



Exploring the Market Potential for Yukon Mountain Bike Tourism

by Jane Koepke



**Cycling
Association
of Yukon**

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Executive Summary

The following study was conducted in response to a mutual interest on the part of Tourism Yukon and the Cycling Association of Yukon to explore the market potential for mountain bike tourism in the territory. The study aimed to determine the following:

- Size and characteristics of the global mountain bike market;
- Current product delivery in mountain bike tourism;
- Future trends in mountain bike tourism;
- Strategies and stories behind successful mountain bike destinations;
- Strengths and weaknesses of the Yukon with respect to the development of a mountain bike tourism industry;
- Potential strategic areas of growth and opportunity for the Yukon; and,
- Potential economic benefits of Yukon mountain bike tourism.

The study was undertaken through a combination of attendance at key mountain bike industry events, literature review, secondary market research, targeted industry canvassing, and a focus group with Yukon tourism and mountain bike stakeholders.

The results of the secondary market research showed that mountain biking is one of the world's most popular adventure sports. Approximately 12 million people in the US mountain bike regularly, with per capita rates of participation (approximately 4%) estimated to be similar in Canada, the UK, and German-speaking Europe. Mountain bikers are generally well educated males 25-45 years of age with high household incomes. Mountain bikers tend to prefer the sport over other activities, participate in it frequently, and maintain this participation over the long-term. Women are a rapidly increasing segment of the market.

Industry experts predict that the strong growth of lift-assisted bike parks will lead to a mainstreaming of the sport, similar to the role ski resorts played in the development of snowboarding. The popularity of long-distance "epic" races and multi-day stage races indicates that there is also a large segment of mountain bikers who value a more adventurous experience. Some tour operators predict that the next phase of mountain bike tourism will be high performance riding in exotic wilderness locations.

Destination reputation and recommendations from friends and family are key travel decision making factors for mountain bikers. Mountain bikers consider variety/difficulty of terrain, number of trails, and scenery to be the most desirable features in a mountain bike destination. A large percentage of mountain bikers travel, and participate in the sport almost exclusively during their mountain bike trips. Mountain bikers show a strong preference for singletrack and their willingness to pay in the travel decision making context is directly related to the abundance and variety of singletrack.

An examination of successful mountain bike destinations within the context of adventure traveler behavior raises several key lessons for regions aspiring to develop mountain bike tourism:

- Destination image persists, so make sure it's positive.
- A reputation is built more on substance than style.
- Small is beautiful.
- Partnerships and politics product results.
- Build it and they will come.
- Create an experience, and make it unique.
- Numbers do count.

These lessons, when applied to the Yukon situation, suggest that a healthy mountain bike tourism industry could develop as long as a market-responsive destination image is created, the trail product and level of supporting services meet visitor expectations, and strategic partnerships can be formed.

The focus group highlighted a number of important advantages the Yukon has in developing a mountain bike tourism industry: a frontier reputation, world-class scenery, wilderness, a legacy of mining roads and trails, convenient air access, a strong network of wilderness tourism operators, existing events, potential partners, and a strong mountain biking community in the capital region. Disadvantages include: limited bike “friendly” accommodations, shortage of singletrack in the communities, potential visitor misconceptions and fears about the Yukon, lack of signage and user friendly maps for most trail systems, and the sport’s low profile in the business, tourism and First Nation community.

The development of a mountain bike tourism industry presents many opportunities for the territory. The focus group saw mountain bike tourism as a means to reclaim some of the cultural and historical values lost when the territory’s once extensive trail network was abandoned in favor of highway travel. They felt that mountain biking could become a source of pride and focus for Yukon youth. They envisioned a trail network that would build on existing trails and tracks to provide the best singletrack in the world. Most importantly, they envisioned a tourism industry that would respect local capacity and values, maximize economic and social benefits to Yukoners, and provide quality, authentic experiences for a variety of users.

Mountain bike events and tourism could create substantial economic opportunities for the Yukon. A Canada Cup mountain bike race and an international multi-day race/event would have an estimated \$360,000 and \$585,000 economic impact for the territory, respectively. A thriving mountain bike tourism industry attracting approximately 4500 riders per year would generate about \$5.76 million in the local economy. Furthermore, the singletrack trail expansion that would facilitate mountain bike tourism could have economic impacts in excess of \$10 million.

Mountain bike tourism has significant potential for growth as a niche Yukon tourism market. Demographics and geographic markets dovetail with the broader target demographics of Yukon Tourism. Mountain biking would support many ongoing tourism initiatives, including the growth of destination tourism throughout the Yukon and attraction of major sporting events. An improved wilderness trail system would create year-round recreation, interpretive and business opportunities for Yukoners. Most importantly, it would assist in positioning the Yukon as a world-class wilderness destination by ensuring that the territory’s trail product meets the expectations of a discriminating global adventure travel market.

Recommendations arising from this report are as follows:

Short Term:

1. Establish a working group to develop a more detailed vision and action plan for Yukon mountain bike tourism.
2. Initiate the process of educating the tourism, business, and First Nation communities about the market potential for Yukon mountain bike tourism.
3. Initiate discussions with the City of Whitehorse to develop a signage scheme to assist mountain bike tourists.
4. Identify potential partners and resources required to host a Canada Cup race in preparation for preparing a bid to host an event in 2008. (Note: the Canadian Cycling Association will host its Annual General Meeting in Whitehorse in fall 2005).
5. Identify the funding and organizational structures required to realize the above stated goals.

Medium Term (2-4 years):

6. Develop a simple user-friendly guide or brochure detailing mountain bike rides, businesses, and services in Whitehorse, including maps tied to trail signage initiatives.
7. Undertake a pilot project in partnership with a Yukon community, including trail signage and building initiatives and a recreational program for youth.
8. Undertake a feasibility study for the creation of a long-distance non-motorized trail network in the Yukon, identifying strategic locations, potential project partners and funding.
9. Develop initiatives to support a 2008 Canada Cup race (assuming a bid is successful) and maximize its promotional and marketing potential for Yukon mountain bike tourism.
10. Develop a mountain bike-specific destination positioning and marketing plan in partnership with Yukon Tourism and the wilderness tourism industry.

Long Term (5+ years):

11. Work with interested Yukon communities to enhance the economic and recreational benefits of singletrack trails.
12. Develop a long-distance wilderness trail network in strategic areas of the Yukon to facilitate major events and enhance trails-based and year-round tourism opportunities.
13. Stage a world-class mountain bike event to enhance the Yukon's mountain bike destination image.

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Whitehorse, Yukon
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Exploring Silver Rush Trails on Montana Mountain, near Carcross, Yukon Territory

photos by Derek Crowe

Introduction

Mountain biking is one of the most popular adventure sports in the world. Its appeal lies in its fitness benefits, challenge, opportunity to experience nature, and social aspects. Over the last twenty five years, millions of people around the world have tried the sport and become dedicated enthusiasts.

Mountain bike tourism is a growing segment of the adventure tourism market. In particular, destination mountain biking is one of the engines fueling this growth. Communities or regions hoping to position themselves as mountain bike destinations must evaluate their “product” as it relates to global trends in the sport, competing destinations, and their target markets. These questions provide the focus for the following study.

Study Background

With its vast network of tote roads and trails, as well as its unsurpassed scenery, the Yukon is a great place to mountain bike. For the most part, this resource has been enjoyed by local residents and a small collection of visitors seeking out unique riding experiences.

In 2002, BIKE magazine (both US and German editions) assigned and published a feature length article extolling the virtues of the “frontier” Yukon riding experience. Outside magazine followed up in 2003 with a multi-page spread on the Yukon, featuring local operator Wayne Roberts’ tour on the Sam McGee trail outside of Carcross. The same year, “The Ride Guide” produced a feature length television segment highlighting mountain biking in the territory.

The International Mountain Biking Association (IMBA) has also taken an interest in the territory. Advocacy Director Dan Vardamis has visited Whitehorse several times and met with local tourism officials and the City of Whitehorse in 2004. He followed up this visit with a bulletin in IMBA’s website, stating that:

“The Yukon may have more potential for mountain biking than anywhere else I’ve ever seen. It already has a lot going for it: abundant, excellent trails, committed advocates and a mystique that naturally draws people to the Yukon. It’s important now that cyclists get more organized to take things to the next level.”

Does the Yukon have the necessary ingredients to succeed as a mountain biking destination? The Cycling Association of Yukon (CAY) wanted to explore the question further, and submitted a proposal to the Yukon Tourism Product Development Fund in August 2004. The following report is the product of that funding, and represents the first of many steps on the path to the “next level” of Yukon mountain biking.

Study Objectives

The objectives of “Exploring the Market Potential for Yukon Mountain Bike Tourism” were as follows:

- To explore established and projected trends in mountain biking and mountain bike tourism;
- To identify the key elements of successful mountain bike tourism destinations and the markets they target;
- To provide general and destination specific data and information related to the economic benefits of mountain bike tourism;
- To identify the strengths and weaknesses of the Yukon with respect to the development of a mountain bike tourism industry;
- To make general predictions as to the potential economic benefits of mountain bike tourism in the Yukon;
- To make recommendations as to potential strategic areas of growth and opportunity towards the development of a Yukon mountain bike tourism industry; and,
- To generate interest and ideas from local stakeholders towards the development of Yukon mountain bike tourism.

Study Approach

To achieve the objectives stated above, a number of tasks were undertaken:

- Attendance at North Shore Credit Union World Mountain Bike Conference in Vancouver, BC in August, 2004;
- Attendance at the INTERBIKE industry exposition in Las Vegas, Nevada in October, 2004;
- Site visits to Moab, Utah and Fruita, Colorado in October, 2004;
- Secondary research, including a review of existing mountain bike market research, economic impact literature, Yukon tourism information, and related studies;
- Interviews with Outside contacts involved with various aspects of mountain bike tourism (tourism officials, Chambers of Commerce, independent tour operators, government representatives, etc); and,
- A facilitated session with a select group of Yukon tourism and mountain bike “experts”/stakeholders to develop a vision, conduct a “Strengths, Weakness, Opportunities, and Threats” (SWOT) analysis and provide recommendations for the development of a Yukon mountain bike tourism industry.

Part I. Mountain Biking: Definitions, Participation, Demographics and Rider Patterns

A Brief Definition

Mountain biking may be best described as a segment of cycling that is focused primarily on off-pavement travel. Mountain bikes are designed with wider tires, a more upright riding position, and lower gearing than their on-pavement counterparts, and can accommodate a wide variety of riding surfaces, including pavement, gravel, rock, and most soils.

Design is one part of the equation, but the sport is also largely defined by the nature of the riding surface itself. (For example, a mountain bike may be ridden on pavement, but this would not be considered “mountain biking” per se.) Gravel or dirt roads provide experiences on the less rigorous end of the mountain biking spectrum.

The terms “doubletrack” and “singletrack” are often used in describing mountain bike travel. Doubletrack refers to routes that were either created by or are wide enough to accommodate passenger or all-terrain vehicles (ATVs). Singletrack refers to a trail or pathway that is only wide enough to accommodate users traveling in single file.

