Tourism Opportunity Analysis Adventure/Extreme Adventure Tourism in the Grande Cache Region

PREPARED FOR:

Alberta Economic Development

PREPARED BY:

Kalahari Management Inc.
New World Expeditions
Pam Wight and Associates

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Executive Summary

Grande Cache, located in a spectacular mountain setting, offers opportunities for a wide range of adventure tourism activities. Tourism has existed in this community for many years but recently, more effort has been made to develop the region as a destination for adventure and extreme adventure tourists.

A Tourism Operators Association has been formed, a marketing plan developed in conjunction with Travel Alberta, and work started on a Trails Project (to improve awareness of existing trails and access to recreational resources). The operators association has been tireless in its efforts to promote tourism in the area, and the Trails Working Group has contributed significant time to their mapping activities. Grande Cache hosted the Canadian Death Race Run in 2000, an extreme adventure event that was very successful as a special event, attracting athletes and media attention from around the world.

In early 2001, a tourism opportunity analysis study was undertaken to determine what resources exist, or can be developed, to support adventure/extreme adventure tourism products, and what the market potential is for adventure products within the region. An assessment of adventure tourism viability was felt to be a valuable step in sharing information on the possible opportunities for future growth of adventure tourism.

The study consisted of a review of secondary market research, directed interviews with representatives from tourism recreation associations and inbound tour operators, a site visit to assess product quality and potential, and interviews with community members.

The secondary market research yielded some generalizations about characteristics and preferences of adventure travelers. The most important are:

- Adventure travelers tend to be 25-55 years old although there are significant numbers of soft adventure travelers who are 55+.
- Males and females are generally well represented with participation varying by activity. Those activities that are more strenuous tend to attract younger, male travelers.
- Most are married and will travel with their spouse or friends.
- Adventure travelers are well educated, often having graduate or undergraduate degrees.
- Income for these travelers is higher than average and many come from professional or managerial occupations.
- They often live in urban areas.
- Most popular activities with this group are hiking, camping, rafting, wildlife viewing, cycling, canoeing and educational tours.
- Accommodation preferences range from tents to hotels, B&Bs, cabins and lodges.
- Reasons for taking an adventure travel vacation revolve around the natural environment i.e. seeing it, experiencing it, having adventures, being away from crowds and civilization, and personal growth through education or challenging activity.
- A destination is chosen most often for the scenery, the presence of certain physical features like lakes or rivers, or the opportunity for new experiences.

Information from the directed interviews yielded similar preferences for outdoor recreationists:

- In a travel experience, outdoor recreationists look for:
  - unique experiences and places
  - the chance to do or go someplace “new”
  - scenery
  - challenge
  - some infrastructure
  - affordable cost
- An attractive destination is one that provides:
  - good services/facilities (do not have to be fancy)
  - a variety of terrain with beginner to advanced levels of difficulty for recreational activities e.g. hiking, biking
  - natural resources such as wildlife, mountains
- Accommodation preferences are for:
  - Clean rooms
  - Affordable
  - Tented camps (especially if fixed roof is not possible)
  - Hot water for showers, potable water for drinking
- Remoteness or perceived remoteness is important to many adventure travelers
- Scenery is very important
- Outdoor recreationists are willing to travel between 4 to 8 hours from a major airport

Grande Cache would appear to offer many of the activities and settings that adventure travelers have indicated as desirable, or that influence their destination selection, and is well positioned to capture their business. Specifically, Grande Cache possesses:

- an extremely attractive physical setting
- a protected area that:
  - supports a healthy ecosystem
  - will not be given over to other uses, thus providing stability for tour operators
- diverse wildlife populations
- trails for hiking, biking, trail riding and cross-country skiing at a variety of skill levels and trip lengths
- rivers for rafting, canoeing, and kayaking at a variety of skill levels
- accommodation suitable for adventure travelers
- an established group of adventure tour operators
- a large, well-placed visitor information centre with full time staff
- a successful special event that has gained recognition internationally
- a location that is 2.4 hours from an international destination (i.e. Jasper National Park) and on one of the shortest, most scenic routes to Alaska

It would appear at first glance, that certain market segments, i.e. organized bus tours, would not be a good market match with Grande Cache’s existing product base, as its hotels are not 3 star and it is over 4 hours to a major airport. However there may be opportunities that have been overlooked. Although Grande Cache is too far from a major airport for these clients, there are significant numbers of people in Jasper (slightly over 2 hours drive away) who could be bused to uncrowded Grande Cache on a day trip, to participate in adventure or cultural experiences. Some skill development is required, but the culture of the Aseniwuche Winewak Nation could form the basis for an aboriginal tourism product that would appeal to a wide range of market segments.

Many of the tourism businesses in Grande Cache, with the exclusion of accommodation providers, are currently running at a low capacity, usually around 30%. However they do demonstrate the ability to deliver a world-class product as a slightly larger number (51%) of their customers are coming from other parts of North America or overseas, and a large percentage of these people (68%) came specifically for the adventure activity (Ference Weicker, 2000).

The success of Death Race Run 2000 has provided a signature event for the community to rally around, and has provided increased confidence around community ability to become a well-known adventure destination. Plans are underway to expand the Death Race events with Death Ride (mountain biking) and Death Snowshoe competitions. This series of events represents significant potential to Grande Cache for increasing its destination awareness, and in stimulating growth in adventure tourism products and services.

Based upon the study findings, it appears that Grande Cache contains many of the elements needed for an adventure tourism destination, and that the market characteristics and potential size could provide for a viable product/market match. It is difficult to estimate the potential market size for the study region, although research would indicate that adventure travel is a large market, and Canada as a country has considerable untapped potential in the adventure travel marketplace. Determining Grande Cache's potential market size as a destination will depend upon a number of factors such as:

- success in marketing
- ability to deliver consistent, quality adventure experiences
- effect of multiple activities being developed simultaneously
- competition from other destinations with similar products
- global economic forces e.g. strength of Canadian dollar, levels of disposable income, etc.

However, for Grande Cache to develop successfully, and to realize this market potential, it will need to resolve a number of issues, including capacity development, potential conflicts with multiple land use as utilization increases, and a lack of destination awareness.

Grande Cache currently has a wide range of adventure products, such as, rafting, hiking, trail riding, kayaking, wildlife viewing, photography and snowmobiling. Many of these activities are available through tour operators or can be done on a self-guided basis, although equipment rentals are limited. Some activities such as trail riding, are provided by a number of operators, others, like hiking, are offered by only one company. With the market potential that exists, the attractiveness of the activities and the setting, there are many opportunities to increase capacity with appropriate product and market development.

Accommodation is adequate by adventure travel standards, although at times, fully booked. Concerns have been expressed about the quantity and range of accommodation available, but experience shows that the adventure traveler is by nature, more flexible in accepting lower quality supporting facilities if the core experience is unique or well delivered. Thus, the structure currently exists to compete as an adventure destination but there may be opportunities for future development.

Presently, no major conflicts have been noted between tourists, or between tourism activities and industrial users, e.g. forestry. As growth continues, it is likely that problems will arise between users as their activities bring them into greater contact. Communities in similar situations have found that success as a tourism destination depends heavily upon active stakeholder participation in land use planning. Grande Cache may benefit from a similar process.

Grande Cache must also deal with its lack of name recognition among adventure tourists. This can be done by increasing those marketing activities that promote Grande Cache as a destination that offers a whole range of adventure products in one scenic setting, or a chance to experience the undiscovered. It is important to convey the sense of challenge and unique experience available in Grande Cache. It may also be helpful to include the affordable nature of many of its experiences in marketing messages. This process **has** been started already; the Grande Cache 2001 marketing plan includes an agreement and commitment to market the community as one "offering personalized outdoor experiences in an unspoiled, uncrowded Rocky Mountain Setting".

As one of the less-known regions of the Canadian Rockies, Grande Cache will need to establish a competitive advantage over its better-known neighbors, such as Jasper National Park and town-site. Grande Cache can compete by promoting its ability to offer a wide range of activities in a wilderness setting, and with some product development, offer experiences not found in the Mountain Parks, for example, viewing of dinosaur tracks, or visits to aboriginal settlements. Grande Cache provides a wilderness experience that is no longer common in Canada's popular national parks, and some of the adventure activities such as whitewater rafting, provide a more challenging experience, and offer more spectacular scenery than that found on rafting trips in the Jasper area.

Implementation strategies have been identified which focus on product development, resource management, community involvement and market development. They represent the areas where effort is needed to improve the Grande Cache adventure tourism base. Product-specific strategies that relate to rafting/kayaking, hiking, trail riding, fishing, wildlife viewing, and special events have also been provided.

Overall, Grande Cache meets the criteria of a viable adventure/extreme adventure destination. It possesses the core elements needed to offer an adventure product and in sufficient size to establish itself as a destination for the adventure seeker. Its successful development will require tour providers, in conjunction with other stakeholders, to address the issues surrounding potential future conflicts with multiple land uses, and to increase the destination awareness through effective market development.

1.0 Introduction

1.1 Study Purpose

The purpose of this study was to determine the capacity to develop adventure or extreme adventure tourism in the Grande Cache region. Some success has been enjoyed to date in attracting adventure tourism clientele.

To meet the overall study objectives, goals were set. They were:

- to determine what resources exist or can be developed to support tourism activities
- to assess market potential for adventure products in the Grande Cache area
- to identify tourism products most suited for the resource base and with the greatest market potential
- to provide a critical assessment of adventure tourism viability in the area
- to determine the level of tourism stakeholder support for adventure tourism activities
- to provide an implementation plan for the development, marketing and evaluation of tourism products

1.2 Background

The focus of this study was to determine the existing capacity and future potential for adventure or extreme adventure travel in Grand Cache. It is important that a common understanding for what constitutes adventure travel exists. A relatively simple definition is provided by Darst &Armstrong (1980), whereby adventure travel is "all pursuits that provide an inherently meaningful human experience that is related directly to a particular outdoor environment – air, water, hills, mountains".

This is a very broad definition and can cover a range of experiences. The types of activities that are commonly provided by organized and commercial operators, and that can be considered under the adventure travel category (Sung et al 1996) are shown below.

Most Commonly Provided Outdoor Adventure Travel Activities		
Arctic trips	Backpacking	Ballooning
Bicycling	Bird watching	Bungee jumping
Camping	Canoeing	Diving (scuba, sky)
Dog sledding	Fishing	Four wheel drive trips
Hang gliding	Hiking	Horseback riding
Hunting	Jungle exploring	Kayaking
Motorcycling	Mountain biking	Mountain climbing
Nature trips	Orienteering	Paragliding
Rafting	Rappelling	Rogaining
Safaris	Sailing	Snorkeling
Skiing	Snowshoeing	Snowmobiling
Skydiving	Spelunking	Survival & wilderness training
Soaring	Walking tours	Windsurfing
Trekking		

With the wide range of activities, it is not surprising that adventure tourism is one of the largest sectors of the tourism industry and is showing some of the highest rates of growth. The Travel Industry Association of America 1997 study of adventure travel shows that one in two Americans is an adventure traveler and spends $820 to $1,275US on an adventure vacation. Adventure tourism encompasses people with a broad range of abilities and interests. Some, such as bird watching, require little physical exertion or conditioning, and expose people to limited risk. These are considered to be "soft" adventure products and have the largest market size as their appeal crosses all age groups and backgrounds. Other types of adventure tourism experiences, often labeled "hard" adventure, need some degree of physical conditioning and technical skill. They are accompanied by managed, but real risks to the participant. Examples of these activities might be whitewater kayaking or mountaineering.

In recent years, there has been an expansion to the adventure travel market with the advent of extreme adventure events. This type of product usually involves a combination of sports such as hiking, rafting, climbing, biking, kayaking, or orienteering, done in challenging physical environments with time constraints. Appealing to both men and women, participants can compete individually or as members of a team. Extreme adventure events gained international recognition with the launch of the Mark Burnett's EcoChallenge event in Whistler, B.C. in 1996. Now several hundred extreme adventure events are being held each year around North America.

1.3 Overview of Grande Cache Region

Grande Cache is located on the edge of the Willmore Wilderness Park in western Alberta. It sits at an altitude of approximately 1,240 meters and is surrounded by a vista of nearly two dozen mountain peaks. The area around the town is rich in natural resources such as timber, coal, and oil and gas. The "New Town of Grande Cache" was established in 1969 to support coal mining.

Willmore Wilderness Park from Sulphur Gates

Located approximately 150 kilometers northwest of Hinton and 180 kilometers south of Grande Prairie, Grande Cache is home to approximately 4,400 residents. Historically, coal mining has been the major employer in the town. At its peak, 1200 people worked at the Smoky River Coal mine. With the softening of world coal prices and other factors, the mine suffered a number of setbacks. In March 2000, the mine was closed. Interest has been expressed in re-establishing coal mining within the former mine site.

