, and campgrounds (including a municipal campground on the banks of the Bulkley River that offers free wifi and is within riding distance of the trail networks). There are several bike shops in the community that provide services for the mountain bike community.

SWOT Analysis for Smithers & Telkwa

<p>Strengths</p> <ul style="list-style-type: none"> • Well developed and growing trail system • High developed trail maps and signage • Signature trails such as Piper Down and Huckin' eh that are generating awareness of the area • Strong mountain bike club with growing membership • Robust sprockids programming that is growing the sport in the community • Large professional population and riders and outdoor recreation community • Strong community of trail builders • Strong and well developed outdoor recreation and mtn biking and trails culture • Several bike shops that cater to and serve the mountain bike recreation market • Regional airport with direct flights from Vancouver • High supportive administration as well as business community • Well developed community core and attractive downtown area • Large volume of supporting amenities throughout the community within riding distance of the trails with strong interconnections • Strong brand and awareness as a outdoor recreation destination • The availability of crown land that is not located around the community represents an opportunity to develop new mtn bike experiences 	<p>Weaknesses</p> <p>Local bike club already utilizing limits of capacity to maintain trails and spearhead future developments</p>
<p>Opportunities</p> <p>Town is seeking to have Smithers designated as a resort community which could provide substantial funding for future developments and marketing</p>	<p>Threats</p> <p>Overstretched capacity within the club and volunteer burnout could affect maintenance of existing trails</p>

Terrace



Terrace, BC

The City of Terrace may very well be on the edge of an economic surge with the potential development of pipelines and LNG gas industry processing and facilities. The City is seeking opportunities to encourage greater tourism and sees trails and recreation as an important part of the strategy as well as for attracting and retaining residents. The community has an active outdoor recreation society, the Terrace Off-Road Cycling Association (TORCA) which functions as an advocacy and coordinating group between hikers and mountain bikers. The local riding community, however, appears to be somewhat fragmented, with TORCA essentially providing event insurance and trail authorization. There is a need for more proactive coordination of trail management and for uniting the riding community. There are a number of different active trail builders in the community.

Similar to Smithers and Burns Lake, there is a strong interest in developing trails for tourism as well as for recreation assets for community residents. The community believes there may be potential markets in the Yukon and Alaska. There is a need for greater management and coordination as well as a more sustainable model for funding and support. There are management plans in place for a number of the riding areas, but there may be a need for an overall Trails Plan for the community.

Key Issues

- Need greater coordination and unity among the trail building and riding community
- May need to explore the possibility of creating an overall trails master plan
- Sustainable funding model with consideration towards corporate funding

Trail Network

Terrace has several fairly well developed trail networks including Terrace mountain and Copper Mountain that have a range of trail difficulties and types from cross-country to downhill. The trails are well built and maintained. There are also a fairly large number of trails throughout the community including beginner and intermediate trails. There are plans for developing a significant amount of new trails in the near future. The local builders appear to have a healthy relationship with the land managers including the City and Recreation Sites & Trails BC and are working to ensure the trails can be legally sanctioned if they haven't been already.

Facilities & Infrastructure

The City has a large number of facilities and infrastructure to support mountain bike recreation and tourism including a broad variety of accommodations and campgrounds, restaurants, pubs and entertainment. There is one bike shop in the community, McBike, which is actively involved in the mountain bike community and has expressed an interest in implementing a Sprockids Program.

SWOT Analysis for Terrace

Strengths	Weaknesses
<ul style="list-style-type: none"> • Large and growing population with a strong demand for outdoor recreational opportunities • Well developed culture and history of outdoor recreation in the area • Growing number of local riders and builders with a high level of interest in participation and volunteering • Located on highway 16 with substantial volumes of visitor traffic • Regional airport with direct flights from Vancouver • Supportive city administration and local business community • Strong community support for trail investments and development • Growing trail network that are receiving legal sanction and protection • Strong local club that has the capacity to advocate for and support trail developments • There is a trails plan in the community that is being implemented • Local terrain is highly conducive to mtn biking and tourism • Well developed community core and downtown area • Large number of amenities available to support tourism • Trails that are within easy riding and driving distance from the town centre • Relatively strong support from the community • Local mtn bike retailer that provides quality services and products to the local mtn bike community • The availability of crown land that is not located around the community represents an opportunity to develop new mtn bike experiences 	<ul style="list-style-type: none"> • Relatively few trails available that are appropriate for beginners and intermediate level riders • No trails maps that are widely available to the public or signage on the trails • No community programs to encourage new riders and or participants • More community awareness and support needs to be developed to ensure long-term growth and sustainability • The existing club TORCA has relatively little structure beyond being a fundraising group – the group needs to be developed further or a new specific mtn bike club formed



Opportunities <ul style="list-style-type: none">• Terrace is growing and new economic growth and development is attracting people to the community, particularly young professional seeking outdoor recreation opportunities• LNG & pipeline developments could provide a particularly strong population boost – this could also mean funding opportunities• Awareness of Terrace as an outdoor recreation and mtn bike destination is growing	Threats <p>If LNG or pipeline developments do not proceed, the slowdown in economic activity could impact population growth in the community and possible opportunities for funding</p>
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