Singletrack cycling is the most highly sought after experience for mountain bikers. Singletrack provides users with a closer connection to nature, segregation from motorized vehicles, and a more challenging or varied experience than doubletrack or roads can provide.

Levels of Participation

From its rather humble beginnings in the late 1970s, mountain biking became one of the fastest growing outdoor activities in the latter part of the twentieth century. Participation levels in the sport grew by over 400% between 1987 and 2000. Today, tens of millions of people in North America and Europe own mountain bikes, and of these, millions are enthusiasts in the sport.

Mountain Biking 101: The Roots

By most accounts, the origin of modern mountain biking can be traced back to Marin County in the mid-1970s. A loose organization of bike enthusiasts would meet up to tackle local fire roads on one-speed “klunkers” on fat, balloon tires and customized with drum brakes and derailleurs. In 1976, the group began hosting a recreational downhill series (called the Repack Races) that became a forum for riders to share ideas and enthusiasm about this new style of bicycle. Word of the races spread quickly, and by the late 1970s, the mainstream cycling media had caught on to the trend and several of the original Repack organizers went on to found the first mountain bike manufacturing companies.

Mountain biking grew steadily in popularity throughout the 1980s. The sport’s “renegade” reputation soon caught up with it, however. With the growth of the sport and corresponding increase in the number of riders out on the trails came a backlash of land owner and trail user conflicts, resulting in many trails being closed to mountain bikers. The International Mountain Biking Association (IMBA) opened its doors in 1988 in an effort to advocate for the sport, with a mission to “create, enhance and preserve trail opportunities for mountain bikers worldwide.” They continue to do this work today from their head office in Boulder, Colorado.

Source: Mountain Bike Hall of Fame

In the US, about 46 million people rode a bicycle on singletrack in 2001, the highest per capita participation being in the western States. Between 1994 and 2003, regular participation ranged between 4-6% of the nation's population, representing approximately 14 million riders. This number is substantiated by the International Mountain Biking Association's estimate that between 10 and 12 million people in the United States participate in the sport regularly.

In the UK, statistics point to similar per capita levels of participation. In the UK, cycling and mountain biking accounted for 4% of an estimated 1.3 billion countryside leisure day visits for 2002/03. Of the estimated 11.8 million people who own a mountain bike in the UK, approximately 1.3 million ride off-road a minimum of 2-4 times per month.

Mountain biking is very popular in other parts of Europe as well. In Germany, 3.5 million of the nation's 7.2 million recreational cyclists are mountain bikers. The per capita populations of recreational cyclists in Switzerland and Austria are very similar to Germany, suggesting that there are about 800,000 mountain bikers total in these countries. Other major mountain biking nations in Europe include Italy, Spain, France, Belgium, and the Netherlands.

The Role of Racing

From the beginning, the evolution of mountain biking was closely tied to racing. From the legendary Repack Race that gave rise to the sport, recruitment into the sport relied in part of both non-competitive and competitive racing. In 1983, the National Off-Road Mountain Biking Association (NORBA) was founded to govern the sport in the United States. The sport truly came into its' own in 1990, however, when the Union Cycliste International (UCI) sanctioned the first mountain bike World Championships in Durango, Colorado:

"...that first UCI World Championship changed the way the world looked at mountain biking. Up until that weekend, mountain biking had been a uniquely American sport. A casual attitude, a competitive spirit and a rigid bike were tools of the trade... suddenly, mountain biking had gone international. The top riders of the weekend all rode suspension forks across the finish line and technological progress was jumpstarted..."

BIKE magazine, Vol.7, No.7, August 2000

Mountain biking continued to gain momentum and legitimacy in the sporting world, becoming an Olympic event in 1996. Throughout the 1980s and most of the 1990s, the sport was primarily cross-country focused and bikes were designed and manufactured to weigh less and ride faster.

The author estimates that per capita participation in mountain biking in Canada is on par with the US and Germany (approximately 4%), resulting in approximately 1 million participants.

By no means is the popularity of mountain biking limited to the North American or European continents; the sport is also thriving in countries such as South Africa, Australia, and New Zealand.

Demographics

Studies and surveys conducted on mountain bikers in recent years indicate mountain bikers are mostly males in their mid-20s to mid-40s, with relatively high levels of income and education, are single or married, and are likely to not have children at home.

Most studies contained very similar results with respect to education levels. In one US survey, 70% of respondents possessed a post-secondary education. Another US study showed that 31% of mountain bikers had an advanced post-secondary degree, with another 35% having earned a bachelor's degree. A high percentage (36%) of riders in a New Zealand study came from professional or technical backgrounds.

Incomes were consistently high in most of the studies. Half of respondents in one US study had household incomes of at least \$75,000. Two-thirds of respondents in a separate study maintained an annual pre-tax salary of \$60,000 or more. Another survey showed 64% of mountain bikers had household income of \$50,000 or higher.

In the studies reviewed, females represented between 12-16% of the survey sample. The studies are consistent on gender distribution in the sport, but there is less certainty on the age of participants. In one US study, the average age of respondents was 38; in another, the average age was estimated at 29. The age ranges provided by other studies would indicate that most participants are in their mid-20s to mid-40s, with riders in the 35+ group comprising approximately 30% of mountain bikers.

The marital and parental status of mountain bikers is less easily determined. In one US study, 35% of respondents were married or partnered with children at home; another 34% were single; and 31% were married or cohabitating without children. Another survey found that the majority of riders lived in a two to four person household. Over two-thirds of mountain bikers were married or partnered in another study.

The mountain biker demographic will experience a gender shift in coming years. Between 2002 and 2003 in the US, women's participation in the sport increased 33.9%, as compared to 5.6% growth overall. Women's representation in the sport will continue to grow, as it has in other adventure sports such as snowboarding and skiing.

Rider Patterns

Mountain bikers tend to participate in the sport frequently, indicate a preference for the sport in comparison to others, and become more dedicated with increased years of involvement in the sport.

In one US survey, most mountain bikers reported riding a minimum of 4-6 times a week. Another study found that mountain bikers rode an average of 4 times per week in the summer. About half of respondents in another study reported riding between 2-4 times a week. About 50% of surveyed New Zealand mountain bikers rode a minimum of 1-2 times per week.

Freeriding Takes Flight

The next phase of evolution in the sport was sparked by a small group of trail builders and riders north of the 49th parallel. In the coastal forests surrounding the municipalities of North and West Vancouver, locals such as "Dangerous" Dan Cowan and Todd "Digger" Flander began crafting a new style of trail, featuring elevated sections such as log rides, ladder bridges, and teeter totters.

It was the early 1990s, and most riders on the North Shore were still riding cross-country mountain bikes. As this new style of trail emerged, the built features posed a degree of difficulty (and risk) that pushed the very limits of both riders and their bikes. The term "freeriding" was coined to describe this new phenomenon.

Early mountain bike movies such as "North Shore Extreme" and significant coverage in mountain bike magazines pushed both the North Shore and freeriding to the forefront of the mountain biking world. Rider and industry trends followed closely behind, with the sport shifting markedly from its cross-country focus to a greater emphasis on steep descents and gravity moves.

Bike manufacturers began designing models with heavier frames and increased suspension to withstand the more punishing riding style. The whole "attitude" surrounding the sport changed, with riders abandoning the lycra-clad racer stereotype in favour of more relaxed attire and body armour.

It is about ten years since the North Shore and freeriding first emerged on the world stage, and the sport has continued to develop and re-define itself to the extent that the concept of freeriding is no longer confined to built features or jumps. IMBA recently defined freeriding as "a style of mountain biking that celebrates the challenges and spirit of technical riding and downhill."

Sources: nsmb.com and IMBA

In a study of US mountain bikers, 1.3 out of 8 million reported that the sport was their favorite activity. New Zealand mountain bikers reported significantly higher participation in the sport than in other activities. In another study of US mountain bikers, 85% of respondents considered the sport “important” or “extremely important” to them.

One US study determined that the majority of mountain bikers who “dropped out” of the sport during the 1990s belonged to the segment that rode infrequently. In contrast, the number of enthusiasts tripled in number. These findings would strongly suggest that people who mountain bike frequently tend to remain with the sport on a long-term basis.

Mountain bikers who stay with the sport also tend to participate more in volunteer or advocacy activities. A New Zealand study showed a high correlation between number of years of participation in the sport and increasing club and volunteer involvement. The majority of respondents to one mountain bike club survey had been with the sport between two and ten years. In general, the sport’s growth depends on higher levels of volunteerism than is inherent in most adventure sports, primarily due to ongoing trail access issues and need for trails maintenance and construction.

Mountain Biking Media

As is the case with many adventure sports, photography, film, and television have been instrumental in shaping trends and creating destinations in the mountain bike world.

The rapid emergence of freeriding and ensuing marketing shift from mountain biking as sport to “lifestyle” was due partly to photography and film. Major mountain bike publications devoted an increasing share of space to photographs depicting everything from North Shore exploits to the simple pleasures of riding scenic singletrack. Photography continues to fuel the imaginations and travel aspirations of mountain bikers worldwide.

Mountain bike movies have played a similar role, evolving from amateur video productions to 16 mm films with extensive budgets. These films play an important role in promoting mountain bike destinations, as well as the careers of the celebrity athletes they feature. The New World Disorder and Kranked series, both Canadian, are two of the longest running and most popular productions.

Television coverage is more variable. Major sports networks such as Outdoor Life, XTreme Sports, and Sportsnet feature mountain bike programming, including the World Cup circuit. Ride Guide is probably the best known television show in Canada regularly covering mountain biking. Now in its 9th season, Ride Guide is broadcast in Canada and Europe to about 20 million households.

Major mountain bike publications in North America include Mountain Bike Magazine, Mountain Bike Action, Bicycling, BIKE, and Dirtmag. Singletrack and Mountain Bike Rider magazines are two of the better known UK publications. BIKE magazine (German edition) has one of the larger distributions in Germany.

Sources: Ride Guide, BIKE magazine

Part II. Mountain Bike Tourism: The Product Spectrum and Emerging Trends

The Adventure Travel Context

Sport/adventure tourism is the fastest growing sector in the tourism industry at present. Adventure travel in general has exhibited one of the highest rates of growth in the industry in recent years. One in two US adults have taken an adventure trip in the past 5 years. Canadians ranked outdoor activities as the second most common travel behavior after visiting friends and family.

The size of the mountain bike component of the adventure travel market is difficult to determine. One of the greatest limitations in acquiring good data lies in the fact that mountain biking is often included under the broader category of cycle tourism in tourism based literature and studies. There are some useful clues, however. A major study commissioned by the Travel Industry Association of America found that mountain biking ranked 3rd (behind whitewater rafting and snorkeling) as the top “hard” adventure activity undertaken by adventure travelers.

The Product Spectrum

Mountain bike tourism encompasses a broad range of products and experiences for travelers. Some products cater almost exclusively to the seasoned mountain biker, while others provide “softer” experiences for those seeking an active, leisurely experience. The following section provides an overview of the various products that comprise mountain bike tourism, and the potential market and revenues associated with them.

- UCI Competition

The Union Cycliste International (UCI) is the worldwide governing body for the many events that now comprise mountain bike competition. UCI events take place at the national, continental, and international levels. The Canada Cup series represents the highest caliber of mountain bike competition in the country. Both series include numerous individual Cups in addition to a National Championships.