Other forms of economic activity in Grande Cache have been forestry and employment at a minimum-security correctional facility. Weyerhaeuser Canada operates a sawmill with an annual capacity of 109 million board feet, and has an extensive Forest Management Area (FMA) south and north of the Grande Cache region. Other FMAs within the area include Weldwood of Canada Ltd. and ANC Timber Ltd. The correctional facility has been a major employer in the area, although the change from medium to minimum security in 1999 resulted in the loss of 100 positions.

Oil and gas activity in the area has increased in the last year due to high prices for oil and natural gas. This has resulted in tremendous increases in hotel occupancy and has been a positive influence overall on the economy.

In recent years, Grande Cache has positioned its community as a desirable retirement location especially for "early actives", those retirees who are young in spirit and interested in outdoor recreation. Affordable rent, community size, the friendly spirit and varied recreation opportunities have been successful in attracting two hundred seniors as new residents.

Tourism has been a part of Grande Cache for many years although at a small scale and occurring mainly in the summer season. The oldest forms of tourism are the horse outfitters who have been taking hunters into the Willmore Wilderness Park. Regional visitors from Grande Prairie, Hinton and Edmonton, come for fishing, snowmobiling and camping.

In 1996, Highway 40 to Grande Prairie was paved, completing one of the shortest and most scenic routes to Alaska. This has resulted in increased visitation at local campgrounds; however little organized effort has been made to capitalize on this market. Adventure tourism in Grande Cache is a growing part of the tourism industry and has become an important part of its tourism base. Several tour operators offer hiking, rafting, riding and ATV opportunities and in 2000, the first extreme adventure event, The Canadian Death Run was held. This event was extremely successful and resulted in regional, national and some international media coverage. Another Death Race Run is planned for 2001 along with a Death Ride (mountain biking) and in 2002 a winter event, the Canadian Death Snowshoe.

Grande Cache has been active in developing their tourism industry. The potential to expand Grande Cache as a center for tourism activities was recently examined *(Ference Weicker, 2000).* Members of the tourism industry have recently formed a Grande Cache Tourism Operators Association and been active in developing a marketing plan with Travel Alberta. A Trails project is underway as well. A Trails Working Group has put considerable effort has been put into upgrading the recreational-use maps for the area.

1.4 Method of Study

The tourism opportunity analysis was based on the following components:

1. <u>A Review of Existing Market Research</u>

Research studies done in the area of adventure or specialty travel were reviewed and results relevant to Grande Cache examined to estimate the potential market characteristics and size of the adventure market. Surveys from Canada and the U.S. were the main focus. Previous studies by Alberta Economic Development (AED) on the Grande Cache area were also reviewed for estimates of market potential. As extreme adventure is a relatively new entrant to the tourism market, secondary research focused on adventure and hard adventure products and markets.

2. A Selective Telephone Survey of Adventure Tourism Associations and Established Adventure Tour Operators Across North America

Given the regional nature of the study and the interest in extreme adventure products, the secondary market research was supplemented with a telephone interview of leaders of outdoor recreation associations and major tour operators who deal in adventure tourism. Established Canadian inbound receptives were included in this group.

A survey was developed and used for the basis of the telephone calls. This form of directed questioning resulted in interviews with 10 participants. Results of the survey and the are summarized in Section 3.2 and the survey itself is in Appendix B.

3. A Site Survey of the Physical Geography, Tourism Operations, and Infrastructure Available in the Grande Cache Area

Previous studies of the Grande Cache area were reviewed to determine what work had been done on resource inventories. As well, a 9-day site survey of the Grande Cache area was done to assess the existing and potential adventure tourism products.

AED provided a listing of the tour operators who reside in or around the area, and contact information. Major adventure operators and tourism service providers were visited to determine the type and quality of product offered and considered against similar products of national or international quality. For those business owners not in the area during the winter, attempts were made to call them for their input.

Possible positioning strategies for the community to use in marketing and product development were identified along with ways to distinguish themselves from other Rocky Mountain destinations.

4. Discussions of tourism opportunities and challenges with major stakeholders in the Grande Cache area to determine the level of community support

During the site survey, informal meetings were held with members of the local community most affected by tourism. Interviews were conducted with:

- tourism providers who were not members of the tourism association
- town administration managers
- one town councilor
- representatives from Alberta Sustainable Resource Development
- the President of the Aseniwuche Winewak Nation
- two representatives from Weyerhaeuser Canada
- a representative of the Chamber of Commerce
- the Canadian Rockies TDR (Tourism Destination Region)
- the Jasper Tourism and Commerce DMO (Destination Marketing Organization)

Information was sought on existing or potential resource conflicts if adventure or extreme adventure tourism activities were expanded in the area. Their opinions on the challenges and opportunities facing their businesses and the community were also gathered. Issues from the Ference Weicker & Company study were raised with the objective of determining the community's ability and willingness to solve the problems identified. Specific information sought during each interview revolved around:

- *The perception of needs existing in the tourism marketplace but not being met*
- *Those tourism needs being met by the community*
- *Community receptiveness to alternative methods of providing tourism facilities*
- *The level of financing that may be available for tourism development*
- *The skill level of entrepreneurs, guides and hospitality workers for serving the adventure market.*
- *Which marketing partnerships exist, those tried and unsuccessful, and those sought in the future*
- *What barriers they see to tourism development and their recommendations for dealing with them.*

Given the limited project budget, it was not possible to develop a process to build community support for adventure/extreme adventure tourism, thus the current levels of support were assessed informally.

Results of these meetings are summarized in section 2.3.

5. Assessment of Tourism Viability

Based upon the market research information gathered, the site survey results and the experience of the project team, the viability of adventure or extreme adventure tourism in the Grande Cache area was assessed. This was done primarily in the context of market viability by sector (e.g. whitewater rafting, cross-country skiing, etc) but also looked at issues related to the physical environment, and regulatory or policy constraints. As adventure tourism encompasses a wide range of products and markets, the specific areas where Grande Cache can be most successful are the focus of the recommendations.

The assessment looked at the existing level and quality of tourism development as well as future potential. Emphasis was given to developing options that would provide more opportunities for extended stays, i.e. keeping tourists in the community longer, or attracting tourists with multi-day packages.

In order to update the participants in the process and to gather feedback, an informal presentation was made to the stakeholders on February 27 in Grande Cache. The intent was to provide an update and discussion session with the people involved in the site survey and community interviews.

6. Development of Implementation Strategy

If it was determined that a viable product base existed or could be created, a development strategy was to be formulated. The focus was to be on product development and marketing, and identifying steps needed for tour operators, the local DMO and the community at large. Implementation strategies were assigned short, medium and long-term timeframes, and an order of magnitude (using a high-level dollar estimate) for the strategy provided where reasonable. The costing is provided to set the strategies in context, but is not intended to replace detailed market or business planning processes needed by the community or individual organizations.

7. Report Preparation

This report was developed to summarize the market research, site observations and community discussions. Findings and assessments of the project team along with their recommended strategies were compiled and summarized. Examples of successful practices and techniques, where they existed, were highlighted along with lessons from communities facing similar losses of traditional economic drivers.

Two maps of the area are included:

- one, illustrating existing adventure/extreme adventure tourism products, facilities and associated infrastructure
- two, illustrating areas where possible opportunities exist, based upon the study findings and implementation plan.

2.0 Adventure Tourism/ Extreme Adventure

2.1 Situation Analysis and Resource Inventory

An inventory was compiled of the natural and man-made features of the Grande Cache area to facilitate tourism planning. This information was gathered from previous studies, tourism publications and the site visit. *(Alberta Tourism, Parks and Recreation, 1992, Ference, Weicker, 2000).*

The natural features of the Grande Cache area are summarized in Table 2.1.1. Upon reviewing the inventory, it is apparent that Grande Cache is endowed with a significant number of physical features that will hold appeal to travelers from regional to international markets. Many of these fall within the Willmore Wilderness Park, providing them with protection from development, although it does present some challenges in terms of access. As it is a wilderness area, signage is rudimentary, trail maintenance sporadic, and permanent structures and motorized transport (with the exception of trapping) forbidden. Rudimentary maps are available in the Grande Cache travel planner and the town provides a map to the network of easily accessible trails that surround the town-site. This natural area presents a tremendous resource base for adventure tourism as the variety of terrain and possible activities will satisfy people interested in hard and soft adventure.

Grande Cache's climate is one of cool winters and mild summers. Moderate precipitation occurs as rain (574mm average) and snow (278 cm average). It is located in a Chinook belt but has no frost-free period. The study area is rich in natural diversity. There are four representative environments, forest, shrubland, wetlands and alpine. As well, special features, such as springs, glaciers and cliffs are found.

Table 2.1.1 Physical Setting

Element	Comments
Significant Physical Attractions:	
Landforms:	
• Hell's Gate/Sulphur Gates	
• Dinosaur Tracks	18 sites containing tracks in 25 square kms
Biogeography:	
• Main Foothills	
• Subalpine	
• Alpine/Rocky Mountains	Rugged mountains and foothills, >100m of vertical relief
Waterfalls:	
• Twin Falls	½ - 1 hour round trip
• Eaton Creek Falls	2-3 hours round trip
• Muskeg Falls	1-2 hours round trip. Opportunity for angling
Rivers:	
• Smoky	Class 1,2,3+
• Sulphur	Class 2,3
• Jack Pine	Class 4,5+ (still unexplored)
• Muskeg	Class 3 to 5+/6
• Berland	Flatwater
• Wildhay	Class 1,2,3
• Sheep Creek	Class 3 to 5+/6
• Kakwa	Class 1 to 4+
Lakes/Beaches:	
Victor Lake	
Grande Cache Lake & Beach	
Peavine Lake	
Significant Biological Features:	
• Bighorn Sheep	Willmore has 20% of Alberta's Bighorn Sheep and Mountain goat population
• Mountain Goat	
• Elk	
• Wolves	
• Woodland Caribou *(COSEWIC species)*	600 (winter viewing in valley bottom)
• Grizzly Bears (COSEWIC species)	
• Mountain songbirds	127 neo-tropical species found in Alberta foothills
• Ptarmigan	
• Wildflower displays	
• Bull trout	
Protected Areas:	
Willmore Wilderness Park	4,600 square kms; no motorized vehicles
Sulphur Gates Public Recreation Area	

There have been few conflicts to date among visitors to the Willmore and the surrounding areas; this is possibly due to the low number of people visiting the area at this time and to some legislative barriers. In general, mechanized recreation use has been situated on the east side of Highway 40 and non-mechanized use within Willmore Wilderness Park to the west of Highway 40, thereby reducing conflicts.

With the wide range of activities that the environment supports, it is likely that increased conflict will occur as more people use the area. Some activities are compatible e.g. hiking and rafting, but where one use dominates an environment (such as with jet boating or hunting), other users are likely to perceive a conflict. At the present time, hunting season overlaps some of the best hiking months (e.g. prior to June 15 and after August 15). Although no problems have occurred to date, it would seem that the perceived or actual risks to hikers from hunters could negatively impact the attractiveness of some backcountry experiences in the future.

Other destination regions, for example, Elliot Lake, Ontario, have experienced considerable conflicts between motorized and non-motorized uses. In the Willmore Wilderness Park, motorized access is not allowed; people wanting to use motorized vehicles, such as snowmobiles or ATVs, use the areas north of Grande Cache or south of the Willmore. The logging roads make access into these areas easier and personal recreational use in permitted in the FMA (Forestry Management Area). This has provided a natural separation between the motorized and non-motorized users. Possible conflicts arising in the future will need to be addressed in planning for additional development.

Man-made resources were also inventoried and the results summarized in Table 2.1.2. Grande Cache as a destination appears to have the basic elements required of a tourism destination. Accommodation, restaurants, tour operators, and tourism infrastructure exist at a level that will meet the minimum needs from regional, national and international markets. There are opportunities for future development especially around the accommodation supply, but the structure currently exists to compete as an adventure destination.

Table 2.1.2
Tourism Facilities and Services

Facility/Service	Comments
Accommodation (see Appendix D)	
5 hotels, 1 apartment complex with rental suites (239 rooms some with kitchen facilities)	3 hotels currently meet standards necessary to serve international visitors; other upgrades underway.
2 B&Bs	
7 campgrounds (271sites, 85 fully serviced)	
Primitive cabins (6)	Hide A-Way camp
Backcountry cabins	Sheep Creek Backcountry Experiences Ltd.
Restaurants (13) (see Appendix D)	Cafes to full service restaurants
Tour Operators (9) (see Appendix D)	
Wild Blue Yonder	Rafting
U Bar Enterprises	Trail riding
Taste of Wilderness Tours	Guided hiking, backpacking trips, interpretative tours
Sheep Creek Backcountry Experiences Ltd.	Trail riding
Avalanche Adventure Tours	Jet boats
Pozzy's Paintballs	Paintballs
Smoky River Riding Stables	Trail riding
High Country Vacations	Trail riding, healing workshops
H& R Rentals	Snowmobile, ATV rentals
Hiking, Biking Trails	
750 km in Willmore several trails outside Willmore	Range of trip lengths from a few hours to several days with beginner to advanced levels of difficulty Trailheads difficult to find
Off Vehicle Trails	
Logging roads north of Grande Cache provide access to terrain suitable for snowmobiles, ATV, motorbikes, 4X4s	

Facility/Service	Comments
Equestrian Trails Numerous trails in Willmore Backcountry camps Cowlick Creek Staging area Sulphur Gates Staging area and campground	 Trails provide opportunities for rides of a few hours to a few days in duration
Cross Country Ski Trails Groomed trails – Pierre Gray's Lake Recreation area (15km); Marv Moore campground Ungroomed trails	 Range of terrain for beginner to intermediate skiers Snow conditions have been inconsistent in recent years
Cultural/Social Attractions: Canadian Death Race Canadian Death Ride Canadian Death Snowshoe (2002) River Rendezvous	 Extreme challenge –125 km of grueling mountain trails to be run or ridden Whitewater kayak, canoe, etc.
Interpretative Services: Grande Cache Tourism & Interpretive Centre One tour operator offering interpretative tours	 Displays depicting history, culture and wildlife of area. Offers guided tours; publishes maps, hiking guides
Equipment Rentals: ATVs Snowmobiles Fishing Biking Camping Kayaking Rafting Canoes Horses	 Available Available (discontinued in 2002) Available only with horse outfitters Not available Limited (from one operator in conjunction w. guided trips) Available under supervised conditions only Not available Limited rentals (2) at campground Available (guided)
Wildlife Viewing Sites: Caw Ridge Highway 40 Mt. Hamel	 Access is locked; difficult and lengthy drive Some interpretative signage for Caribou watching exists, guides needed Good location for spotting Mountain Goats
Shopping: Souvenir, craft stores (11) Grocery/convenience stores (5) Liquor stores (2)	 Selling souvenirs is not the main focus of these outlets; range of products is limited and could be expanded.
Transportation: Airport Bus service	 No scheduled service but airport long, paved with navigation aids, good terminal building
Search & Rescue: RCMP	Adequate resources exist for a search and rescue operation in Willmore. Access to helicopters may depend upon aircraft in the area.
Human Resources: Guides Hospitality staff	 Adequate number exists with appropriate technical, safety, first aid training Adequate staff available but may be opportunities for customer service training in ancillary services e.g. gas stations
Recreation Facilities: Akasaka Recreation Centre (pool, fitness center, curling rink, ice rink, tennis court, volleyball court) BMX track Soccer pitch Baseball diamonds (4) Grande Cache Lake Day Use Area Boat launches Golf Course Bowling	

As shown in Table 2.1.2, numerous trails exist within the Grande Cache region, and provide opportunities for short to longer-term duration experiences (e.g. one hour to several days) and levels of difficulty. Some trails are very accessible as they originate from within the Town corporate limits. Some hiking trails have been mapped and are included in Grande Cache's travel planner. A Trails Working Group has been established to map all trails within the Grande Cache area (e.g. hiking, equestrian, snowmobile, quad, etc

2.2. Summary of Site Inspections

During the course of the site visit, detailed personal and telephone interviews were conducted with 15 organizations involved in the Grande Cache tourism industry. They represented people from adventure tour operators, accommodation providers, restaurants, special event organizers, and the visitor information centre. Where time, geography and weather conditions permitted, staging areas and facilities were visited. In other cases, videos and photos were used and supplemented with verbal discussions. In the case of accommodation providers, room inspections were done where possible.

While the content of each inspection varied with the nature of the business, time available, and issues facing each person, base information was obtained around the areas of marketing, operations, staffing, risk management and management. Results from these site inspections are summarized in Table 4.1.1.

Key findings from the site inspections:

1. Most tourism products are at an adequate level for adventure travel. In the case of accommodation, it may be necessary to orient clients to their basic nature (i.e. no frills), but it is felt facilities will meet the needs of adventure travelers who are visiting the area for the main purpose of engaging in adventure activities. More detail is provided in Section 4.1.

2. Accommodation providers rely heavily on business travel and work crews to fill rooms. In the winter, most hotels are near 100% occupancy and can experience periods of high demand in the summer as well, if work crews are required for construction projects or major plant maintenance. Community representatives expressed concerns with obtaining hotel accommodation for sporting events during busy periods, and past studies had indicated that obtaining accommodation was a major concern for tour operators (Ference Weicker, 2000). However all hotel representatives interviewed said they would give the same priority to leisure travel as business, if deposits were made at the time of booking.

3. Most tourism businesses with the exclusion of accommodation providers, are running at a low capacity, usually around 30%. Many of the tour operators are running their tour business part-time and supplementing their income from other industries. This appears to be due to capacity issues i.e. not enough business. However, all interviewees expressed a desire to enter tourism full-time if the business could be developed to that level.

4. Most businesses have experienced an increase in business in the last twelve months and seem optimistic about the future. It would appear that the successful staging of the Death Race 2000 has provided a signature event for the community to rally around, and has provided increased confidence around community ability to become a well-known adventure destination.

2.3 Summary of Community Interviews

Interviews were conducted with some community residents impacted by tourism to solicit their input and concerns around possible expansion of adventure tourism in the Grande Cache region.

People were contacted from:

- town council
- town administrators (Town Administrator, Development/Planning Officer, Director of Recreation)
- the Aseniwuche Winewak Nation
- the Chamber of Commerce
- Alberta Sustainable Resource Development
- Weyerhaeuser Canada
- Akasaka recreation center manager
- retail store owners
- hotel and restaurant owner/managers who were not members of the tourism operators association

Most people seemed aware of the existing tourism development in Grande Cache, although there was considerable range in their understanding and support for a potential increase in adventure tourism. Most people were not aware of the size of the adventure tourism market and the full range of products available (for example, the expedition market or large scale rafting operations). Although all agreed Grande Cache had a tremendous setting and access to great natural resources, most were hesitant to endorse Grande Cache's ability to capitalize on the potential adventure tourism market. Concerns expressed during the meeting centered around their readiness to launch a marketing push, or uncertainties about whether the product would meet international standards.

The people interviewed were supportive of tourism, although some felt that the community as a whole might not be as supportive. Some of the concerns expressed were a fear that an increase in municipal taxes would be needed to cover increased tourism marketing costs, or that tourism could create unwanted changes to their lifestyle. When asked if tourism support was likely to evaporate if other forms of economic activity increased (such as a reopening of the mine), many felt that there would be a definite decrease. Others felt this may be offset by the confidence the community gained from its success in hosting the 2000 Death Race. Some people mentioned that tourism could be a positive factor for younger people in the community, since it could provide them with employment opportunities in Grande Cache after completing school.

Although earlier studies *(Ference Weicker, 2000)* had indicated that conflicts among resource users were a possible problem, few of the interviewees indicated a concern with user conflicts. There are concerns that there may have been some overgrazing on the East Side of the Willmore, but through the commercial licensing process, resource managers felt they could limit the number of horses in a particular area to an appropriate level. Existing resources that are available for resource management activities may not be sufficient if adventure tourism increases and reaches its potential.

The law requires that the public be granted access within FMAs for recreational use. Conflicts between recreational and industrial traffic on industrial roads can occur. The main forestry company in the area, Weyerhaeuser has not experienced difficulty with tourism users at this point, except for the occasional case of tourists using logging roads without care. Weyerhaeuser signs roads that have active logging trucks hauling at the entry point from Highway 40.

Weyerhaeuser has expressed some concerns around tourism growth where it would negatively impact their FMA either by a loss of tree growing capacity, or where their liability increases from greater numbers of people in an area. Concerns about tree growing capacity include a loss of land, as well as possible visitor expectations that existing 'pristine' viewsheds will not be harvested. Permanent tourism facilities or structures (say, a lodge or resort) planned for an area in Weyerhaeuser's FMA could impact tree growing capacity, so it is unlikely such tourism interests would be favorably received. Interest in temporary land uses (for example, crossing an area to put rafts in a river) may be more favorably received if there is no negative impact to the FMA. As Weyerhaeuser's main focus is forestry, it seems logical that they would prefer tourism be situated on lands outside their FMA, but they would review interests for tourism uses on a case by case basis.

Meetings with the Aseniwuche Winewak Nation indicated that they are interested in tourism development and would be willing to partner with other tourism businesses, if their community holds a meaningful position. Their interest includes, but is not limited to the selling of crafts, operating tours or working with existing tour operators. Some skill development is required but the culture of the Nation could form the basis for tourism products that would appeal to a wide range of market segments.

2.3.1 Interviews with Marketing Representatives

Prior to the site inspections in Grande Cache, interviews were conducted with the Tourism Destination marketing representative for the Canadian Rockies and with the Tourism Representative from Jasper. The intent was to determine the possible marketing partnerships open to Grande Cache. There has been some partnering with other mountain destinations through the Canadian Rockies TDR, most recently in the Canadian winter planner and event calendar. The focus of the Canadian Rockies TDR is on winter and shoulder season promotion, as many of the national park areas have very strong visitation in summer. This is a short-term problem for Grande Cache, as it is still building its summer market. The Canadian Rockies TDR has recognized this and encouraged Grande Cache to invest in its own summer marketing plans and use the TDR opportunities for products that fit into the winter or shoulder seasons.

Tourism organizations in Jasper have not yet partnered with Grande Cache on marketing, although there is a willingness to build such partnerships if there are common markets. There are many similarities in the types of adventure activities offered by the two destinations, but there is a need to increase the awareness with Jasper businesses of the facilities and experiences available in Grande Cache. Grande Cache provides a wilderness experience that is no longer common in Canada's popular national parks, and some of the adventure activities such as whitewater rafting, provide a more challenging experience, and offer more spectacular scenery than that found on rafting trips in the Jasper area.

Jasper represents one of the largest opportunities for Grande Cache, in terms of capturing international tourists. While the 4 to 5 hour drive from the Edmonton International to Grande Cache is perceived as a barrier for some tourists, it may be possible to convince people already in the Jasper area to visit. Grande Cache's strength comes from the range of adventure activities that they can offer. The 2.4 hour drive to Grande Cache is relatively short, and would allow people to participate in additional adventure experiences such as rafting. There are also other resources that are unique to Grande Cache, such as the Dinosaur track sites, and if developed, would be of interest to the Jasper market. Another potential attraction would be the aboriginal products, e.g. tours, arts, etc. that could be offered by the Aseniwuche Winewak nation.

2.4 Map of Existing Tourism Usage

See overleaf

3.0 Potential Markets

An important part of assessing the viability of Grande Cache was determining the market potential and requirements for adventure travel. Extensive secondary research of major tourism studies was conducted and is summarized in the Sections 3.1 and 3.3. Issues identified from previous studies in the area, for example, distance from a major airport and the quality of accommodation, was probed further in telephone interviews with a select group of inbound tour receptives and recreation associations. The results of those conversations are discussed in Section 3.2.

3.1 Findings From Secondary Market Research

Extensive surveys have been done on travel encompassing nature, culture and adventure experiences although few have been done at a national or international level. Where they have been undertaken, they were reviewed for information on the adventure traveler- who they are, what they like to do, how they make their travel decisions and their known preferences for accommodation. The detailed results of this review are provided in Appendix A, but a few generalizations can be made about adventure travelers, specifically:

- Adventure travelers tend to be 25-55 years old although there are significant numbers of soft adventure travelers who are 55+.
- Males and females are generally well represented with participation varying by activity. Those activities that are more strenuous tend to attract younger, male travelers.
- Most are married and will travel with their spouse or friends.
- Adventure travelers are well educated, often having graduate or undergraduate degrees.
- Income for these travelers is higher than average and many come from professional or managerial occupations.
- They often live in urban areas.
- Most popular activities with this group are hiking, camping, rafting, wildlife viewing, cycling, canoeing and educational tours.
- Accommodation preferences range from tents to hotels, B&Bs, cabins and lodges.
- Reasons for taking an adventure travel vacation revolve around the natural environment i.e. seeing it, experiencing it, having adventures, being away from crowds and civilization, and personal growth through education or challenging activity.
- A destination is chosen most often for the scenery, the presence of certain physical features like lakes or rivers, or the opportunity for new experiences.

Given the concern around whether Grande Cache accommodation is an appropriate match for adventure travelers, this area was examined in detail. Every study does not query accommodation preferences and where information was gathered it does not necessarily indicate a minimum level of hotel quality i.e. 3 star, etc. A major Canadian study on ecotourism and adventure travel (HLA/ARA, 1994) obtained differing results on accommodation preferences depending upon whether respondents were general travelers interested in nature/adventure/culture (contacted by telephone) or experienced ecotourists(contacted by mail). The general travelers specified hotels or motels as their preferred accommodation choice but also indicated a range of other types of accommodation, and were sufficiently flexible to select more than one type of accommodation per person. More experienced ecotourists selected a wider range of accommodation preferences, cabins, through huts, B&Bs, tents, etc. They chose an average of 3.5 types of accommodation each, indicating that accommodation is not a determinant of vacation.