The Canada Cup series is typically hosted at cross-country or downhill ski resorts throughout the country. Canada Cup events typically attract between 150-300 competitors. (Attendance typically peaks during Olympics qualifying years as athletes try to earn as many UCI points as possible). Media coverage varies depending on the event promoter and the efforts that are made to attract television or print coverage. The “Ride Guide” television series often covers Canada Cup events.

The small town of Rocky Mountain House, Alberta, hosted Canada Cup cross-country and downhill races in 1998 and 1999. A post-event economic impact analysis estimated that 2.5 non-residents (comprised of coaching staff, family, friends, spectators, etc.) attended the event for every competitor. The combined economic impact from the two events was estimated at approximately \$4 million.

The World Cup series typically includes one or two venues in North America, with the rest located mostly in Europe. Past Canadian venues include: Bromont, QC, Canmore, AB, and Grouse Mountain, BC. World Cup organizers anticipated over 450 athletes, 75 international media members, and 25,000 spectators for the three-day event.

The World Championships is the premier event for most mountain biking disciplines, and accordingly attracts the largest field of competitors. World Championships host cities tend to be smaller mountain resorts, and often lack convenient air access. Livigno, Italy, host of the 2005 UCI World Championships is a small ski resort town of 4000 located two hours from any major airport. Rotorua, New Zealand is preparing to host the 2006 World Championships.

The media exposure and economic benefits of these events are significant. At the World Championships in Lugano, Switzerland in 2003, over 350 print and broadcast media were accredited and more than 64 hours of television coverage of the competition was broadcast in over ten countries. The field of competitors for the marathon event alone exceeded 1000 people.

- Skills Camps

Skills camps provide hands-on learning for both beginner and more advanced riders looking to improve their mountain biking abilities. Dirt Camp is one of the longest-lived of these programs in the US, offering week-long, weekend, 4-day, juniors' and women's only clinics in over 15 locations throughout the country.

Skills clinics or camps are often offered in established mountain bike destinations, or feature celebrity instructors. For example, Western Spirit Cycling Adventures, one of the largest bike tour companies in the US, offers 5-day "adventure camps" featuring Alison Dunlap, US World Mountain Bike Champion. The Whistler Mountain Bike Park has built a strong skills camp program on the celebrity coach model, offering weekend and week-long freeride and gravity camps taught by some of the world's foremost freeriders.

Women's only camps are in particularly high demand in western Canada. The Sugoi Dirt Series began in 2000 as a BC provincial sport development initiative aimed at recruiting more women into mountain biking. The series has proven to be immensely popular and has expanded from a few camps in the Whistler area to 16 camps in two provinces and four western states for the upcoming 2005 season.

UCI Competition

The Union Cycliste International (UCI) is the worldwide governing body for mountain bike competition. For years, the UCI World Cup program focused exclusively on the cross-country and downhill disciplines. Since 2002, 4-cross, trials and a marathon event have been added.

In 4-cross competition, four cyclists race down a short course (typically 250 metres) that includes jumps and turns. Trials events require athletes to negotiate technically difficult sections without touching the ground. The marathon event is typically around 100 kilometres in length.

The World Cup 2005 calendar consists of eight events in each discipline, plus a World Championships. In addition to the World Cup and World Championship events, there are continental championships each year. Athletes from countries in North and South America compete in the Panamerican Championships.

The Canada Cup Mountain Bike Series represents the highest caliber of cycling competition in the country, and is administered by the Canadian Cycling Association (CCA). The 2005 series consists of six cross-country and six downhill events, as well as one championship event for each discipline. A national ranking is maintained for all Canada Cup championship categories in cross-country and downhill disciplines and the standings are used as one of the selection tools for members of the Canadian National Team.

Sources: UCI, CCA

- Festivals

Mountain bike festivals are popular because they combine the social and competitive aspects of mountain biking, and cater to families and riders of all abilities. The potential

Fat Tire Festivals

Mountain bike festivals, often dubbed “fat tire” festivals, offer a fun, social environment for mountain bikers to convene, race, and ride. The scale and attendance of these events varies widely.

Crested Butte Bicycle Week is one of the longest running community-organized fat tire festivals in the United States. The 25th anniversary edition this June will feature 5 days of epic rides, racing, skills clinics, and parties.

Started in 1990, the Sea Otter Classic in Monterey, CA calls itself the “celebration of the bicycle.” The Sea Otter includes NORBA races, fun races, a large industry exposition, freeride and slopestyle competitions, and a busy schedule of social events. The Sea Otter attracted about 60,000 spectators in 2004 and was broadcast on Outdoor Life Network.

The Bike Italy festival in Lago di Garda, Italy is one of Europe’s largest, with over 18,000 participants. The format is similar to the Sea Otter Classic.

Whistler continues to redefine not only the sport but the festival format with its 4-day CRANKWORX event, featuring gravity-focused competition, mountain bike demos and expo, and a rock concert series. The event garnered two weeks of televised coverage on Sportsnet in Canada.

Sources: BikeRide.com, Dirt Rag, and pinkbike.com

economic benefits gained from these events depend largely on their size and scope. For example, a mid-sized, primarily grassroots event such as the Fruita Fat Tire Festival attracts over 800 people each year, with an estimated economic impact of \$1.5 million (US).

Fat tire festivals not only have an immediate economic effect, but also play a significant role in creating longer-term benefits for a region. The Chequamegon Fat Tire Festival in Wisconsin attracts over 3500 people to the area, and has been pivotal in establishing the Hayward Cable area as a Midwest mountain bike destination. A 1997 study determined that the annual economic impact of mountain biking (apart from the Festival) for this rural area of about 15,000 residents was approximately \$1.2 million (US).

- 24 Hours Races

24 Hours racing is a relative newcomer to the world of mountain bike competition. The objective of 24 Hours races is for both teams and soloists to complete as many laps as possible in a 24 hour period.

Laird Knight of West Virginia’s Granny Gear Productions is generally credited with pioneering the 24 Hours format with the inaugural 24 Hours of Canaan (now

Snowshoe) in 1992. The event became extremely popular, appealing to mountain bikers’ sense of fun and teamwork. Granny Gear Productions expanded their schedule of 24 Hours events to three other venues throughout the US. These events attract a substantial number of participants, volunteers, and spectators. The 24 Hours of Moab in October, 2004 drew over 4500 people to the Moab area over a weekend.

The 24 Hours of Adrenalin is the other major 24 Hour event promoter in North America, hosting a series of 6 races in both Canada and the US. They also host the 24 Hours of Adrenalin World Solo Championships, which attracts top riders from all over the world. The 24 Hours of Adrenalin event in Canmore is the single largest cycling event in Alberta, attracting about 1600 participants in 2004. Registration for the event typically sells out months in advance.

- Tours

Mountain bike tours encompass a wide range of riding experiences and options, from 14 day hut-to-hut tours in the Italian Alps to day-long fly-in wilderness epics in the Southern Chilcotin Mountains of British Columbia. The common feature is that they provide the mountain bike tourist with a guided experience. Other amenities such as accommodation and meals may be included as well, depending on the type and length of tour.

One of the largest companies offering mountain bike tours in the United States is Western Spirit Cycling Adventures based out of Moab, UT. They specialize in multi-day fully catered and supported trips throughout the United States on both singletrack and doubletrack trails. Their 2005 catalogue includes over 35 mountain bike packages across the country, most scheduled on a weekly basis during the riding season.

British Columbia is home to the majority of mountain bike tour operators in Canada, most of them smaller owner-operated companies. In keeping with BC's global reputation for freeriding, many companies offer freeride-specific tours. Other mountain bike niche products "pioneered" in BC are fly-in and heli-biking, most of which takes place in the Southern Chilcotin area.

Multi-day tours are the most popular and profitable packages offered by the BC tour companies that were solicited for research purposes. Fernie Fat Tire Adventures' six-day "Best of the West", "Gravity Fed", and "Best of BC" trips were the most sought after, with day trips having the least demand. Bush Pilot Biking, based out of North Vancouver, reported that 5-14 day custom tours are their strongest product right now.

Big Mountain Bike Adventures is a Whistler-based tour company that is opening up markets in "exotic" mountain bike destinations such as Costa Rica, Switzerland, and Morocco. Owner/operator Chris Winter reported that his most popular package is the Switzerland trip, and that he is "just scratching the surface in terms of exotic locations."

- Support Services for Independent Travelers

As is the case for many adventure tourists, mountain bikers will often travel to destinations independently. This segment of the market relies on a large variety of support services during their destination mountain bike trips. These services include:

- Suitable accommodation, including campgrounds, hotels, B&Bs, huts, preferably with safe bike storage and located in close proximity to riding areas;
- Reliable and professional mountain bike repair and retail shops;
- Transportation services such as bike shuttles;
- Maps and guidebooks for riding areas;
- Showers and bike washes (particularly for campers); and,
- Restaurants, brew pubs, grocery and liquor stores.

- Long-Distance (Epic) Races

“Epic” is a term that has multiple meanings within the context of mountain biking. An epic ride is one that tends to be of a longer distance and duration (usually about a full day) and holds considerable value for riders in terms of scenery, challenge, unique features, etc. Most epic rides would include large amounts of singletrack. Epic races are typically long-distance events in which solo participants compete against one another in a variety of categories.

Long-distance, or epic, races have become very popular in recent years. In the United States, these events are often called “centuries”, as they cover 100 mile or kilometre distances. Some of the more renowned ones include the Leadville Trail 100 in Colorado, the Shenandoah 100 in Virginia, and the Cascade Creampuff in Oregon. In its 15th year, the Leadville’s current field limit of 750 riders is filled via lottery within a few days of registration. The Cascade Creampuff’s 110 starting positions are filled within two weeks.

The calendar of long-distance races in Canada is considerably less full than in the United States. The best known epic race in the West is the 67 kilometre Test of Metal in Squamish, BC. The field limit is set at 800 participants (and the 2005 race was full in early January this year). Called “marathons”, one-day long-distance races are very popular in Europe. One of the most notorious is the Salzkammergut Trophy in Bad Goisern, Austria. The 2004 event included 203, 101, 47, and 24 kilometre long courses, with almost 2000 participants competing.

The economic impact of these events can be substantial. The Subaru Ore to Shore Mountain Bike Epic held in Marquette, Michigan, attracts approximately 1000 riders from outside the Marquette County area and has an estimated economic impact of \$1.3 million (US). A participant survey determined that 55% of the non-resident participants stayed in the region for 3 nights, and 50% spent between \$300-400 (US). The KONA Colville Connection in New Zealand is one of the premiere mountain bike events in the country. Attracting about 1300 riders, the day-long event generates about \$500,000 (NZ) for the local region.

Long-distance races appeal to an older demographic than might be expected, given the considerable physical challenges they present. At the Squamish Test of Metal in 2003, 38% of competitors were entered in the 30-39 men’s category and 26% participated in the 40-49 male class. 13% were 30-39 year old women, and 10% were 19-29 year old men.