The levels of luxury desired by the general travelers was mainly mid-level (60%), followed by budget (31%), then luxury (9%). Experienced ecotourists were also interested in mid-levels of luxury (56%), and many were also interested in budget accommodation (38%), and only a few preferred luxury (6%).

The survey of Northern Ontario ecotourists (Twynam & Robinson, 1997) may also have relevance to Grande Cache. This study included a mail survey to members of Mountain Equipment Coop and REI, both significant groups for outdoor recreationists and adventure travelers. The results showed a slight preference for tents over motels. If people were engaged in their adventure activity, the preference for tents was even higher. As these people were engaged in canoeing, hiking and wildlife viewing, the preference for accommodation they can take with them is explicable, but it illustrates that adventure travelers will accept basic accommodation in the pursuit of their main activity.

Further research was done on the activity preferences of adventure travelers to confirm that Grande Cache offers the types of experiences that will appeal to a wide range of adventure travelers and help them overlook accommodation deficiencies.

Trends in Specific Activities

The Specialty Travel Index (STI) is the only worldwide directory of special interest and adventure travel, and is directed toward travel professionals in the US. This publication was consulted to determine activity preferences from a supplier perspective. Shown below are the most popular types of travel, as indicated by listings in the STI. Tied scores are indicated in italics.

1991 Listings (203 total)	1996 Listings (271 total)
1. Hiking	1. SCUBA/Snorkeling
2. Educational	2. Cultural
3. Nature	3. Hiking
4. Yacht/sailing	4. Yacht/sailing
5. Trekking	5. Bicycling
6. Bicycling	6. Educational
7. SCUBA/Snorkeling	7. Nature
8. Camping	*8. Camping*
9. Fishing	*8. Walking Tours*
10. Cultural	9. Trekking
11. Photography	10. Fishing
12. Rafting	*11. Photography*
13. Cruises	*11. Ecotourism*
14. Safari/Game viewing	12. Rafting
14. Birdwatching	*13. Archaeology/History*
14. Archaeology/History	*13. Cruises*
15. Horse pack trips	14. Birdwatching
15. National Parks	*15. Horse pack trip*
16. Walking Tours	*15. Wildlife viewing*
17. Canoe/Kayak	*15. Safari/Game viewing*
18. Motorcoach	16. National Parks
19. Ecotourism	17. Canoe/Kayak

Wylie, 1997.

Grande Cache would appear to have a significant *competitive advantage* in the adventure travel market as it is currently able to offer at *least 10 activities from the above list and has the potential to offer several more.*

Research on Travel Providers

Further insight into the characteristics and motivations of adventure travel can be gained from the studies of Sung et al (1997). They took a more practical research approach by interviewing exhibitors at the International Adventure Travel and Outdoor Show in Rosemont, Illinois. Exhibitors are essentially those who are actively involved in the adventure travel industry, and are representative of adventure travel providers since it is one of the major trade shows of its kind in the world.

Her interviews focused on finding what travelers considered to be the major components defining adventure travel. A summary of the results are shown in Table 3.1.1. It would appear that:

- Activity is considered most important, together with experience and environment (Group A)
- Motivation is in the middle (Group B)
- Performance is seen as lowest in importance (Group C)

Table 3.1.1
Adventure Travel Providers' Opinions of Major Components Defining Adventure Travel

Component	Level of Importance* Tukey's Grouping						Mean Score	SD**
	1 (Most)	2	3	4	5 (Least)			
Activity (A)	127	48	0	3	0	178	1.3202	.5662
%	71.3%	27.0%	0.0%	1.7%	0.0%	100%		
Experience (A)	122	47	5	4	0	178	1.3876	.6563
%	68.5%	26.4%	2.8%	2.2%	0.0%	100%		
Environment (A)	117	53	3	3	2	178	1.4269	.7192
%	65.7%	29.8%	1.7%	1.7%	1.1%	100%		
Motivation (B)	69	94	12	2	1	178	1.7181	.6887
%	38.8%	52.8%	6.7%	1.1%	0.6%	100%		
Risk (C)	47	93	14	20	4	178	2.1067	.9942
%	26.4%	52.2%	7.9%	11.2%	2.3%	100%		
Performance (C)	42	85	20	30	1	178	2.23.3	1.0128
%	23.6%	47.8%	11.2%	16.9%	0.6%	100%		
Total*	524	420	54	62	8	1068		
%	**49.1%**	**39.3%**	**5.1%**	**5.8%**	**0.7%**	**100%**		

** 64% were tour operators/wholesalers; 27.5% were DMOs (Destination Marketing Organizations) or NTOs(National Tourism Organizations); 7.9% were adventure accommodation owners; 7.3% were manufacturers of equipment or supplies; and 5.6% provided guiding or instructional services (nb multiple responses)*
(Sung et al 1997)
*** SD - Standard deviation*

The same adventure travel providers were asked which were the most popular activities and products. The responses were:

Most Popular Package Adventure Travel Activities:

- 21.3% rafting
- 17.4% kayaking
- 15.2% hiking
- 14.0% trekking
- 12.4% ecotours
- 10.7% safaris
- 10.1% canoeing
- 8.4% wilderness trips

Most Popular Service-Oriented Adventure Travel Product:

- 23.6% multi-activity travel packages in exotic destinations
- 11.2% expertise leadership
- 7.3% customized trips for small groups
- 6.7% general information about the destination area

It should be noted that these results do not necessarily represent total market sizes, but the most popular activities/services that adventure providers have experienced.

Travel providers were also asked what percent adventure travelers were of their total clientele as some of the operators sell products other than adventure travel. The results were:

Proportion of Adventure Travelers in Total Clientele:

- 47.2% of providers said adventure travelers compose approximately 80% or higher, of their international business
- 36.5% of providers said adventure travelers compose 80% or more of their domestic travel business
- 43.8% of providers said adventure travelers generate 80% or more of their total business

Benefits of Adventure Travel

Tour operators were also asked what benefits travelers received from adventure travel. These findings are summarized in Table 3.1.2.

Table 3.1.2			
Benefits of Adventure Travel - Travelers			
	Frequency	**Percent**	**Sub total**
Experience			
Discovering new experiences	47	26.4%	
Increased sense of personal growth	45	25.3%	
Educational opportunities	13	7.3%	59.0%
Activity			
Fun and excitement	29	16.3%	
Integrated, better travel opportunities	28	15.7%	
Outdoor adventure activity participation	13	7.3%	
Recreational opportunity	5	2.8%	42.1%
Environment			
Improved interpretation of the environment and culture	30	16.9%	
Return to nature	13	7.3%	
Carefree, "blown away" setting	12	6.7%	
Interaction with environment/people	8	4.5%	
Misc.			35.4%
Improved awareness of physical fitness and health	5	2.8%	
Mental, physical stimulation	4	2.2%	
Do not know	26	14.6%	19.6%
Total (from multiple responses)	278		

(Sung et al, 1997)

In terms of future opportunities and marketing messages, Grande Cache might want to tap into those elements which adventure travel providers indicated were the greatest benefits to adventure travel markets and include those elements in promotional materials.

As well, tour providers were asked which words were most popular when describing adventure travel in marketing materials. The results are summarized below but it should be noted that the most popular words to describe adventure travel are 'Participation in physical activities'. This again confirms that activity is the most important component to describe adventure travel.

Travel Providers' Most Popular Words Describing Adventure Travel:

- 44.9% 'Participation in physical activities'
- 37.1% Out of the ordinary
- 32.0% Fun and excitement
- 30.9% Natural environment and resources
- 27.0% Outdoors and wilderness

The findings of this research suggest that the major components integrated into the adventure travel experience (activity, environment, experience, risk, motivation, and performance) carry different levels of importance in marketing messages and those images that focus on activity participation, fun or new experiences are likely to be most successful.

As a cautionary note, although risk is part of the experience, it should be carefully attached to product in the form of "perceived" risk, rather than to just the provision of a "dangerous, risky" setting.

3.1.1 Grande Cache - Secondary Market Research

Market research was done in 1999 on Grande Cache tourism (Ference Weicker, 2000). Interviews were done with people staying at the municipal campground to determine their level of satisfaction with Grande Cache, how they found out about the destination, their activities, and their motivations for traveling. The results were separated by country of origin, interviews with Americans staying at the campground are shown in Table 3.1.2.1, those with Canadians are shown in Table 3.1.2.2.

Table 3.1.2.1
INTERVIEWS WITH AMERICANS STAYING IN GRANDE CACHE

Study Area	American Visitors to Marv Moore Campground n=50
Method of awareness:	
Publications	36%
On the way to destination	32%
Word of Mouth	16%
Been before	8%
Map	4%
Other	8%
Overall Satisfaction:	
1 Not at all Satisfied	0%
2	0%
3 Somewhat Satisfied	4%
4	32%
5 Very Satisfied	64%
Overall Rating	4.6

(Ference Weicker & Company, 2000)

These interviews show that while a relatively large number of Americans (32%) came because Grande Cache was on the way to somewhere else, once they stopped they were very satisfied with the tourism experience. Although the study did not determine if they used adventure products, it is possible they could be interested in soft adventure products, such as interpretative talks or walks, or river floats. To increase the tourism activity in Grande Cache for this market, will require continued promotion to increase their awareness of Grande Cache as a desirable stopping point.

Table 3.1.2.2
INTERVIEWS WITH CANADIANS STAYING IN GRANDE CACHE

Survey Area	Canadian Visitors to Marv Moore Campground n=61
Purpose of Trip:	
Travelling to or from Alaska	6.6%
Travelling to or from other regions	49.2%
Participating in a circle tour	14.8%
Visiting friends or relatives in G.C.	16.4%
Travelling to GC for business	4.9%
Visiting G.C. as the principal destination	6.6%
Other	1.6%
Activities by Canadian Visitors:	
Hiking	18%
Golf	16.4%
Shopping	14.8%
Whitewater rafting	3.3%
Sightseeing	3.3%
Fishing	1.6%
Wildlife Viewing	1.6%
Biking	1.6%
Overall Satisfaction:	
1 Not at all Satisfied	0%
2	0%
3 Somewhat Satisfied	6.6%
4	36.1%
5 Very Satisfied	57.4%
Overall Rating	4.5

(Ference Weicker & Company, 2000)

Canadians interviewed during this study appeared mainly to be traveling within the region, either to other destinations or as part of the circle tour. These people did not appear to undertake many activities in the Grande Cache area, especially adventure sports, but roughly 20% did participate in hiking, whitewater rafting, or wildlife viewing. Again, the visitors rated their satisfaction with Grande Cache very highly.

Ference Weicker & Company also interviewed several adventure operators as part of the study, the results are summarized in Table 3.1.2.3. They found that that while local and regional visitors made up 49% of their customer base, a larger number (51%) were coming from other parts of North America or overseas. A large percentage of these people (68%) came specifically for the adventure activity. This could suggest a number of elements, including that:

- the visitors stopping at the campground are not a major market for adventure operators i.e. they are not interested in adventure activities, or
- the adventure products in Grande Cache have not been developed with that market in mind e.g. activities may be too long or scheduled at the wrong time of day for people in transit, or
- significant marketing efforts have not been made to inform these visitors about adventure opportunities in Grande Cache.

Discussions during the site inspections indicated that it is likely a combination of all three factors, however it would appear that insufficient product development and marketing are the major reasons this market has not been fully tapped as a source of adventure customers.

Table 3.1.2.3
INTERVIEWS WITH ADVENTURE OPERATORS IN GRANDE CACHE

Study Area	Outdoor Adventure Operators n=7
Customer Origin:	
Local	6%
Regional	43%
National	27%
US	16%
International	8%
Season of Visit:	
January to March	0%
April to June	27%
July to September	72%
October to December	1%
Reason for Visit:	
Travelling through by automobile	19%
Visiting friends and relatives	10%
Travelling to G.C. on business	3%
Visiting G.C. as primary destination	68%
Length of time in Business	13 years
Recent growth in revenues	30% over three years
Constraints to Development *(ranking in order of importance)*	
• Accommodation Base	
• Transportation Infrastructure	
• Government Regulations	
• Availability of Trained Workers	
• Land Use Issues	
• Access to Training	
• Management and Marketing Expertise	
• Access to Market Information	
• Access to Financing	

(Ference Weicker & Company, 2000)

The number of people actually undertaking adventure activities with Grande Cache operators has not been collected in the past. It may be desirable to undertake this in the future, to allow for extrapolation of potential market size.

3.2 Findings From Telephone Interviews

There were two main groups targeted during the telephone interview process, recreation associations and inbound tour receptives. Recreation associations were selected, as they represent large numbers of people who participate in outdoor recreation and adventure travel. Many of these people travel independently and as part of the FIT (fully independent travel) market were seen as a likely match for the Grande Cache product. Two representatives from the ski industry were included in the study group in order to reveal information about the supplementary activities of skiers, (i.e. will they undertake other winter sports while on a ski holiday and if so, what would they want), and to get an understanding of destination requirements from other potential markets, (e.g. telemarkers or heli-skiers).

The interview questions were designed to determine what motivates these people and what they looked for in a destination. As concerns had been raised earlier that Grande Cache accommodation was lacking in quality and availability, more information was sought around preferences in this area. Grande Cache's distance from a major airport, approximately a 4 to 5 hour drive, was also seen to be a possible limitation to adventure travel growth, so respondents were queried about the distance their member base would travel from the airport to a holiday destination.

As the physical setting of Grande Cache could be one of its competitive advantages, interviewees were also asked to rate remoteness and scenery as to their importance for recreation or travel experiences.

3.2.1 Findings From Recreation Associations

Copies of the survey questionnaire and the responses gathered, are shown in Appendix B; the main conclusions are as follows:

- In a travel experience, outdoor recreationists look for:
  - unique experiences and places
  - the chance to do or go someplace "new"
  - scenery
  - challenge
  - some infrastructure
  - affordable cost
- An attractive destination is one that provides:
  - good services/facilities (do not have to be fancy)
  - a variety of terrain with beginner to advanced levels of difficulty for recreational activities e.g. hiking, biking
  - natural resources such as wildlife, mountains
- Accommodation preferences are for:
  - Clean rooms
  - Affordable
  - Tented camps (especially if fixed roof is not possible)

    - Hot water for showers, potable water for drinking
- Remoteness or perceived remoteness is important to many adventure travelers
- Scenery is very important
- Outdoor recreationists are willing to travel between 4 to 8 hours from a major airport
- Skiers may not be as willing to travel long distances from airports as other travelers, but they are open to other types of winter activities, e.g. snowmobiling, so may be interested in day trips out of the Jasper area.

It would appear that the members of these organizations could be potential markets for Grande Cache, as Grande Cache possesses the qualities that they are seeking in a destination. Its location relative to a major airport does not appear to be a limiting factor for these people if they are convinced the destination has the type of experience they want. The clean, affordable accommodation currently in Grande Cache would be acceptable to this market, as would the available camping facilities.

3.2.2 Findings From Inbound Tour Receptives

A small number of inbound tour receptives were contacted by telephone with questions similar to those posed to the recreation associations. These respondents were in most cases, major operators of group tours in the Canadian Rockies. Copies of the survey questionnaire and the responses are shown in Appendix B; the main conclusions are as follows:

- In a travel experience, customers look for:
    - Word of mouth referral or travel articles
    - A variety of experiences
    - Something significant to see
- An attractive destination is one that provides:
    - Attractions or points of interest
    - Unique experiences
    - Cultural or historical features
- Accommodation preferences are for:
    - Fixed roof – 3 star or above
    - Downtown location
- Remoteness or perceived remoteness is not as important as scenery
- Clients willing to travel no more than 3 hours from a major airport but day trips of 10 hours are acceptable if stops are scheduled every 2 to 3 hours

It would appear at first glance, that organized bus tours would not be a good market match with Grande Cache's existing product base, as its hotels are not 3 star and it is over 4 hours to a major airport. However there may be opportunities that have been overlooked. Although Grande Cache is too far from a major airport for these clients, there are significant numbers of people in Jasper (slightly over 2 hours drive away) who could be bused to Grande Cache on a day trip, to participate in adventure or cultural experiences. With further probing, the tour operators conceded that **if** an area held significant appeal they would be willing to put their customers in hotels that were not 3-star standard. So potentially, bus tour groups from Jasper could be brought to Grande Cache to undertake a series of activities and stay overnight or longer. To attract this market will require differentiating the product from similar ones in Jasper or Banff. As mentioned in Section 2.3.1 Grande Cache's competitive advantage lies in the range and uniqueness of adventure activities it can offer.

3.3 Issues and Challenges Regarding Potential Markets

The review of market research and the telephone interviews suggest a number of issues or challenges that should be considered as product market development occurs. Foremost among those would be:

- Adventure travel is made up of a wide range of people and activities; marketing to them needs to be focused to be cost effective. A shot gun approach targeting all "adventurers" is unlikely to be successful.
- Customers are price sensitive. Adventure travelers will compare the products and packages from Grande Cache against other provinces and possibly against, American offerings. Pricing will need to be competitive unless tour operators are able to demonstrate a unique product, for example, expedition trips. An expedition trip allows travelers to be the "first" to do something, or to undertake an activity under challenging conditions not normally open to travelers. Grande Cache is positioned to offer a number of these trips due to the relatively undisturbed land found in the Willmore Wilderness Park. This is discussed in more detail in Sections 5 and 6.
- Attracting bus tours to the Grande Cache area will require differentiation of the product from other mountain areas, such as Jasper. The wilderness setting for adventure activities, along with unique features (caribou populations, dinosaur tracks, aboriginal tourism) provide a definite competitive advantage. If bus tours were attracted to the Grande Cache area, it will be important to orient customers in advance as to the type of accommodation they will be using (i.e. clean but not fancy). But the study shows that Grande Cache could attract bus tours if the product and marketing were developed carefully. This area may merit more focused investigation in the future.
- Total growth potential in the Grande Cache Area is difficult to predict, as it is hard to measure the cumulative impact of all potential product areas being developed concurrently. It can be anticipated though, that a mix of products will make Grande Cache more attractive as a destination, than a one tourism-activity town.

4.0 Assessment

In order to assess Grande Cache's overall potential as an adventure travel destination, it was necessary to evaluate the existing tourism product and identify if areas with potential development opportunities existed. Results from these assessments were positive and are discussed in Sections 4.1 through 4.3

4.1 Assessment of Existing Tourism Products, Services and Events

The existing tourism facilities in Grande Cache were included in this assessment. A nine day site visit was conducted which provided the opportunity to view some of the topography, staging areas and facilities. Where scheduling, snow and climate conditions allowed, equipment, buildings and physical setting were examined. Due to the February timing of the study, the site visit occurred during the off-season so some areas were inaccessible, and it was not possible to view actual tours. Where available, videos and photographs of the summer activities were viewed. Websites and brochures were reviewed prior to arriving in Grande Cache.

Trail head at Sulphur River Rafting Staging Area

Each business or operation was evaluated in the context of its ability to meet the expectations of adventure travelers. The assessments were subjective, and based upon the expertise of team members when combined, have over 30 years of experience in the adventure travel industry, both in Canada and around the world. While discussions and the level of physical inspection varied, interviews focused on the functional areas of marketing, operations, staffing, risk management, and management. Time restrictions prevented detailed discussions of each area with all operators, but sufficient information was gathered for an evaluation of each operation.

To structure the assessment process, each offering was evaluated as to whether it needed improvement to meet adventure traveler expectations (1), would meet expectations in its current state (2) or exceeds adventure traveler expectations (3). **This is not a comment on the potential for improvement but a commentary on whether the existing product can attract adventure travelers and meet their expectations for a vacation experience**. It is recognized that there are adventure travelers seeking an upscale tour, but experience also shows that the adventure traveler is by nature, more flexible in accepting lower quality supporting facilities if the core experience is unique or well delivered.

The assessments made during the site survey would not necessarily apply to the ability of the Grande Cache tourism providers to meet the needs of other types of travelers e.g. other leisure travelers not pursuing adventure activities.

Results of the site inspections are shown in Table 4.1.1 . Key findings from this assessment are as follows:

- Most operators had a good understanding of their markets, but overlooked opportunities to sell their product to international markets. Examples of missed opportunities would be the lack of marketing targeted at tourists driving to Alaska, Jasper tourists, and expedition seekers.
- Marketing materials for many operators were high quality, showing good brochure and web site development. Others were more rudimentary and in some cases, hard to find. Most operators did a reasonable job of distributing their brochures, often using the Visitor Information Centre, hotels, gas stations, plus mail-outs to existing customers, etc.
- Tourism providers partner together to sell their products. Most providers have participated in some form of cooperative marketing either through the adventure packages developed in 2000 and expanded in 2001, or through Death Race promotions. Most refer business to each other, although there were very few situations where commissions were sought or paid for these referrals. Interviewees continually referred to their desire to see other businesses succeed without worrying about reciprocal financial return to their organizations.
- Staging areas for rafting and kayaking are challenging and present significant operating difficulties, which will only be exacerbated if tourist numbers increase.
- Businesses have been in existence for many years, however many are supplemented by income from other industries, especially in off-season and slow periods. Business planning is informal, although most operations appear to be well run. Many of the operators could likely benefit from some assistance in developing business or market plans.
- Staffing is not an issue. Lack of competition for staff means that securing good people is not problematic and most owners consider training an important part of their business. There are few guides in the area, but those working are *certified where appropriate*, experienced and well trained.
- For those businesses interviewed who operate in remote areas, there appears to be adequate risk management. Guides interviewed, (often the owner), have appropriate certification and first aid training, and have plans in place for bad weather, illness or accidents.
- Many of the operators were concerned about the image of the town, and also felt that improved signage was needed, along with a beautification process for the town centre.
- Land use concerns seemed to be focused mainly on securing land within the town limits for development. No operators mentioned problems with land use outside the town, except for those operators who had horses. They expressed concern over a lack of grazing areas.

Table 4.1.1 Grande Cache Adventure Tourism Site Inspection Summary n=15				
Functional Area	1 Needs Improvement	2* Meets Expectations	3** Above Expectations	Not available Or Not relevant
Marketing				
• Good understanding of target markets	27%	60%	13%	0%
• Quality of marketing materials	47%	40%	13%	0%
• Distribution of material	27%	67%	7%	0%
• Cooperative marketing efforts/cross marketing	27%	67%	7%	0%
Operations				
• Quality & condition of equipment	13%	60%	20%	7%
• Office or permanent location	0%	67%	7%	27%
• Staging areas	7%	27%	0%	67%
• Business planning	67%	20%	7%	7%
Staffing				
• Knowledge & certification of guides	7%	40%	7%	47%
• Labor pool-quantity, skill level	0%	67%	7%	27%
• Ongoing training	7%	67%	0%	27%
Risk Management				
• Liability insurance	0%	67%	0%	33%
• Safety management plan for remote rescue	7%	47%	0%	47%
Management				
• Length of time in business	20%	73%	0%	7%
*would meet expectations of an adventure traveler in its current state ** exceeds adventure traveler expectations. This is not a comment on the potential for improvement but a commentary on whether the existing product can attract adventure travelers and meet their expectations for a vacation experience				

4.1.1 Commercial Outfitters Based Outside Grande Cache

The Willmore Wilderness Park is used by a large number of commercial outfitters for hunting and trail riding. Two outfitters located locally were included in the site inspections discussed in Section 4.1. Attempts were made to contact several of those based in other areas. Due to the large number who were away at this time of the year, only two phone interviews were possible.

The intent of these interviews was to determine:

- Their main market
- The extent to which they use Grande Cache services and their satisfaction with them
- Their capacity utilization
- Concerns around regulations or land issues
- Other issues or challenges facing commercial outfitters

Given the small number of people contacted, it is **not** possible to assume the information gathered applies to the outfitters in general. However the findings are of some interest as the potential for tourism growth is considered. Major findings were as follows:

- Outfitters who provide hunting experiences are at full capacity. They can sell as many tags as they have; one outfitter is booked until 2005.
- There are perceptions that:
    - there may be too many commercial operators in the Willmore to allow reasonable financial returns
    - there are some operators who do not operate their businesses professionally, thus negatively impacting the visitor experience and the destination's image.
- Grande Cache services are not used extensively by all outfitters. In one case, an outfitter mentioned it was hard to book rooms in Grande Cache. One cannot predict the end of a hunt exactly, so rooms cannot be booked in advance, leaving the outfitter and guests to compete with work crews for rooms.
- One operator commented negatively on the new Cowlick Creek Staging area, saying that the flat rock and angle of the trail causes footing problems for horses.

4.1.2 Visitor Information Centre

Visitor Information Centre

An important part of the tourism infrastructure in Grande Cache is the Visitor Information Centre. This was visited several times and a review done of the layout and marketing activities of the centre.

Observations are as follows:

- The Visitor Information Centre is well placed, visible from the highway and attractively designed.
- Exhibits in the VIC provide a tremendous amount of information about the Grande Cache area including the natural history, culture, economic activities and tourism activities.
- Previous studies *(Ference Weicker, 2000*) had indicated a need to make adventure product opportunities more visible within the centre. One of the earlier concerns has been addressed, as brochures have been moved to the front of the building and are one of the first things a visitor sees upon entering the building.

- The gallery or gift shop offers a limited array of local crafts, and local artwork is displayed on the second floor. The shopping appeal of the VIC could be enhanced with a partnership with the Aseniwuche Winewak Nation, putting aboriginal crafts on sale.
- The displays at the VIC are static, although there is some interaction by the VIC staff and volunteers with visitors. Interpretative talks or presentations by adventure tour operators could be offered several times a week during busy seasons to engage the visitors and encourage them to sample local activities or extend their stay.
- Several areas of the building lend themselves to special events. These should be marketed as a resource for special events and trip orientations for bus tour operators
- An interactive electronic terminal may be helpful in dispersing local/regional information.