- Bike Parks

Bike parks are a relatively new product in mountain bike tourism. A bike park is essentially a purpose-built riding area. Bike parks vary widely in size and scope, from small urban areas analogous to skateboard parks to lift-assisted mountain biking at ski resorts. Bike parks provide riders with an accessible, convenient means to enjoy the sport and improve their skills. Approximately 45 profit-oriented bike parks opened around the world in 2003. The majority of these were in North America and Europe.

It is lift-assisted bike parks in particular that are showing significant growth. Initially reluctant to embrace the sport, many ski resorts are now aggressively pursuing mountain bikers. Lift-assisted bike parks make both environmental and economic sense,

containing freeriding to designated areas and providing ski resorts with a strong off-season attraction. Approximately 175 ski resorts offered mountain biking in 2001, although today an estimated 25-30 of these offer lift-assisted “gravity” oriented riding.

Whistler Mountain Bike Park is the global leader in lift-assisted bike parks. Opened in 1999, attendance has increased from approximately 10,000 visits to 80,000 in 2004. The busiest day in 2004 saw 1400 riders in the park. The park attracts predominantly younger male advanced freeriders, but most other market segments are showing growth.

- Multi-Day Stage Races

Multi-day stage races have become major mountain bike sporting events in the past ten years, sparked in part by the popularity of adventure racing and the resurgence of interest in longer distance riding. As opposed to most UCI World Cup-level competition, these races are open to both professional and amateur riders. The most established of these events attract international televised coverage and major corporate sponsors.

These events are attracting riders from all over the world in ever increasing numbers. The popularity of the TransAlp race format is particularly impressive. The inaugural TransAlp Challenge in 1998 had a field of 220 teams; within a few years, the field limit of 350 starting positions was full, and another 3000 teams were on a wait list. For the 2005

Multi-day Stage Races

Multi-day stage races are a relatively recent phenomenon, sparked in part by the popularity of adventure racing and the resurgence of interest in longer distance riding. These events draw international media attention, and often feature professional and amateur riders.

La Ruta de los Conquistadores in Costa Rica is the oldest of the major multi-day races held presently. Started in 1993 by a local rider, the 3-day stage race covers over 300 miles and 30,000 feet of climbing on a historic wilderness route that the Spanish conquerors blazed from the Pacific to the Atlantic.

The TransAlp Challenge, an eight-stage race from Mittenwald, Germany to Riva del Garda, Italy, began in 1998. The TransAlp race covers over 700 kilometres and 72,000 feet of climbing. Participants compete in teams of two, and each stage includes meals and an awards ceremony where the winners of each category are awarded Leader jerseys.

The inaugural TransRockies Challenge, sister event to the TransAlp, was held in 2002. The seven-stage race begins in Fernie, British Columbia and ends in Canmore, Alberta. The Cape Epic followed in April 2004. This eight-stage race traverses more than 900 kilometres of the Western Cape of Africa. In contrast to the other TransAlp-style races, The Cape Epic places special emphasis on the travel experience itself, featuring unique stage parties that showcase local culture and traditions.

Sources: Ruta de Los Conquistadores, Upsolut MV, Pink Bike, and Cape Epic

edition, the field limit was again expanded to 1000 racers, and all starting positions were taken within one hour of registration starting. BIKE magazine (Germany) and Adidas are the major sponsors for the event.

The number of competitors in the TransRockies Challenge, the TransAlp’s sister event, has grown steadily since 2002, with 119 teams competing this past summer. Travel Alberta contributes \$100,000 to the event, and used its sponsorship to leverage a UCI

World Cup in Calgary in 2004. Since its inception, the TransRockies event has generated two weeks of unrepeated international television coverage for Alberta.

The Cape Epic, the newest member of the TransAlp-style family, appears poised for long-term success as well. For the second race, scheduled for April 2005, the 250 South African team positions sold out in less than 5 hours, and the 150 international spots and corporate entries were sold out 3 months later.

Emerging Trends

In predicting future trends in mountain biking, the example of snowboarding provides a useful starting point. In the mid-1980s, snowboarding was a predominantly male, “fringe” sport that was banned at most ski resorts. Manufacturers, movies, and vertical magazines were the promotional vehicles for the sport, generating a relatively small but dedicated following. Over time, ski resorts embraced snowboarding, and the sport expanded to a much broader demographic. Today the sport could be considered “mainstream”, occupying a large share of the winter ski resort market and appealing to people of all ages and abilities.

With the rapid growth of bike parks around the world, mountain biking is positioned to evolve in a similar manner. Several industry insiders presenting at the World Mountain Bike Conference predicted that increased participation in mountain biking will depend on how “big” the bike park phenomenon becomes. Bike parks will make mountain biking easy and accessible to a broader group of people. This mainstreaming is already evident in the rapid growth of certain segments of the market, most notably women.

The BC mountain bike tour operators canvassed believe that bike parks are good for business. Whistler-based operator Chris Winter sums it up well: “I think that lift access riding is great for mountain biking. It creates more sales and hype and makes destination mountain biking an option.”

The destination mountain biking option is by no means confined to lift-serviced bike parks, however. The element of adventure is critical role to the sport, and has a strong influence on how mountain bike tourism will evolve. The popularity of long distance cross-country rides and marathon-style racing demonstrates that a healthy segment of the market is already seeking out unique and challenging experiences. As the bike park phenomenon grows, the value of these experiences will only increase.

Again, the ski industry provides a blueprint for future direction of mountain bike tourism. A spectrum of opportunities will become the norm for mountain biking: everything from lift-serviced resorts to self-supported or fully assisted backcountry adventures. Industry insiders are already anticipating this trend. “The next phase in the evolution will be high-end performance riding in way out situations”, predicts Johnny Smoke of Bush Pilot Biking. In particular, exotic destinations with significant wilderness resources will be ideally positioned to offer the “way out” situations that riders of the future will seek out.

Part III. Destination Mountain Biking: Travel Patterns, Success Stories and Lessons for Aspiring Destinations

Travel Patterns of Destination Mountain Bikers

A 2003 study of IMBA members conducted by Donna Green sought to determine the travel patterns of destination mountain bikers . About 80% of respondents had taken at least one trip of one or more nights for the purpose of mountain biking. The average length of all destination mountain biking trips was 4.6 nights, with most days spent mountain biking exclusively.

When asked to rate the various factors that influence their choice of mountain bike destination, participants indicated that reputation and word-of-mouth were critical. Internet research, mountain bike magazine articles, and a mountain bike race or event were other common factors influencing destination choice. Please refer to Table 1.

Factors	Rating (out of 5)
Reputation of destination	4.0
Recommendation from friend/relative	4.0
Internet research	3.4
Mountain bike magazine article	3.2
Mountain bike race or event	3.2
Guidebook	3.1
Bike club	3.1
Article in a general outdoor magazine	2.7
Brochure	2.6
Travel agent	1.6

Table 1. Factors Influencing Destination Choice

The study showed that destination mountain bikers seldom book a mountain biking trip through a tour operator, and that the overwhelming majority bring their own bike. Respondents showed a preference for simple accommodations, with 45% camping on mountain bike trips, 40% using small lodges or inns, and only 8% using hotels. Trips with friends and family accounted for 40% of travel, while 31% travel with friends only.

Destination mountain bikers also rated the importance of a variety of features and attributes in making a destination appealing for a multi-day mountain biking trip. The most important attributes were: variety and difficulty of terrain, the number of trails, and scenery. The availability of other outdoor activities was the lowest rated attribute, providing further indication that mountain bikers tend to focus specifically on mountain biking while on their trips. Please refer to Table 2.

Features/Attributes	Rating (out of 5)
Variety/difficulty of terrain	4.5
Number of trails	4.4
Scenery	4.3
Reputation as a mtb destination	3.9
Cost of trip	3.7
Weather	3.7
Strong mtb community/culture	3.5
Ease of getting to destination	3.4
Other facilities (bike shops, accommodation, etc.)	3.3
Availability of other outdoor activities	3.1

Table 2. Desirable Features/Attributes in a Mountain Bike Destination

The study would indicate that mountain bikers' spending is contingent on the quality of the riding experience in a given destination. This trend is substantiated by other studies of mountain bikers which demonstrated a high "willingness to pay" (WTP) in mountain bike tourists visiting world-class destinations. Mountain bikers' WTP has been studied in a state park context and was shown to be a function of the amount of singletrack in the park, as well as the distance to a "substitute" singletrack experience.

Destination Theory

As global tourism becomes more competitive, understanding the dynamics that influence the development of not only destination image, but destinations themselves, is key. Early in the travel decision making process, travelers will accumulate mental images about a particular location and modify those images by gathering further information. These impressions are then subsequently modified based on the vacation experience itself, and communicated to others.

Adventure-based destinations tend to evolve in a phased manner, with "immature" destinations appealing to early "explorer" and "drifter" traveler groups seeking unique experiences. As the destination matures, the product and market components expand, the possible result being that the experience lacks the excitement and exploration that first led visitors to the area. Increasing facilities and attractions for tourists may dissuade the earlier "explorers" from repeat visits, as well as decrease their word of mouth advertising. However, adventure is a largely individualistic experience, and the same psychological level of adventure may be achieved by a wide variety of experiences in a given destination. Destinations that can address the full range of tourists and their adventure "thresholds" are better positioned to develop their tourism resources efficiently.

Success Stories

As the following section highlights, there is no one proven method for creating mountain bike destination. Each of the communities, regions, and countries profiled here followed its own unique path in enacting mountain bike tourism.

- Moab, Utah

Any discussion of mountain bike destinations necessitates a mention of Moab, Utah, arguably the world's pre-eminent mountain bike mecca. This reputation holds up to closer scrutiny: in the 2003 IMBA study of travel patterns, nearly half of destination mountain bikers residing in the western US had reported visiting Moab, and about 1/5 of destination mountain bikers living in other regions of the US had visited as well.

Moab offers virtually every mountain bike related product and service conceivable: numerous tour companies offering day trips and multi-day tours; hotels and B&Bs with bike repair rooms and safe bike storage; bikes washes and drop-in showers; and five full-service bike shops. The Bureau of Land Management (BLM) and the local county jointly operate the Sand Flats campground, which is located in close proximity to the most popular rides in the area. Moab also hosts several major events each year, including an annual Fat Tire Festival and 24 Hours of Moab, both held in October. For the most recent 24 Hours of Moab, approximately 2000 competitors and an additional 2500 volunteers, support staff, friends, and family were expected in Moab.

Moab's rise to mountain biking renown started in the early 1980s. The scores of desert backroads surrounding the town - a legacy of the uranium mining boom of the 1950s - became a magnet for non-resident mountain bikers looking to extend their riding season. Images of mountain bikers amidst spectacular desert backdrops began appearing in outdoor and mountain bike magazines, and riders flocked to the area. These images of Moab helped define and fuel interest in the sport throughout the 1980s.

The proximity to Canyonlands National Park, the favorable climate and general small town ambience were important features, but it was the Slickrock Trail that made the town famous. The BLM estimated that use of the Slickrock Trail increased from 1000 riders in 1983 to approximately 103,000 in 1994. This figure had increased to 120,000 by 1998. A 1997 study estimated the value of the Slickrock Trail alone at \$8.5 million. People visiting Moab from other countries often ride few other trails while in the area.



The staying power of Moab's "icon" reputation is impressive. Riders from all over the world continue to come despite the fact that the state's Travel Division, the Moab Chamber of Commerce and Moab Travel Council do not actively market to mountain bikers (aside from featuring the sport in websites and visitor guides).

Indeed, there are fears among mountain bike operators in the area that Moab has coasted on this reputation for too long, and is in fact failing to provide a world-class

experience for today's market. The Moab Trails Alliance was formed in 2003 by a group of concerned citizens and businesses who recognized that the single greatest threat to Moab's destination reputation lies in what the area lacks: abundant singletrack.

- West Virginia

West Virginia has long been a prized riding destination for mountain bikers in the eastern United States, but its reputation for excellent, technical, single-track riding has gone international in recent years. IMBA recently awarded the state the highest grade as a riding destination in its 2004 report card. This recognition comes as a result of coordinated efforts at both the community and state levels.

Outdoor recreation is the cornerstone of West Virginia tourism. Situated within a day's drive of 60% of the U.S. population and 80% percent forested, the state appeals to city dwellers looking to escape the urban jungle. Mountain biking has become one of the pillars of the "Best in the East" outdoor recreation profile that the state lures tourists with.

West Virginia had built a strong foundation in high-profile mountain bike events and a reputation for abundant technical singletrack. Snowshoe Mountain Resort has been a major stop on the NORBA circuit since the early 1990s. The West Virginia Fat Tire Festival has been drawing people to the now famous Slatyfork area of the state since 1985. The state also started the 24 Hours racing phenomenon with its extremely popular 24 Hours of Canaan in 1993.

The state government wasn't content to stop there, however. The West Virginia Division of Tourism takes a particularly pro-active position with respect to mountain bike tourism, dedicating a staff person solely to attracting cycle-related tourism to the state. The state has taken a number of measures to attract mountain bikers, including stationing booths at industry trade shows and expositions, as well as the major cycling events held within the state. The state used to advertise in national publications like Mountain Bike magazine, but now targets regional outdoors and mountain bike publications.

The state has also maximized its exposure using mountain bike athletes. When the Outdoor Life Network covered the local NORBA race, the state paid for an in-show feature on a West Virginian national level racer who promoted riding opportunities in the state. The Division of Tourism also sponsored a national team athlete for several years, during which the state's excellent riding was frequently highlighted in media interviews and coverage.

This support for mountain biking extends to the highest levels of political organization in the state. At the 10th anniversary of the 24 Hours of Canaan (now Snowshoe) in 2001, the Governor himself officially started the race. This laid the foundation for the West Virginia legislature to pass a resolution calling on the Governor to recognize June of each year as Mountain Bike Month in West Virginia.

While the state has not conducted an economic impact study specific to mountain biking, the strategy seems to be working. The most recent visitor profile survey undertaken by the Tourism Division found that the top three activities for tourists after visiting friends and relatives, shopping, and dining were sightseeing, visiting state parks, and hiking/mountain biking. Over 15% of visitors choose hiking/mountain biking as an activity while in West Virginia.

- Wales and Scotland

In the mid-1990s, rural economies in Wales were struggling. Wales had already experienced some growth in cycle tourism, but singletrack was a virtually non-existent. Much of the forested land was under the control of the UK Forestry Commission. The south of Scotland was much the same: struggling rural areas, large tracts of forested land sitting idle, and very little singletrack.

Dafydd David, a park ranger with the Wales Forestry Commission, was tasked with increasing the number of recreational visits to the Coed y Brenin area in northern Wales. A former mountain bike racer, David recognized the potential value of singletrack. With a small grant, he gathered a crew of volunteers and built three trails. Mountain bikers started arriving soon thereafter.

As the number of mountain bike visitors steadily grew, the Forestry Commission decided that mountain biking was an ideal fit for their objectives of supporting rural communities, boosting local tourism, encouraging resident health and wellness, and maximizing the value of forests. The Mountain Bike Wales Project was launched with a combination of private and public funding. A total of seven mountain bike centres were built in Wales, each featuring a variety of rated trails and a central “hub” with a cafeteria, bike rentals, showers, etc.

The 7Stanes project in south Scotland followed closely behind with the construction of 7 centres and over 140 kilometres of singletrack. The national and regional tourism bodies were active partners in the both projects.

Rider visits to both the 7Stanes and Mountain Bike Wales centres have increased steadily each year. Wales mountain bike visits were recorded at 133,000 in 2003. Visits to the Glentress centre in Scotland alone rose an impressive 90,000 to a total of 252,000 between 2003 and 2004.

A study conducted at five of the Wales centres found that 41% of visitors resided in the local area, 24% were “day-trippers”, and 35% were on extended holidays. The majority of visitors were from England. Rider surveys showed that holiday-makers spent an average of £39 per day during their visit. The expenditure for day-trippers was less than half of this.

Trails for Tourism Initiatives

Cape Breton – Enterprise Cape Breton Corporation has developed an extensive “Trails for Tourism” strategy for the area. The goal of the strategy is to enhance Cape Breton’s trail product through investments in new trails, upgrading of existing trails, signage, trailhead facilities, and marketing. It estimates that the strategy will result in an additional 40,000 person visits and incremental spending of \$2.7 million annually.

Queenstown, NZ – Queenstown markets itself as a premier adventure destination, but its trail network is considered inferior to those found in other parts of New Zealand. The Wakatipu Trails Trust was formed and is working on a 5-8 year plan to create a world-class network of non-motorized trails for biking, hiking, and horseback riding. The Wakatipu Trail Strategy includes a coordinated marketing strategy to attract international visitors to the area for trails-based recreation.

Park City, UT – In the mid-1990s, development in this small Utah town started heating up. A committed group of individuals recognized the importance of preserving trails and natural spaces in Park City and formed the Mountain Trails Foundation. Working with private landowners, county and city governments, and community members, the MTF set out to establish a major network of non-motorized singletrack trails. Today, Park City often hosts national and international mountain bike events, and regularly ranks as one of America’s top mountain bike destinations.

Sources: Wakatipu Trails Trust, Sports Guide, Economic Planning Group of Canada

The estimated economic impact of mountain biking in Wales has been estimated at £3.3 million. The economic benefit to South Scotland has been estimated at £2.99 million, with an additional £3.56 million impact to Scotland. The Scotland Forestry Commission estimates that when all seven centres are operational, the 7Stanes Project could inject as much as £6 million into the Scottish economy annually.

Scotland isn't just stopping at the 7Stanes Project, however. It has also pursued mountain bike tourism dollars by bidding on and winning the rights to host international mountain bike events. Fort William, a town of about 11,000 people located in the western Highlands of Scotland, played host to the first UCI World Cup events ever to be held in the UK in 2002-2004, and recently secured the coveted UCI World Championships in 2007.

The majority of the estimated £600,000 impact of the 2002 World Cup was attributed to spending by the 8,000 plus spectators and 2,000 competitors, media and officials who attended the event. Over 700 competitors and 40,000 spectators are expected in 2007, with a projected economic impact of £2 million. Significant levels of international media coverage, including live terrestrial broadcast, are also expected at the event.

- Fruita, Colorado

Fruita, located in southwestern Colorado approximately 1.5 hours east of Moab, found itself on the verge of bankruptcy in the early 1990s. A long-distance trail called the Kokopelli connected Fruita to Moab, but there was very little else to hold mountain bikers in the area. Enter Troy Rarick, newly retired from the corporate sector of the bike



industry and looking for a challenge. He saw the mountain biking potential that lay in Fruita and proceeded to renovate a derelict building on the main street and open up a bike shop. For several years, he and a dedicated crew of local volunteers built trail at an almost dizzying pace.

With all this singletrack built, Troy needed to get the word out to the mountain biking masses. Using a combination of ingenuity

and contacts from his time in the bike industry, he offered free tours to the mountain bike media and lobbied the local government and industry hard to support his initiative. He eventually raised enough money from Fruita businesses to advertise the first Fruita Fat Tire Festival in 1995 in BIKE magazine. Today, the festival is attended by about 800 people and brings in an estimated \$1.5 million (US) annually. Mountain biking is estimated to generate about \$4 million (US) in commercial revenues for the town each year.

Fruita is now recognized as one of the premiere mountain biking destinations in the world. From the very beginning, Fruita was intended to be what Moab is not. Most notably, Fruita's claim to fame is its quality singletrack. Fruita also takes pride in its

quiet, “off-the-beaten-path”, small town atmosphere. Mountain biking is a source of civic pride, with bike murals and sculptures adorning the main street in town. Troy has also tried to ensure that the economic benefits continue through consistent messaging about environmental impacts, and the responsibility of visitors and residents alike to “keep the singletrack single.”

Lessons from the Andes

Alistair Matthew is a New Zealand expatriate who virtually founded the mountain bike scene in Bolivia. Arriving in the late 1990s, he founded Gravity Assisted Mountain Biking and began offering riding adventures on old Inca trails and pathways. Despite considerable resistance from local authorities, Alistair managed to build his business and Bolivia's mountain biking reputation with media exposure, a good website, and recommendations in guidebooks.

Today, mountain bike tourism is alive and well in Bolivia, with about 25 companies employing an estimated 200 people. Alistair reports that the majority of his business is in the one-day trips down the “World's Most Dangerous Road”, a descent of 11,000 feet in 49 miles, and that many of his clients come to Bolivia because of the notorious reputation of this downhill ride.

Matthew would like to expand the multi-day trip component of his business, but faces several challenges in doing so. He believes that most Canadians and Americans are intimidated by Bolivia's reputation for physically demanding riding and are wary of negative press about safety standards in the country.

- Medora, North Dakota

Medora, North Dakota, population 100, is situated on the fringe of one of the least visited national parks in the United States, Theodore Roosevelt National Park. For years, equestrian rides in the park and a local musical production comprised the major tourist attractions to the area. Since 1999, the town has started to lure mountain bikers with its increasingly renowned Maah Daah Hey (MDH) Trail.

The MDH Trail came into being through a three-partner effort between the North Dakota State Park and Recreation, Theodore Roosevelt National Park and the United States Forest Service. Input on the development of the trail was sought from both equestrian and mountain bike users.

The result of this collaboration is a 96-mile long recreational trail, including six campgrounds, that winds its way through the rugged badlands and rolling prairies near Medora. The MDH is a non-motorized trail and is nationally recognized as a premier backpacking, mountain biking, and horseback riding trail. The Division of Tourism prominently features the trail in its website and promotes the trail in mountain bike magazines.

The trail has become such a draw for mountain bikers that the owner of the major bike shop in Bismarck is relocating his business to Medora and partnering with a major Nevada tour company to offer guided tours along the trail. Western Spirit Cycling Adventures of Moab also offers tours every week from June to mid-September.

- British Columbia

As the birthplace of freeriding, British Columbia has a world-wide reputation for technical, challenging mountain biking. BC and its resident celebrity riders receive ubiquitous coverage in mountain bike films and magazines. The Whistler Mountain Bike Park sets global trends for style and product delivery in the sport. To put it mildly, the future looks bright. As one operator commented, “I think that our province is on the cusp of becoming known as mountain biking's nucleus – where Moab used to be the center.”