4.1.3 Death Race Special Events

New to Grande Cache is a series of special events that focus on extreme adventure products. Offered in 2000 was a Canadian Death Race Run of 125 km crossing 3 mountain summits and gaining 13,000 feet in elevation. Attracting close to 200 participants, it was a success on all fronts. Everyone enjoyed the race which significantly increased Grande Cache's visibility as an adventure destination, and made local citizens aware of their potential as a tourism provider to extreme adventurers.

The Death Race Series is the creation of the Canadian Institute of Extreme Racing, a non-profit organization based in Grande Cache. In addition to an annual Death Race Run, there is an annual Death Race Ride planned to start in August 2001. A Death Snowshoe is scheduled for January 2002 and to keep interest in the series of events, a Grande Cache Hunt for Gold is open to fortune hunters from July 2001 till January 2002.

Supplementing these products is the proposed Passport to the Peaks program, where climbers are challenged to climb the 20 peaks ringing Grande Cache. Each peak will eventually have a cairn holding a stamping mechanism and climbers are encouraged to go for bronze, silver or gold pins, as they return to the Grande Cache area to climb even more peaks.

These Death Race events have been extremely well marketed, and have received rave reviews from participants. A five-fold increase in participation is expected for this year's Death Race Run, with people coming from around the country and the world. Linked to the actual event are the training camps, an opportunity to arrive early to acclimatize to the elevation and mountain conditions. This, coupled with the fact that each participant generally brings non-participating spectators, has meant that the Death Race has been a significant special event for the tourism industry. This impact is expected to grow with the additional events and increased participant numbers this year.

Accommodations for event participants probably presents the most significant challenge at present. The race organizers operate an active billeting program which helps spread around the economic benefits, and campgrounds are busy over the race days. In 2000, everyone was able to find room at hotels, billets or campgrounds. With the much larger number of participants this year, organizers are looking at temporary camping facilities within the town. Adventure travelers are a very adaptable group and in keeping with the experiences of other event organizers, will be satisfied with relatively primitive camping conditions if there is access to water and showers. Currently, racers can use the recreation centre for showers and it is anticipated this would continue.

Death Race 2000 was held under ideal weather conditions and no safety problems occurred. Some residents expressed concern that problems could arise if there was bad weather during the event or accidents. However, the event organizers appear to have put considerable planning resources into ensuring that racers are tracked, monitored and supported in the event of problems.

To date, Death Race organizers have faced challenges financing the event. It appears they may have overlooked some sponsorship opportunities with outdoor equipment manufactures or related parties. However, as a result of the study, they have been put in contact with such appropriate sources.

The Death Race was successful in garnering media attention from local and national radio, television and print media, including a segment on the Outdoor Life Network. Organizers have been proactive in seeking media attention, and may benefit further by adapting some new strategies (such as sending press releases to the media of participants' hometowns, to let them know a local person is competing in the Death Race).

This Death Race series of events represents significant potential to Grande Cache for increasing its destination awareness, and in stimulating grow in adventure tourism products and services.

4.2 Assessment of Local Support for Existing and New Tourism Products

From the numerous conversations held with tourism providers, town representatives, forestry managers, citizens, resource managers, and members of the Aseniwuche Winewak Nation, it is possible to assess the existing level of community support. It is recognized that not all sectors of the community were contacted as part of this study, specifically those that are not directly affected by tourism, so the findings may be somewhat biased. However, some general conclusions can be made from the people contacted, and they are summarized as follows:

1. Support for tourism growth is very strong among tourism providers and those people who benefit directly from tourism activities.
2. Government (municipal and provincial) has provided support within basic regulatory requirements, i.e. granting permits, enforcing regulations in Willmore Wilderness Park, allowing access to staging areas, providing municipal commercial land for sale. While all interviewees felt town council had been good financial stewards, some entrepreneurs expressed concern that town officials did not sufficiently encourage new tourism products or services.
3. Citizens endorse tourism where it brings economic benefits (especially jobs) for themselves or their children as they grow up. Some citizens are concerned about tourism growth if it results in crowding or changes to their own recreation experiences.
4. With regard to potential tourism development or new products, only one concern was expressed about increased volume or new product types. That was stated as a

desire to not attract drug-using tourists. The lack of concerns around increased growth may be due to the low capacity utilization currently existing, and the difficulty in visualizing a situation with too many customers.

5. Support for tourism seems high at this time but some of this support may be due to the current lack of other economic activities in Grande Cache. Tourism is perceived as an engine for economic growth, but some people admitted that if other economic prospects were available, some people would likely shift their support away from tourism. It was perceived that this shift would be to a mood of apathy i.e. focus shifting to new activity, as opposed to any opposition for tourism development.

4.3 Assessment of Products, Services and Events

Grande Cache currently has a wide range of adventure products; some such as trail riding, are provided by a number of operators, others, like hiking, are offered by only one company. Given the market research outlined in Section 3, the businesses of Grande Cache appear well positioned to capture the interest of the adventure or extreme adventure traveler as the activities and settings they offer match the preferences of these market segments.

The studies done of campground visitors to Grande Cache in 2000 (Ference Weicker) show that those people have a high level of satisfaction with Grande Cache once they can be enticed to stop. The resource base outlined in Section 2 would also show that there are significant opportunities that have not yet been developed into an adventure tourism experience. Using the findings from the market research, telephone interviews, and site inspections, and the experience of the study team, the potential for development is summarized by sector in Table 4.3.1.

Tour operators offer a range of products at this time and while many of these businesses operate at around 30% capacity, with proper market development, it is felt there is potential to grow across a wide range of activities. Those activities that depend upon access to forestry lands such as snowmobiling and ATVs, may be limited to some extent, as use needs to be coordinated with Weyerhaeuser. This has not been a concern to date, but if significant growth occurred, there could be problems accommodating all user needs.

Winter products at this time have a lower potential for development due to a variety of factors. Firstly, snow conditions in recent years have been inconsistent both in Grande Cache and in the Rocky Mountains as a whole. Many winter tourism providers have suffered losses in business. Winter products offered at this point are limited; a few trails at Pierre Grey Lakes Recreation area and the Marv Moore campground, and some snowmobile rentals. The snowmobile rentals will cease in 2001 and there are no dogsledders in the area at this time. While these are not insurmountable barriers to developing the potential of winter tourism, it is an indication that it will take longer to develop and may have smaller market potential. Some opportunities may exist, as telephone interviews with ski associations indicated that downhill skiers often participate in other winter sports, so skiers in Jasper could represent a market for Grande Cache businesses if they were to offer dogsledding, snowmobiling or snowshoeing as an add-on to their ski vacation. The Canadian Rockies TDR is also focusing on winter tourism with its marketing activities, so there are opportunities to leverage marketing dollars to develop winter tourism products and make Grande Cache a four season destination. It is likely that the winter tourism product will continue to be small scale for the short to medium term.

Table 4.3.1						
	Does Product Exist Already?			Potential For Tourism Development		
Tour Operators	Guided	Self-Guided*	Rentals	Market Potential** I= International N= National P= Provincial L= Local/Regional	Development** Potential L= Low M= Medium H = High	Comments
Rafting	Y	N	N	I	H	
Biking	N	Y	N	I	H	
Trail riding	Y	Y	Y	I	H	
ATV	Y	Y	Y	N	M	Use occurs in FMA
Snowmobiling	Y	Y	Y	I	M	Use occurs in FMA
Fishing	Y	Y	N	I	H	
Canoeing	N	Y	N	N	M	
Kayaking	Y	Y	Y	I	H	
Xcountry skiing	N	Y	N	P	M	Lack of consistent snow cover
Dogsledding	N	N	N	I	M	Lack of consistent snow cover
Wildlife Watching	Y	Y	N/A	I	H	
Flight seeing	N	N	N	I	H	
Jet boating	Y	Y	N	I	L	Will need to resolve use conflicts

*This category refers to tourists currently undertaking adventure activities without the benefit of a guide. Where N is indicated, it would mean that self-guided tourism use is low or non-existent at the present time (based upon interviews with local operators).
** Potential was a subjective assessment based upon: 1) the study team's site visit to Grande Cache, 2) the market research summarized in Appendix A (which outlines what activities and destination qualities adventure travelers say they prefer), 3) the study team's years of industry experience, and 4) their professional knowledge of what sells nationally/internationally.

Some activities, such as jet boating, offer an enjoyable experience for participants, but can dominate an environment to the extent that other uses are negatively impacted especially as the number and types of users increase. These potential conflicts would need to resolved in order to develop adventure tourism activities to an optimum level.

Wildlife viewing is an activity that has not been developed to any great extent in Grande Cache, although there are some signs and viewing areas. Market research consistently shows wildlife viewing to be a popular activity with adventure travelers. Grande Cache has some significant populations of large carnivores and ungulates, namely wolves, woodland caribou, moose, Bighorn sheep and mountain goats. They are visible with minimal effort on the part of the wildlife watcher, so special events or tours focusing on wildlife have high potential for future development. As impacts on sensitive wildlife populations may be a concern to resource managers, it may be desirable to develop wildlife viewing under controlled circumstances. For example, if a caribou watching festival was organized during the winter months it could include a series of activities such as guest speakers, nature films, nature art displays, a caribou-themed 10K run or walk, and small-scale, guided caribou tours. This can keep much of the activity within the town thus, maximizing the economic benefits, while minimizing the interaction with caribou.

The dinosaur tracks and the opportunity to view them, can represent soft adventure or educational tourism. The significance, rarity and uniqueness of these tracks, and the high levels of interest worldwide in paleontological sites, would indicate that this is an area of high potential if access issues can be resolved.

Flightseeing tours have proven to very popular in other destination regions, e.g. Alaska, and could be offered in Grande Cache. With a conveniently located airport and great scenery, it would be an adventure activity with good potential. Other possible aviation products would be hangliding or paragliding however further investigation would be required to determine the full potential.

Grande Cache lends itself well to photography and opportunities may exist to promote this activity, perhaps through a special event. If people were invited to a photographic “challenge” event, say, where pictures must be taken of specified sites within a designated time frame, there could be tremendous benefits to tourism. Marketing to the large photography companies could generate corporate sponsorships and international media attention. In addition, the photographs from the event could be shown around the world, as winners and losers share their results with the media and their home communities. Developing activity packages aimed at photographers may be another option.

No commercial operators exist for mountain biking in the region although business opportunities may exist. There are many kilometers of scenic trails of the Willmore Wilderness Park, and the lack of biking restrictions found in several national parks, would give a tour operator the basis for a good product. Marketing such a product would also be helped by the introduction of the Death Race Ride in 2001 that will raise tourists’ awareness of Grande Cache mountain biking possibilities.

Some of the rivers in the region such as the Berland, lend themselves to canoeing. While no guided trips are available at this time, the wilderness experience available in the Willmore could appeal to travelers. Fishing in the area is also a popular activity given the number of species, however the only guided services that currently exist are provided by the commercial horse outfitters. Opportunities may exist to provide guiding services, bait and tackle.

Other potential products that may merit further investigation are ice fishing or windsurfing as the area has several lakes that are easily accessible, fish populations, and strong summer winds.

Accommodation has been identified as a limiting factor in the past for tourism growth. This is due to the high occupancy rates in summer during major construction or plant maintenance, making rooms unavailable for tourists, or because some visitors want a more up-scale experience than those currently offered. Many of the hotels experience close to 100% occupancy in the winter when many hotels are traditionally slow. The combination of these factors would suggest that there is potential for developing new accommodation. While it is felt the existing accommodation is adequate to support a young adventure destination, there are travelers who would take advantage of more upscale accommodation if it were available. Location of new accommodations will likely be dependent upon the scale and type of development, market needs and availability of land.

4.4 Grande Cache As An Adventure Destination

Overall, Grande Cache meets the criteria of a viable adventure/extreme adventure destination. It possesses the core elements needed to offer an adventure product and in sufficient size to establish itself as a destination for the adventure seeker.

The lure elements that Grande Cache possesses are:

- an extremely attractive physical setting
- a protected area that:
    - supports a healthy ecosystem
    - will not be given over to other uses, thus providing stability for tour operators
- diverse wildlife populations
- trails for hiking, biking, trail riding and cross-country skiing at a variety of skill levels and trip lengths
- rivers for rafting, canoeing, and kayaking at a variety of skill levels
- accommodation suitable for adventure travelers
- an established group of adventure tour operators
- a large, well-placed visitor information centre with full time staff
- a successful special event that has gained recognition internationally
- a location that is 2.4 hours from an international destination (i.e. Jasper national Park) and on one of the shortest, most scenic routes to Alaska
- an active association of tourism operators

As further evidence that Grande Cache can be considered a viable adventure or extreme adventure destination, this form of tourism is currently ongoing in Grande Cache and those people who can be convinced to visit Grande Cache (although not necessarily as adventure travelers), report a high level of satisfaction with Grande Cache *(Ference Weicker, 2000).* The fact that many adventure operators are operating at low capacity levels appears to be a marketing issue.