Mountain biking evolved at a very grassroots level, with trail builders and riders in various parts of the province working independently to develop riding opportunities around their communities. The abundance of quality riding is almost overwhelming. Most destinations are known for their freeriding, particularly North Vancouver, Squamish, Whistler, Vancouver, Kamloops, the Okanagan, Nelson, Williams Lake, and Rossland. The Southern Chilcotins attract mountain bikers with the lure of fly-in wilderness cross-country epic rides.

Marketing and promotion for mountain biking have been almost entirely industry driven. Some municipalities invest in their trail product, however. Rossland hires a full-time trail builder during the summer to ensure that its self-proclaimed title of the “Mountain Bike Capital of Canada” holds credibility. Despite the abundance of riding opportunities at the Whistler Mountain Bike Park, the Resort Municipality of Whistler (RMOW) employs a sizable trails crew to help build and maintain quality trails for all interests and abilities. Last year, the RMOW even provided funding and support to a Whistler-area trail builder to help him complete a signature 25 kilometre technical cross-country trail, “Comfortably Numb”.

So just who is BC’s global reputation attracting? Mike Brcic of Fernie Fat Tire Adventures reported that his client base is 50% US origin, 30% Canada, and 20% Europe. Clients of Bush Pilot Biking in North Vancouver are primarily from the UK, Germany, USA, Canada, and Japan. (Owner Johnny Smoke commented that the European market was especially “hot”.) Big Mountain Bike Adventures of Whistler reported that its clients are 60% US origin, and 35% Canada. While all operators reported that their clients are intermediate to advanced riders, the difficulty of many BC trails can pose challenges. As Chris Winter of Big Mountain Bike Adventures noted, “Whistler is popular but the riding is generally too technical to guide most riders.”

Lessons for Aspiring Destinations

1. Destination image persists, so make sure it’s positive.

As the example of Moab illustrates, even a single trail can create a destination image that has the power to lure visitors for many years.

Destination image is formed first by the accumulation of mental images about a place. Moab and British Columbia capitalized heavily on the power of photography and media in developing icon destination images in the minds of a global audience.

The second step in image formation is information gathering. West Virginia made sure that this information was transmitted successfully to a regional and national audience through its marketing efforts.

Image has the power to both help and hurt destinations. The example of Bolivia tells us that “exotic” destinations in particular can be threatened by visitor misconceptions. BC’s image as the freeriding mecca could be a stumbling block in attracting less experienced or cross-country riders. In designing marketing strategies, destination images need to be evaluated on their strengths, weaknesses, accuracies and inaccuracies and effectively addressed in promotional strategies.

2. A reputation is based more on substance than style.

Destination reputation and word of mouth are the most important factors influencing the travel choices of destination mountain bikers. The quality of trail infrastructure and scenery are the most important attributes of a destination. Mountain bikers show a high willingness to pay in destinations that can deliver these fundamental amenities.

The creation of a destination reputation relies on the initial discovery of a place by core enthusiasts (or “explorers”) and their subsequent word of mouth advertising. Moab and British Columbia were both discovered by such explorers. Their destination reputations grew quickly, first within the core mountain biking community, and subsequently the broader market of adventure travelers.

Catering to the requirements of core enthusiasts thus ensures that subsequent larger segments of the adventure travel market will follow in their footsteps. The challenge lies in achieving a level of growth and development that ensures a viable industry but doesn’t dissuade the enthusiasts from making repeat visits or providing positive word of mouth advertising.

3. Small is beautiful.

Mountain biking can thrive and become a major economic contributor in smaller centres. West Virginia, Wales and Scotland used their “smallness” to their advantage in marketing to large urban populations seeking an escape from city life. Fruita uses its size to great advantage, providing visitors with personalized service and small town hospitality.

The example of Fort William, Scotland also shows that small size, relative remoteness, and lack of a major airport need not prevent a destination from attracting major international competitions and reaping significant economic benefits.

4. Partnerships and politics produce results.

Partnerships, both at the community and higher political levels, can help mountain bike tourism enormously. Wales had a champion in Dafydd Davis, but his vision would have never materialized without funding and political support from partners. The example of Fruita illustrates the importance of building support and partnerships in the local business community. The Resort Municipality of Whistler recognized the importance of partnering with local trail builders to ensure that their trail product stays cutting edge.

West Virginia worked on partnerships at the state level, combining government marketing power with the volunteer efforts of the mountain bike community to create and promote a strong calendar of mountain bike events. The political support of the Governor leaves a lasting impression with mountain bikers’ that the state is very keen to play host to them.

5. Build it and they will come.

The stories of Wales, Scotland, and Medora show that investments in purpose-built singletrack for mountain bikers tend to pay off. British Columbia and Fruita possess a valuable tourism product due to the efforts of independent trail builders.

The Medora and British Columbia experiences would indicate that mountain bikers are willing to travel a significant distance for quality riding experiences. This bodes well particularly well for destinations that lack the advantage of close proximity to major markets. So long as a market-responsive destination image can be developed and the trail and scenery attributes meet visitor expectations, a region will be able to attract mountain bikers.

In determining what or where to build, a potential destination needs to look closely at its existing trail infrastructure and its terrain and scenic resources, and determine how these can be combined or enhanced to create a trail product that meets market expectations.

6. Create an experience, and make it unique.

Differentiation from competitors is an essential component of destination positioning. Fruita lured some of Moab's market with quality technical singletrack. West Virginia positioned itself as a forested oasis for city dwellers, where even the Governor himself was welcoming to mountain bikers. BC stands out as the global hub of freeriding. Medora created a long-distance wilderness experience in a distinctly unique landscape.

The local culture, while not easily defined, is important. Fruita plays up its small town charm and quirky local characters and traditions. Whistler, with its legions of armoured riders on downhill bikes, is a genuine cultural experience for visiting mountain bikers. Local culture, mountain bike-related or not, can be a useful way to differentiate a destination.

For operator Chris Winter, culture is a major criteria in searching out new mountain bike destinations to base high-end tours from. "I look for...generally unique destinations – great riding is paramount, but unique culture makes a trip really special."

8. Numbers do count.

Destinations such as BC and Moab do not actively monitor mountain bike visits or expenditures. As a result, mountain bike tourism tends to fly under the political radar. Wales and Scotland, where mountain bike tourism was a planned initiative, were careful to create mechanisms for ongoing monitoring and data collection. This information has been critical in building support for large initiatives such as the Fort William World Championships.

Numbers not only help build the business case for mountain bike and trails-based tourism, they also serve to inform and direct marketing efforts. They can also prove to be useful in evaluating the potential value of competing land or recreational uses in an area.

Part IV. The Yukon Context

In April 2004, the Yukon Department of Tourism and Culture released its Tourism Marketing Strategic Plan and Marketing Plan for the 2004-2007 timeframe. These documents set out the broad strategic priorities and goals for tourism in the territory, and provide a set of initiatives and programs to implement this vision.

In February 2005, a small representative group of Yukon tourism stakeholders and mountain bikers was invited to a facilitated session to discuss the development of a Yukon mountain bike tourism industry. Participants were asked to identify the territory's strengths, weaknesses, opportunities, and challenges in developing such an industry, and provide recommendations for moving forward. The group also worked to develop a preliminary vision for the industry.

The work of Yukon Tourism and the focus group provides part of the broader context in which the prospect of Yukon mountain bike tourism is discussed in the following section.

Target Demographics and Markets

While the majority of Yukon visitors are Alaska-bound motorcoach or RV visitors originating in the US, the territorial government and local tourism operators are increasingly trying to attract European, Canadian, and Australian markets who are more apt to visit the Yukon exclusively and spend money while here.

After the US, the next five most common countries of origin for visitors to the Yukon are Canada, Germany, United Kingdom, Switzerland, and Australia. These countries boast some of the largest per capita populations of mountain bikers in the world. The Yukon could have a distinct advantage in attracting mountain bikers from these target geographic markets given the existing levels of interest in the territory already.

In marketing to mountain bikers, the territory would be reaching out to a constituency that shares many of the characteristics of its target demographic markets. Mountain bikers' high levels of disposable income and education and willingness to pay for world-class riding experiences would indicate that the higher cost of visiting the Yukon would not be a strong disincentive as long as the experience met with the expectations for a riding destination.

Scenery, Wilderness and Terrain

The Yukon holds significant scenic values for both residents and visitors alike, and has a wide variety of landscapes to showcase. These qualities could help position the Yukon as a premier mountain bike destination. Variety of terrain and scenery are key attributes mountain bikers seek out in a riding location, and backcountry biking in exotic, wilderness locations will be a strong niche segment in the future.

The Yukon's terrain varies widely and could potentially support a variety of different trail experiences, from limestone and tundra trails in the high alpine to well-worn clay riverbank paths. The terrain ideally lends itself to the development of moderately

difficult cross-country trails. The potential combination of wilderness singletrack and astounding scenery would be unique in the world and would cater to riders of all abilities. As Chris Winter explains, “an expert will have as much fun as an intermediate on a buffed and flowing trail, where only the expert would enjoy a technical trail.”



Wilderness is not enough, however. Access to wilderness is key. Future challenges lie in attracting visitors to wilderness areas while ensuring that environmental and cultural values are upheld. Additionally, issues of logistics and safety will need to be overcome. Educating tourists about bears and wildlife will be important, as will be the development of infrastructure to support wilderness-based mountain bike tripping.

Local Values and Capacity

Local values and capacity must be recognized in determining how mountain bike tourism should proceed. The Yukon is a relatively small market. Existing trails are highly valued and frequently used by Yukoners, and their enjoyment of the trail resource must not be compromised.

The focus group stressed the importance of managing growth and development on local terms in order to ensure maximum

benefits for Yukoners. The group borrowed a simple statement to communicate this: “Attract the right people to the right places in the right numbers with the right expectations.”

This statement speaks to a small-to- medium scale industry that would provide quality, high-end riding experiences in keeping with local interests. Development should proceed in a manner that allows the Yukon to deliver on the promise of an authentic, world-class wilderness adventure.

The focus group also recognized the limited capacity of the mountain bike community to follow through on many initiatives in the absence of on-going coordination and funding.

Road and Trail Network

The number and variety of singletrack trails in an area is of primary importance for destination mountain bikers. The Yukon has an extensive network of doubletrack in the form of old tote trails and roads. Singletrack is abundant in the Whitehorse area, but less so in the other communities.

The opportunity to ride excellent singletrack trails in a unique wilderness environment is an experience that few destinations can offer. In particular, it is an experience that could help the Yukon distinguish itself from nearby competing mountain bike destinations such as Whistler. The group envisioned building on this existing network of trails and tracks to provide the best singletrack cycling opportunities in the world.

The Yukon has some significant advantages with respect to its trail infrastructure. The relatively dry, arid climate typical of most regions minimizes erosion and weathering. Yukon soils are ideal building materials, compacting well due to their high clay and silt content. As evidenced by many of the old trails surrounding Whitehorse and other communities, Yukon trails withstand the tests of time and frequent use. These advantages suggest two key points:

1. The costs and logistical challenges of developing or reclaiming trail infrastructure would be relatively low compared to other jurisdictions.
2. Assuming that trails receive at least a moderate level of use, trail maintenance requirements are likely to be minor.

The focus group envisioned a trail system that could provide a variety of experiences for a variety of users. The Whitehorse-area network of singletrack is an excellent resource, but fails to meet the criteria of user-friendliness. Signage and user-friendly maps are the keys to unlocking the full economic potential of a trail system.

The development of more singletrack infrastructure in the territory could provide opportunities that extend far beyond mountain biking. A network of wilderness trails linking historic and present day communities could be enjoyed by a variety of non-motorized users, including hikers and equestrians. The expansion of the existing singletrack trail network throughout the Yukon, particularly if supported by a hut-to-hut system, could generate an entirely new market for Yukon wilderness tourism operators on a year-round basis. The potential economic impacts of such an initiative could be substantial, given the high participation rates in “softer” activities such as hiking and horseback riding within the global adventure travel market.

Land Use Issues

The territory’s land administration regime has changed in recent years with the settlement of most Yukon First Nation Land Claims and new socioeconomic assessment legislation pending. These changes will impact on the development of mountain bike tourism in several ways. The issues and obligations associated with for-profit use of trails must be addressed early-on. The focus group also felt that a process for minimizing potential land use conflicts from trails projects may need to be clarified or developed. Liability is another issue that will need to be clearly understood and addressed in trails projects.

Culture, Heritage and Health

Trails were traditionally of great importance to Yukon First Nations as travel, trade, and hunting corridors. At one time, an extensive network of trails connected First Nation settlements throughout the Yukon, northern BC, and Alaska. These trails also served early explorers, prospectors, and other newcomers. The construction of the Yukon

highways system and accompanying shift in travel patterns led to the abandonment of many of these trails.

The potential value and importance of reconnecting Yukoners to this trail heritage was a strong theme that emerged from the focus group. The group felt that mountain bike tourism could draw on and respect local history, traditions, and culture, and hold significant interpretive and cultural tourism potential for Yukon First Nations.

Supporting the health and positive lifestyles of Yukon individuals and communities was equally important to the focus group. The international success of youth programs such as Sprockids indicates that mountain biking could provide focus and recreation for many Yukon youth, particularly those at-risk. One could envision a territorial mountain biking program modeled after the Territorial Experimental Ski Training (TEST) initiative.

Wilderness Tourism Industry

The Yukon is home to an active wilderness tourism industry, estimated at approximately 120 companies in 2002. The industry's economic contribution was estimated at approximately \$26 million per year in a study commissioned by the Wilderness Tourism Association of Yukon (WTAY).

Many existing Yukon operators provide services that could be easily adapted to the needs of mountain bikers. Existing products or packages could be expanded to facilitate either day trips or multi-day package tours.

It is important to note that increased mountain bike tourism is unlikely to divert business from other sectors of the Yukon wilderness tourism industry. Mountain bikers show a strong dedication and preference for the sport and are apt to plan riding-specific holidays. As such, the Yukon would be catering to a niche segment of the adventure market that is largely untapped at present.

Events

There are numerous mountain bike events held in Whitehorse each summer. The 24 Hours of Light, held the last weekend on June each year, is the largest. The race has grown steadily in its four year run, attracting about 135 people in 2004. Smaller recreational races hosted by the VeloNorth cycling club attract a small but loyal following throughout the summer. These existing events could be developed and expanded to attract more people from Outside. They could also be marketed in complement with other cycling events such as the Kluane to Chilkat International Bike Relay and the Tour of Whitehorse weekend-long road race event.

Whitehorse is well positioned to host a Canada Cup mountain bike race and has been encouraged by Canadian Cycling Association officials to submit a bid. Experience in hosting a Canada Cup level event could help the Yukon attract larger UCI events.

In the last ten years, the success of events such as the Dyea to Dawson race, Raid the North Extreme, and Yukon River Marathon Race have highlighted the strong potential for adventure-based events in the Yukon. The popularity of multi-day stage races and long-distance "epics", combined with the strong adventure appeal of the North, would

suggest that the Yukon could succeed in hosting an international caliber mountain bike event.

Support Services

While the “frontier” and undeveloped qualities of the Yukon could potentially be its greatest assets in attracting destination mountain bikers, there needs to be an adequate level of support services and amenities to meet the needs of the market. These would include:

- bike “friendly” accommodations with secure bike storage
- well signed trail systems and user friendly guides and maps
- quality bike shops and rental services
- local guides

Low-to-mid-budget accommodations, including campgrounds, cabins, hostels, and lodges, will appeal to many independent travelers. The existing network of bed and breakfasts and hostels in the Yukon would be well positioned to attract mountain biker business with some effort made to facilitate bike storage/washing needs.

Existing publications such as the Whitehorse Area Hikes and Bikes guide are an excellent resource for leisure-oriented cyclists but are limited for more experienced riders seeking singletrack and technical riding. The complexity and size of the Whitehorse trail system poses particular challenges. Signage would greatly assist riders in conjunction with user friendly maps and/or area-specific guides. One exciting initiative in this direction is

XYukon, an online Yukon mountain bike ride guide created by local rider Geof Harries.



Professional, reliable bike shop and repair services exist in Whitehorse year-round (and Dawson in the summer). As of summer 2005, there will be a limited number of mountain bikes available for rent in Whitehorse and Carcross through local tour operators.

Developing a group of skilled and professional mountain bike guides should not be difficult. In most

jurisdictions, guides work without any specific training beyond safety oriented courses such as Wilderness First Aid, etc. Ideally, local guides should be skilled and enthusiastic leaders and instructors. In this respect, programs such as the Canadian Mountainbike Instructor Certification based out of Vancouver or the CCA’s coaching programs may be of interest to would-be guides or local operators.

Access to Markets

The considerable distance between the Yukon and major urban centres makes highway access a largely unviable option for the majority of potential destination mountain bikers. Accordingly, reliable and convenient air access is key to the success of a mountain bike tourism industry here.

Whitehorse has an international airport that is serviced daily by direct flights from Vancouver, and twice weekly from Calgary and Edmonton. Summer charter flights from Zurich and Frankfurt further increase access to European markets.

One existing challenge is the inability of the Air Canada planes servicing Whitehorse to take bicycles as cargo. However, this situation also poses significant opportunities for Air North to target mountain bikers.

The highway and Alaska ferry system provides the Yukon with convenient access to other potential markets. Alaska-bound visitors could be enticed to stop in the Yukon to “stretch their legs out” and go for a ride. Anchorage, Fairbanks, and Juneau have active mountain bike populations and (reportedly) limited singletrack opportunities. The Yukon could market shorter mountain biking trips to Alaskans, as well as entice Alaskans in highway transit to spend the night and go for a ride. While the size and potential economic contributions of this market are small, the potential for repeat visits is high.

Local and International Profile

While the Yukon may have achieved a reputation as a wilderness destination in some tourism markets, its reputation for mountain biking is relatively weak. Developing a Yukon mountain bike industry will depend in large part on increasing the profile of the sport both within the territory and in target geographic markets.

Mountain biking’s profile is low in the Yukon tourism and business community, as well as within governments. The focus group recognized that overcoming this profile problem will depend initially on “champions” in the mountain bike community. The focus group recognized that mountain biking will have to compete for limited resources with other niche tourism products. Emphasizing the business case for mountain bike tourism will be especially important in this respect.

Timing will be key. As word of mouth is so critical, marketing efforts must not precede the territory’s “readiness” to accommodate destination mountain bikers. The Yukon’s profile should develop at a pace that allows the trails product and support services to meet visitor expectations. Given the media exposure of recent years, these initiatives would ideally be underway at present.

In developing its destination reputation, the Yukon will need to speak directly to common misconceptions that potential visitors may have about the territory, specifically climate, length of riding season, and wildlife dangers. It will be even more critical to build a destination image in US and international markets that clearly distinguishes the Yukon riding experience from the competing product in BC.

Partnerships

Partnering will be paramount if a Yukon mountain bike tourism industry is to be realized. Working with compatible partners will help to overcome the challenges of funding and capacity within the mountain bike community. Potential partners could include:

- recreation and sporting associations
- tourism and business associations
- the wilderness tourism industry
- municipal, territorial, and First Nations governments
- community associations
- schools and youth groups
- non-affiliated groups with compatible interests

Mount Sima and Mt. McIntyre are examples of existing recreation facilities that could potentially partner in mountain bike tourism related projects. Entities such as the Recreation and Parks Association of Yukon could benefit. Non-affiliated groups such as backcountry skiers may have compatible interests with the mountain bike community.

Potential Economic Impacts

Estimating the potential economic impacts of Yukon mountain bike tourism at this preliminary stage is challenging in many respects. Most significantly, there is little visitor or economic impact information available from destinations with similar attributes and marketing challenges.

The following section makes use of the best available information to provide economic impact estimates for the following: a Canada Cup mountain bike race, an international multi-day mountain bike event, and the mountain bike travelers that could be anticipated if the Yukon were to position itself as a global destination.

The estimates are based in part on data and information contained in other reports and studies, including the 1999 Whitehorse Air Travellers Survey and the 2000 Arctic Winter Games Economic Impact Statement. The Yukon Department of Economic Development's Economic Impact Estimator was also used. More detailed background information and calculations are provided in Appendix A.

- Canada Cup Mountain Bike Race

If Whitehorse were to host a 2008 Canada Cup mountain bike race, approximately 250 competitors, training staff, officials, and friends/family from Outside would be expected. Assuming Outside visitors stay in the territory for an average of 4.5 days, total per-visitor expenditures would be \$1070. Using the Yukon Government's Economic Impact Estimator, the total visitor expenditure of \$277,500 would result in a total economic impact of \$354,637. Please refer to Table 3.

Expenditures	GDP	Wages/ Salaries	FTE Positions	Output
\$277,500	\$178,230	\$109,315	4	\$354,637

Table 3. Indirect and Induced Impact of a Canada Cup on the Yukon Economy

It should be noted that this estimate is based solely on visitor expenditures, and does not account for any spending injections from Outside sponsors or the national sport governing body. As such, this estimate could be considered low.

- International Mountain Bike Event

If a world-class multi-day mountain bike event were to be staged in the Yukon, it may attract about 250 competitors and 125 “others” (friends/family, media, support, etc.) from outside the territory. Assuming that a \$400 registration fee is charged for a 4-day event, and that all visitors (competitors and non-competitors) stay in the Yukon for an average of 7 days, the total visitor expenditures would be approximately \$456,660. Using a 1.28 spending multiplier, this would result in a total economic impact of approximately \$584,525. Please refer to Table 4.

Race Spending	Air Travel	Non-Race Spending	Total Expenditures	Output
\$125,000	\$116,160	\$215,500	\$456,660	\$584,525

Table 4. Estimated Economic Impact of a Multi-Day Event on the Yukon Economy

Again, this estimate does not account for expenditures made with funding or sponsorships originating from outside the territory, resulting in a low estimate.

- Destination Mountain Biker Visits

In 1998, the Whitehorse Air Travellers Survey determined that 8% of visitors departing by air from the Yukon participated in mountain biking during their visit, representing approximately 1800 people. This participation happened in the absence of any concerted effort on the part of government or the wilderness tourism industry to attract mountain bikers.