While it appears that Grande Cache contains many of the elements needed for an adventure tourism destination, and that the market characteristics and size could provide for a viable product/market match, growth constraints must be considered. Successful development will require tackling a number of issues, including capacity development, potential conflicts with multiple land use as use increases, and a lack of destination awareness.

Grande Cache does not have high name recognition within Alberta or further abroad. Those people who have heard of Grande Cache associate it with industrial uses and often have a negative perception. There has been little information to contradict this perception on the tourism front. A search of several guidebooks for data on Grande Cache showed that Grande Cache was not mentioned in the major publications, in fact, the only reference found was in an obscure book on the backroads of northern Alberta. The Travel Alberta publications provide accommodation and campground listings on Grande Cache but there is no Grande Cache section in the 2001 Travel Planner. Grande Cache itself produces an excellent publication on the activities and tourism facilities it offers and has distributed these to travelers in the past. There is a limited number of these remaining, but there is a definite need for a similar publication if travelers are going to be enticed to visit Grande Cache.

Market development will be critical if Grande Cache is to live up to its potential as an adventure tourism destination. With a well-crafted strategy and a concerted effort for implementation, it is possible to develop Grande Cache into a world-class adventure tourism destination.

5.0 Opportunities

5.1 Opportunities For Tourism Development

As discussed in Section 4.3 and 4.4, there is a tremendous range of opportunities for tourism development.

In the short term, those that are likely to have the greatest chance of success are:

- *products and services linked with special events*. These could include packages or promotional opportunities linked to the planned expansion of the Death Race series.
- *adventure activities targeted at tourists already in the community* i.e. people traveling to Alaska on highway 40. This would require tours or activities that meet their needs and travel patterns. As many of these people are traveling, activities offered at the end or beginning of the day, and are short in duration (one to two hours) may be most appropriate.
- *expedition-type tour*s for rafting, trail riding or hiking that will attract high levels of media interest. These are described in more detail in Section 5.2 but present an opportunity for existing tour operators to reposition existing products e.g. trail riding along some of the little used trails in the Willmore, to attract an upscale client.
- *retail sales of aboriginal crafts*. The AWN has indicated an interest in selling arts and crafts made in their community. With some development of retail and business skills, these could be offered to adventure travelers as mementos of their visit.
- *interpretative talks and adventure presentations.* People can be convinced to buy adventure travel products if they have a better awareness of the experience and the ways to participate in the Grande Cache area. Talks or presentations on the natural features of the region, or videos or slide presentations by adventure operators can be helpful in generating consumer interest.

In the medium to long term, those activities that might be pursued are:

- *day trips for bus tour groups out of Jasper*. As discussed in Section 2.3.1, trips would need to focus on activities not already present in the Jasper area (e.g. dinosaur tracks or aboriginal tours) or different from those being offered (e.g. rafting on “wilder” rivers), wildlife viewing tours or special events. These have been described in more detail in Section 4.3.
- *a wider and deeper range of adventure activities* e.g. guiding services for fishing, more kayaking or rafting tours, a wider range of equipment rentals
- *additional special events* such as a photography-themed ecochallenge event (as discussed earlier) that could be used to generate tourism visitation and carry images of Grande Cache around the world
- *additional accommodation facilities*. This could take the form of additional B&Bs, increased capacity at campgrounds or development of new facilities. As obtaining land outside the corporate boundaries may present difficulties due to existing land

use commitments, it is recommended that efforts be focused on smaller-scale developments. These activities could include encouraging the development of B&Bs (training, standards, etc), adding sites or services to campgrounds, making the keys more accessible for the Hide-A-Way camp, or offering familiarization tours to those people who may be interested in investing in hotel, lodge or resort developments.

- *aboriginal tours*. Possibly this could include observations of traditional activities being performed, visits to historical sites, or viewing of cultural events. The AWN has indicated a need for skill development in the area of product development and marketing, but the interest in tourism already exists.
- *paleontology tours*. The dinosaur tracks within the former Smoky River coalmine site could be used as the basis for educational tours. The potential of the dinosaur track sites for tourism purposes is presently being examined.
- *improved signage for trails in the Willmore*. Although rudimentary signage exists, better signage to help visitors find and follow the trails would be desirable. Safety concerns have been expressed about the Sulphur Gates viewing area.
- *improvements to the appearance of the town business district*. As mentioned in Section 4.1, many tourism providers have expressed concerns with the town appearance. Improved signage, a better town centre appearance, and the creation of people-friendly places were the most requested changes.
- *creation of a rodeo hole for kayaking competitions*. A rodeo hole is a “hole” in the river (man-made in this case) that creates a standing wave, large enough for a boat to get stuck in, but easy enough to exit through paddler’s skill. While in the hole, the paddler performs stunts e.g. enders, side surfing, back surfing, which are designated by the Whitewater Rodeo Association as competition requirements. These provide considerable spectator opportunities and can form the basis of a special event.

Although it is difficult to estimate the potential market size for Grande Cache, there are some indicators of the potential size of Canada’s adventure tourism market that may be relevant. As shown in Table 5.1.2, Canada has yet to tap the potential of the adventure travel market. Using rafting as an example, current travel activity is 138,560 person trips. The number of people participating in these activities is over 16 million and the projected travel demand is just over 8 million. Canada to date has captured only 1.7% of the potential market share which would imply that there is significant room for expansion and that Grande Cache could expect some dramatic growth if they are successful in product and market development.

Determining Grande Cache’s potential market size as a destination will depend upon a number of factors such as:

- success in marketing
- ability to deliver consistent, quality adventure experiences
- effect of multiple activities being developed simultaneously
- competition from other destinations with similar products
- global economic forces e.g. strength of Canadian dollar, levels of disposable income, etc

Conservative estimates are probably preferred given the constraints that Grande Cache faces but it would appear that much of the market potential is untapped for adventure activities in Canada.

Table 5.1.2 Projected Canadian Potential for Adventure Travel and Ecotourism Markets					
Activity	Projected Travel Demand - N. America (person-Trips)	Current Travel Activity in Canada (person-Trips)	Canada's Current Average Share of Potential	Activity Participation in North America	
				%	No. of Participants
Wildlife Viewing	22,000,000	160,670	0.7%	31.3	68,750,000
Bird Watching	14,878,000	22,200	0.1%	27.0	59,510,000
Other Wildlife Viewing	N/A	6,490	N/A	N/A	N/A
Water Based					
Canoeing	7,260,000	182,740	2.5%	6.6%	14,520,00
River Kayaking	495,000	3,560	0.7%	0.4%	880,000
Rafting/floating	8,360,000	138,560	1.7%	7.6%	16,720,000
Sailing	2,640,000	2,460	0.1%	4.8%	10,560,000
Land Based					
Backpacking	8,360,000	N/A	N/A	7.6	16,720,000
Mountain Climbing	7,425,000	N/A	N/A	4.5	9,900,000
Orienteering	3,960,000	N/A	N/A	2.4	5,280,000
Hiking	26,235,000	61,260	0.2%	23.8	52,470,000
Rock/Ice Climbing	6,105,000	12,990	0.2%	3.7	8,140,000
Camping (primitive)	15,400,000	N/A	N/A	14.0	30,800,000
Bicycling	2,300,000	27,870	5.4%	28.6	63,000,000
Trail Riding (horseback)	3,905,000	211,620	5.4%	7.1	15,620,000
Caving	2,585,000	N/A	N/A	4.7	10,340,000
Winter					
Dog sledding	N/A	7,280	N/A		N/A
Cross-country skiing	1,815,000	48,960	2.7%	3.3	7,260,000
Snowmobiling	1,925,000	47,930	2.5%	5.5	7,700,000

Randolph 1996: from HLA/ARA 1994; US Travel Data Centre, industry estimates; & Tourism Canada 1995

5.2 Increasing the Extended Stay Market

With any tourism development, a key component is increasing the time that visitors spend in a destination. Some tourism activities in Grande Cache have already taken this into account. For example, the Death Race event encourages people to come early for training camps or to acclimatize. They also delay the awarding of plaques by a day so that people will linger longer.

On the other hand, those people traveling to Alaska will stop for the night, but research has indicated it is difficult to get them to stay longer (Ference Weicker, 2000). A better strategy for this market may be to get them to spend more money during their stay through short tours or activities geared to their travel patterns. For example, tour operators could do slide shows at the Marv Moore campground in the evening with the added opportunity to do a short ride, raft or hike early in the morning before they resume their trip.

As for other markets, those opportunities for increasing the length of stay could include:

- *More adventure-themed special events with activities for spectators and participants*. People attending a special event have usually made that the focus of their trip. A full range of activities and attractions will encourage them to spend more time in the area. Possible activities in this category discussed earlier, were wildlife watching festivals or photography challenge events.

- *Packages of adventure activities.* Packages have been consistently shown to be popular with travelers because of the convenience they provide, and by combining accommodation and activities, it helps extend the time spent in the host community. Grande Cache is in its second year of offering adventure packages and should continue its efforts in this area.
- *Expeditions.* As mentioned earlier, Grande Cache is well situated to offer expedition trips. The chance to blaze new trails or be the first to raft a river is a tremendous attraction for travelers and the media. People undertaking such expeditions will spend more time on the actual trip with stays in the community before and after the expedition. As well, the media attention that such a trip can garner will bring people into the community for longer periods of time. One of the study members has been leading exploratory expedition trips for many years. His company, New World Expeditions is one of a few in the world, (others are Mountain Travel-Sobek and The Explorer's Club), offering exploratory expedition trips. About 20 to 50 such trips occur each year around the world, for example, the first rafting of the Yangtzee River Tiger's Leap Gorge (offered by Sobek), the first rafting of the Rio Bio Bio River in Chile, the first rafting of the Tezeke River in Ethiopia, or the Titanic expedition with The Explorer's Club. Prices for these trips range anywhere from $5K for a relatively short trip at a domestic location, to $65K for a longer-term trip with extensive support requirements, such as deep-sea submersibles. Examples of expeditions currently offered can be found at www.mungopark.com.

5.3 Positioning Strategies

Grande Cache must deal with its lack of name recognition among adventure tourists. This can be done by increasing marketing activities that position Grande Cache as a destination that offers a whole range of adventure products in one stunning setting. While the actual image or specific slogan is best left to the community to develop, it is felt that something that incorporates the themes of adventure (lots of it, and at a variety of skill levels) possibly in a frontier context would be successful. Grande Cache as the adventure frontier would hold appeal to those people looking for an active vacation and the chance to explore a unique and relatively unexplored setting. While developing the image that will position Grande Cache favorably, it is important to convey the sense of challenge and unique experience that tourists can find in a wilderness park, without frightening those who are at a lower skill level or perhaps lacking in confidence.

Grande Cache is competing against other destinations offering adventure products, but has an advantage in its ability to offer a wide range of activities, many of them at a world class level. It must also face competition from the national parks found to the west, such as Banff, Jasper, Kootenay and Yoho or even further south in Waterton. Tourists from the regional or provincial markets will look at these parks as offering similar experiences with less driving (Calgary residents) or better quality facilities (Edmonton residents). Marketing messages may need to focus more on the affordable nature of Grande Cache's experience or the opportunity to experience the undiscovered in materials targeted at these audiences. The types of wildlife viewing opportunities in Grande Cache are also different from those found in the Rocky Mountain national parks (for example, Woodland Caribou can be seen and sightings of moose and wolves are common). This could be used to position this destination more favorably with provincial markets.

5.4 Communities With Similar Histories

Elliot Lake, Ontario

Elliot Lake is a community with many similarities to Grande Cache. A town of 13,000 people, it depended upon uranium mining for its jobs until the mines were closed in the early 1990s. Situated in the northern boreal forest, there are 4,000 lakes within 100 kilometres of the community. Tourism was traditionally based upon hunting and fishing with several small and primitive lodges or camps scattered around the numerous lakes.

Ten years ago, the government (provincial and municipal) saw tourism as means to save the community from extinction. Money was made available to create a tourism master plan and to help retrain people with guiding skills. Accommodation in the area was, and continues to be very limited. There are 5 main hotels and lodges providing 150 rooms for visitors. People who chose to get involved donated hundreds of volunteer hours to the planning and development process.

To date, their efforts have been rewarded. A series of extreme adventure special events (similar to the Death Race) bring 10,000 to 15,000 visitors annually; there are now 6 packagers and 16 independent guides in the community, and occupancy for the 5 main accommodation providers is 100%. Much of the activity that draws visitors is motorized (e.g. snowmobiling and ATVing). Elliot Lake distinguishes itself as the only snowmobiling destination in the area where none of the trails go over open water. The mine site, which was an environmental eye sore, has been reclaimed, with the exception of the tailing ponds, and the decommissioning process has become the feature of many tours. Interest in the process has been high among visitors to the area.

In conjunction with the effort to build a larger tourism industry, efforts were made to position Elliot Lake as a retirement community. In the last decade, 5,000 retirees have moved to the community and have turned out to be a significant resource for tourism development. Their expertise and contacts have been invaluable.