If trail infrastructure, marketing, and product development evolved to the point of positioning the Yukon as a global mountain bike destination, a significant increase in participation over 1998 levels would be expected. A 250% increase in the annual number of visitors mountain biking, or about 4500 people, would be a realistic target.

What do 4500 people per year actually represent in terms of visitation at established mountain biking destinations? This figure would comprise the following:

- 2% of Whistler Mountain Bike Park’s projected visits in 2008;
- 3.8% of estimated visits to Moab’s Slickrock Trail in 1998;
- 1.8% of visits to Scotland’s Glentress mountain bike centre in 2003; and,
- 3.4% of mountain bike visits to Wales in 2003.

To place this estimate within the broader global potential mountain biking destination market, 4500 people represents the following:

- 0.028% of the potential destination mountain bikers in six of Yukon’s key geographic markets: US, Canada, UK, Germany, Austria, and Switzerland. In other words, 2.8 out of every 10,000 potential destination mountain bikers in these six countries would visit the Yukon to mountain bike.

Assuming these 4500 visitors spend \$100/day and stay in the territory an average of 8 days, the total visitor expenditure would be approximately \$4.5 million. Using an economic multiplier of 1.28, the potential annual economic impact of this spending on the Yukon economy would be approximately \$5.76 million. Please refer to Table 5.

Air Travel Expenditure	Non-Air Travel Expenditures	Total Expenditures	Output
\$900,000	\$3,600,000	\$4,500,000	\$5,760,000

Table 5. Estimated Impact of Destination Mountain Biking on the Yukon Economy

This estimate may be low for several reasons:

- The global destination mountain biking market is expected to grow beyond current levels;
- The 1999 Air Travellers Survey found that visitors stayed in the territory an average of 11.2 days;
- Mountain bikers are willing to spend in the range of \$250-300/day for all-inclusive mountain bike experiences in other established destinations; and,
- A 2003 study found that Yukon wilderness tourists spent an average of \$195/day on a summer package tour, and that they spent an average of \$1000 in the territory in addition to their package.

This \$5.76 million economic impact relates to increased mountain bike visits only. It must be emphasized that an investment in wilderness singletrack infrastructure would greatly enhance the Yukon’s appeal to other segments of the adventure travel market. Given the very high levels of interest and participation in hiking alone within the “softer” adventure travel market, it would not be unrealistic to anticipate that the potential total annual economic impact of such improvements would increase to at least \$10 million.

Part V. Conclusion and Recommendations

The popularity of mountain biking worldwide, the demographics and riding patterns of its core participants, and the high percentage of mountain bikers who travel indicate that mountain bike tourism is a global niche market with strong potential for growth. Emerging trends in the sport suggest that overall participation in the sport will continue to increase and that mountain bikers will seek out more exotic, wilderness-based riding experiences in the future.

With its unsurpassed scenic and wilderness attributes and existing trail infrastructure, the Yukon is clearly positioned to become a mountain bike destination. The Yukon's broader target demographics and geographic markets correspond highly with those of mountain bikers.

Mountain bike tourism presents opportunities for destination tourism in the various regions of the Yukon and would attract a distinct niche adventure market segment whose needs would be compatible with the territory's wilderness tourism industry.



In order to differentiate from global competitors, meet future demand, and maximize existing

assets, the Yukon should strive to offer the best wilderness-based singletrack cycling in the world. Meeting this objective will require an expansion of the existing road and trail network to provide increased singletrack trail access into wilderness areas in the territory.

An improved wilderness trail network would create year-round recreation, interpretive and business opportunities for Yukoners. It would also serve Yukon Tourism's goal of positioning the territory as the number one wilderness destination in North America by ensuring that the territory's singletrack trail product meets world-class standards for a discriminating global adventure travel market with strong interests in trail-supported activities such as hiking and horseback riding.

The existing singletrack infrastructure of Whitehorse is a valuable resource to develop and market in the short term. The availability of user friendly signage, guides, and trail maps are current challenges to overcome. A trails "readiness" template developed for Whitehorse could be adopted by other interested communities. The trails and facilities in the capital region are conducive to hosting a Canada Cup mountain bike race. An Olympic qualifying race in 2008 would attract a maximum number of competitors and

provide sufficient time for the development of supporting Yukon mountain bike marketing initiatives.

The Yukon has further challenges to overcome in developing mountain bike tourism. There may be a shortage of low/mid-budget accommodation providers that can cater to bikers. The limited capacity of the mountain biking community will require that it pursue partnerships as a means of making progress. In the short-term, raising the profile of mountain biking in the larger Yukon community will be a strategic priority.

The Yukon should proceed with marketing in a way that allows sufficient time for the trails product and support services to develop to meet market expectations. The Yukon's destination mountain bike image should reflect the Yukon's unique culture and wilderness and set the tone for an industry that provides quality experiences for a variety of clients.

Many of the following recommendations are broad in scope, setting out a strategic framework for the development of a mountain bike tourism industry. The inherent assumption is that tourism operators will anticipate delivery gaps and develop market-ready products and services to dovetail with community or regional level initiatives. They are as follows:

Short Term:

1. Establish a working group to develop a more detailed vision and action plan for Yukon mountain bike tourism.
2. Initiate the process of educating the tourism, business, and First Nation communities about the market potential for Yukon mountain bike tourism.
3. Initiate discussions with the City of Whitehorse to develop a signage scheme to assist mountain bike tourists.
4. Identify potential partners and resources required to host a Canada Cup race in preparation for preparing a bid to host an event in 2008. (Note: the Canadian Cycling Association will host its Annual General Meeting in Whitehorse in fall 2005).
5. Identify the funding and organizational structures required to realize the above stated goals.

Medium Term (2-4 years):

6. Develop a simple user-friendly guide or brochure detailing mountain bike rides, businesses, and services in Whitehorse, including maps tied to trail signage initiatives.
7. Undertake a pilot project in partnership with a Yukon community, including trail signage and building initiatives and a recreational program for youth.
8. Undertake a feasibility study for the creation of a long-distance non-motorized trail network in the Yukon, identifying strategic locations, potential project partners and funding.
9. Develop initiatives to support a 2008 Canada Cup race (assuming a bid is successful) and maximize its promotional and marketing potential for Yukon mountain bike tourism.
10. Develop a mountain bike-specific destination positioning and marketing plan in partnership with Yukon Tourism and the wilderness tourism industry.

Long Term (5+ years):

11. Work with interested Yukon communities to enhance the economic and recreational benefits of singletrack trails.
12. Develop a long-distance wilderness trail network in strategic areas of the Yukon to facilitate major events and enhance trails-based and year-round tourism opportunities.
13. Stage a world-class mountain bike event to enhance the Yukon's mountain bike destination image.

List of Contacts

The following individuals provided information or assistance during the course of this project. Where their business or affiliation does not indicate their location, it is provided.

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Appendix A. Economic Impact Estimates: Background Information

Canada Cup Mountain Bike Race

The following information was considered in determining the potential economic impact of a 2008 Canada Cup:

- Canada Cup races held closer to major centres attract between 200-300 people;
- The 1998/1999 Canada Cup races in Rocky Mountain House attracted approximately 2.5 additional visitors per competitor; and,
- Races take place over a weekend but most competitors arrive a minimum of one day in advance to pre-ride the course, rest, etc.

The following assumptions were then built into the economic impact estimate:

- Given the additional expense of traveling to the Yukon, about 125 Outside competitors and one additional visitor per competitor would be expected in an Olympic qualifying year;
- Per-day spending on retail, entertainment, and food by athletes, officials, and other visitors would likely approximate that of officials at the 2000 Arctic Winter Games;
- A larger size rental vehicle would be rented for every four Outside visitors;
- Air North would be the only air carrier able to transport bicycles in 2008;
- Accommodations would be shared by most visitors (two people to a room); and,
- Most competitors and officials would arrive on a Thursday and leave either on a Monday or Tuesday.

Per-Visitor Spending Estimate

Accommodation	\$202.50	(\$90/night x 4.5 nights ÷ 2 people)
Food	\$160	(\$36/day)
Air Travel	\$400	(Air North return ticket)
Ground Transport	\$102.50	(\$330 for 4 day mini-van rental + \$80 in gas ÷ 4 people)
Retail	\$145	(.66 of AWG officials' retail expenditure)
Entertainment	\$80	(AWG entertainment expenditure)
TOTAL	\$1090	

International Mountain Bike Event

The following information was considered in determining the potential economic impact of an international multi-day mountain bike race/event:

- 3-4 day events in "exotic" destinations such as Tasmania and Costa Rica attract approximately 350 competitors;
- The price for the 7-day TransRockies Challenge is \$1350/competitor and the price for the 3-day Ruta de los Conquistadores is \$650;
- Many competitors travel to competitions with family, friends, or other support; and,
- Air travelers to the Yukon spent an average of \$91/day in 1999; and,

- A 1.28 economic multiplier was estimated for the 2000 Arctic Winter Games.

The following assumptions were then built into the economic impact estimate:

- If the Yukon were to offer a longer-duration world-class event at a competitive price, it would attract about 250 people from Outside;
- A competitive price would be approximately \$500 for a 4-day event;
- Due to the higher travel costs, only .75 additional visitors (media, spectators, support, etc.) would attend for every competitor;
- Both competitors and non-competitors would spend an average of 7 days total in the Yukon to maximize the value of their airfare;
- Non-competitors would spend approximately \$100/day while in the territory;
- Competitors would spend approximately \$110/day during their three non-racing days in the Yukon; and,
- Only two-thirds of competitors would fly Air North since many competitors could access the Yukon through European charter flights.

Competitor Spending Estimate

Race Fees	\$125,000	(\$500 x 250)
Air Travel	\$66,000	(\$400 x 0.66 x 250)
Non-Competition	<u>\$82,500</u>	(\$110/day x 3 days x 250)
TOTAL	\$273,500	

Non-Competitor Spending Estimate

Air Travel	\$50,160	(.66 x \$400 x 190)
Non-Competition	<u>\$133,000</u>	(\$100/day x 7 days x 190)
TOTAL	\$183,160	

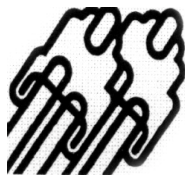
Destination Mountain Biker Visits

The following information was considered in determining the potential economic impact of destination mountain bikers for the Yukon economy:

- The total estimated number of people who mountain bike regularly in the US, Canada, UK, Germany, Switzerland, and Austria is approximately 18.8 million;
- The economic multiplier used for the 2000 AWG was 1.28;
- US destination mountain bikers reported spending an average of 4.6 days on trips; and,
- Air travelers to the Yukon spent an average of \$91/day in 1999.

The following assumptions were then built into the economic impact estimate:

- Approximately 85% of regular mountain bikers in Yukon's key geographic markets would be potential destination mountain bikers (based on IMBA survey);
- Per-day spending for mountain bikers would likely be more than the 1999 average;
- Destination mountain bikers would spend a longer period of time in the Yukon given the high air travel cost; and,
- Another air carrier regularly servicing Whitehorse in the 5-10 year timeframe would be able to transport bicycles and 50% of mountain bikers would fly Air North.



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