With the recent cancellation of the spring bear hunt, many traditional tourism operators in outlying areas have suffered significant income losses. The focus in Elliot Lake is now on developing more ecotourism or nature tourism products, and in increasing capacity. Much of their efforts are focused on building business skills, as much of the growth is anticipated through small businesses.

Land use conflicts have been one of the critical issues for tourism development in Elliot Lake. Lead by the tourism association, volunteers have spent countless hours discussing multiple recreation uses e.g. snowmobiling, canoeing, hiking, ATVs, and industrial uses, such as forestry. They have set out trails and now have maps of the area. They have also worked hard to deal with conflicts between competing uses. The past president of their tourism association says that without this process, tourism would not have succeeded in the area.

City council has also been seen as a positive factor in tourism development. Elected officials over the years have been very committed to developing tourism and supported the ongoing planning and discussion processes. They were also instrumental in controlling the type of tourism development in the city, by guiding the way in which land was used. Again, their support was seen as critical for the success Elliot Lake has enjoyed in tourism.

New River Gorge National River, West Virginia

The New River in West Virginia is one of the oldest river systems on the continent. Situated among the communities of Hinton, Beckley, Glen Jean and Fayetteville, the economy of the area was based on coal mining until the mid 1960s when the mines closed. At the time, several outdoor enthusiasts saw the opportunity to offer commercial rafting trips on the New River. The river is well suited for rafting, flowing in a pool-drop fashion that allows for great whitewater followed by quiet stretches of water with time to pick up any people who may have fallen out. The popularity of these trips has grown over the years and currently, there are 20 tour operators in the area offering rafting trips from April to October. In 1997 there were 250,000 rafters on the New River and its sister river, the Gauley. The economic impact on the community has been huge. In the rafting industry alone, $22.9 million has been generated in personal income, $16.6 million in employee compensation and 1416 full and part-time jobs created *(Whisman, 1997)*. Raft companies draw from those areas within a 10 hour drive (a population base of approximately 10 to12 million people).

Although the communities surrounding the New River were suffering from economic woes, it was people from surrounding states, such as Ohio, who are credited with seeing the tourism opportunities and providing the impetus for developing the destination.

5.5 Map of Possible Tourism Uses

See Overleaf

6.0 Implementation Strategies

Strategies presented in Sections 6.1 and 6.2 represent broad-based recommendations for product development, resource management, community involvement, and market development. These recommendations are derived from findings of the:

- Grande Cache site visit and meetings with stakeholders
- Review of secondary market research
- Telephone interviews with recreation associations and inbound tour receptives.

They represent the areas where effort is needed to improve the Grande Cache adventure tourism base, from increasing sales, to product diversification, to consideration of the natural resources, to name a few. The Action items are general concepts that will need to be expanded into detailed steps prior to actual implementation. In some cases, for example, the addition of new product or special events, detailed marketing or business plans may be required.

6.1 Implementation Strategies For All Sectors

Recommendation	Timing*	Action	Order of Magnitude**
Product Development			
Develop aboriginal product	S S	• Cultivate cottage industry for aboriginal crafts • Hold product development & marketing workshop for AWN	$1-5K $5-10K
Expand accommodation base	S S S-M M M	• Encourage development of B&Bs • Make key to Hide Away camp available to travelers outside of regular working hours • Invite venture capitalists interested in developing hotel or resort property up for familiarization tour e.g. representatives from Calgary/Edmonton Chamber of Commerce • Encourage development of full service campground through tax incentives, land access • Expand number of sites or services at existing campgrounds	N/A N/A $5K N/A N/A
Expand special events	S-M M	• Investigate the feasibility of holding other special events with adventure or cultural themes e.g. aboriginal drumming, photography ecochallenge. • Develop a business and marketing plan for new events	N/A $10-30K
Make adventure activities more accessible	S S S M M	• Add or improve signage at trail heads • Expand range of maps available for sale • Make wildlife viewing guides and regional interpretative guides available • Expand range of rental equipment available • Improve signage at Cowlick Creek staging area	$2-25K $7-12K $1-15K N/A $5K
Improve town appearance	S S S S M	• Upgrade the paint on main mall • Add greenery to town centre • Improve first impressions of town through Welcome signs • Construct visual barrier for industrial storage visible at entrance to Marv Moore campground • Consider overall town beautification process	$5K $5-10K $5K+ $5K $50-200K
Secure future of dinosaur tracks as a historic and tourist resource	S-M M	• Secure access to site for tourism purposes • Develop educational tours to site	$15K+ $10K
Upgrade human infrastructure	S M M M	• Expand customer service training to retail sector • Provide business development and marketing skill workshops for tourism providers or people interested in starting adventure tourism businesses • Develop guide training opportunities • Add tourism class to high school curriculum to develop skills of seasonal staff	$50/pariticpant $5-10K N/A N/A
Investigate possibility of privatizing some tourism functions	M	• Explore possibility of allowing private businesses to take responsibility for some municipal assets e.g. operations of Marv Moore Campground; development of commercial land	N/A
Resource Management			
Streamline access to municipal commercial land	M	• Evaluate commercial land pricing	N/A
Establish stakeholder discussion group to deal with land use issues e.g. multiple use conflicts, signage, trail development	M M L	• Identify sponsor for stakeholder group e.g. Tourism Operators Association • Invite wide range of stakeholders to participate on community • Consider advocacy efforts to increase the number of resource managers working in Willmore Wilderness Park	N/A N/A N/A
Community Involvement			
Increase community support for tourism		• Increase tourism profile through contests aimed at school participation e.g. logo concepts • Develop community consensus around image e.g. adventure versus wilderness, destination branding possibly through the use of contests	Minimal N/A

Recommendation	Timing*	Action	Order of Magnitude**
Increase community support for tourism (continued)	S M	• Increase fundraising opportunities for community groups volunteering at special events • To avoid community fatigue, ensure consistent recognition of volunteers for special events	N/Al N/A
Market Development			
Position Grande Cache as an adventure destination	S S M	• Develop identity package including logo • Encourage use of destination logo by all tourism providers • Include adventure image/logo on signs entering community	$10-15K N/A N/A
Develop new marketing partnerships	S S M M	• Set up familiarization tours for tour operators and tourism representatives from Banff and Jasper • Host familiarization tours for Grande Cache front line and hospitality staff • Cultivate long term partnerships with tour operators out of Jasper through annual mailings, visits, etc. • Host a Canadian Rockies TDR meeting in Grande Cache	$5K $3K $1K $1-2K
Develop group tour markets	S-M S S	• Ensure Grande Cache has a presence at major Canadian wholesaler trade shows • Develop a Adventure Travel guide that outlines in detail the adventure activities, accommodation and tourism facilities in Grande Cache • Limit distribution of the existing travel planner to travel shows and group trip marketing efforts	$2K/event $1/guide N/A
Increase share of existing markets	S S S S S S S S S	• Have Grande Cache set up as separate section in the Travel Alberta Attractions Guide • Advertise Grande Cache through car and RV rental companies i.e. make brochures available, provide large matted photographs for hanging in their offices • Continue to get Grande Cache listed in driving tour books • Distribute tour operator brochures in Jasper • Provide talks by adventure tour operators at the Marv Moore campground and the VIC during peak season • Expand promotional activities for adventure tour packages as budgets allow • Create a Grande Cache presence at major adventure travel shows such as the Adventure Travel Show in Chicago. (Other possibilities are San Francisco Chronicle Adventure Travel Show, NBTA, New York Adventure Travel Show). Explore partnering with other Alberta displays to minimize cost and increase physical presence. Possibly include representative from AWN in traditional dress to participate in displays. • Notify map making companies that highway 40 to Alaska is now paved e.g. Rand MacNally, ASTA, AAA, Gazzetter • Look at staggered pricing schemes to encourage repeat visitation for adventure products	$500 $1K $200 $5-15K $2K as available $5K/show $100 N/A
Increase sales of adventure products through the VIC	S S S	• Set up resource inventory for facilities available and have available next to phones for VIC staff to assist in answering telephone, email and walk in queries • Do product demonstrations or talks for adventure tours at the VIC during peak times. • Establish a VIC policy to give equal representation of all tour operators	$50 - $3,000 $1K N/A
* Desired timing of activity, S= in the next year, M= one to two years out, L= three or more years from now ** N/A = information not available or not applicable to category			

6.2 Implementation Strategies – Product Specific

Recommendation	Timing*	Action	Order of Magnitude**
Product Development			
Fishing			
Expand fishing opportunities	S S-M	• Encourage the development of fish guiding services • Encourage the development of retail facility to supply tackle, bait, etc.	N/A N/A
Hiking			
Improve access conditions	S-M S-M	• Work with provincial agencies to examine feasibility of pull-off for hikers going to Muskeg Falls • Add safety railings and improve trail conditions at Sulphur Gates look-out	N/A $150K
Develop expedition product	S S S-M S-M S-M S-M	• Set up an expedition for the placement of Passport to the Peak stamp boxes • Establish a selection process to increase attractiveness of trip • Increase media exposure by contacting the local paper of successful applicants to notify them of the expedition and the fact that a local person has been selected as team members. • Send out press releases. Invite a photojournalist on the expeditions. Target US audiences through publications such as Outside Magazine, National Geographic Traveler. • Approach equipment manufactures and suppliers for sponsorships. • Contact World Expeditions out of Toronto to help sell places on expeditions	Cost recovery basis - $500 for preliminary itinerary distribution to be recovered from trip profits and sponsorships
Rafting/Kayaking			
Develop expedition product	S S S-M S-M S-M S-M	• Set up an expedition for the first descent of Jack Pine River • Establish a selection process to increase attractiveness of trip • Increase media exposure by contacting the local paper of successful applicants to notify them of the expedition and the fact that a local person has been selected as team members. • Send out press releases. Invite a photojournalist on the expeditions. Target US audiences through publications such as Outside Magazine, Backpacker, Canoe & Kayak and Paddler. • Approach equipment manufactures and suppliers for sponsorships. • Contact World Expeditions out of Toronto to help sell places on expeditions	Cost recovery basis - $500 for preliminary itinerary distribution to be recovered from trip profits and sponsorships
Improve access conditions	S M M M	• Make keys to Sulphur Creek access available to tourists. • Fence the gravel pit and open access to the public for paddling. • Improve parking at Sheep River and Sulphur River access points. Add gravel to roads. • Negotiate with AWN to cross their land for river access	N/A $50K $75-100K N/A
Increase spectator opportunities	M	Create surfing/rodeo hole at Smoky River banks near North 40 Campground for River Rendezvous or competitive event H	$2K

Recommendation	Timing*	Action	Order of Magnitude**
Trail Riding			
Develop expedition product	S S S-M S-M S-M S-M	• Set up an expedition for the blazing of new trails • Establish a selection process to increase attractiveness of trip • Increase media exposure by contacting the local paper of successful applicants to notify them of the expedition and the fact that a local person has been selected as team members. • Send out press releases. Invite a photojournalist on the expeditions. Target US audiences through publications such as Outside Magazine, National Geographic Traveler. • Approach equipment manufactories and suppliers for sponsorships. • Contact World Expeditions out of Toronto to help sell places on expeditions	Cost recovery basis - $500 for preliminary itinerary distribution to be recovered from trip profits and sponsorships
Wildlife Watching			
Increase wildlife viewing opportunities	S S M M	• Obtain Alberta government's Watchable Wildlife signage for interpretative trail at VIC • Publish wildlife watching tip sheet with best locations and times along with wildlife viewing ethics. • Develop wildlife watching tours focusing on unique species e.g. wolves, woodland caribou • Investigate a special event themed around wildlife watching	$500 $300 N/A N/A
Resource Management			
Trail Riding			
Ensure sustainable operation of trail riding activities	M M	• Continue to examine options for additional grazing. Operators feel that the inability to obtain additional grazing areas impose undue hardship on their businesses. • Determine carrying capacity or Limits of Acceptable Change associated with horse use in the Willmore Wilderness Park	N/A N/A
Market Development			
Special Events			
Develop regional rivalries around adventure tourism activities	S	• Set up challenges between regional clubs or associations to increase regional tourism e.g. – paintball battles, raft or kayak races	$200
Increase marketing opportunities through sponsorships or partnerships with retailers and manufacturers	S S S	• Approach manufacturers for promotional dollars, equipment loans or donations. Target their advertising and promotion budgets. • Ask manufacturers to send a representative to events. • Tap the outdoor retail stores with no local presence that would have a market in Grande Cache to attend special events, e.g. Eddie Bauer, Mountain Equipment Coop.	$200 $200 $200
* Desired timing of activity, S= in the next year, M= one to two years out, L= three or more years from now ** N/A = information not available or not applicable to category			

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Appendices

Appendix A - Secondary Market Research Tables

Table 1: Profiles of Ecotourists and Related Travelers

Market Characteristics	N. Ontario Ecotourists[1] N = 799	N. American General Ecotourist[2]: N/A/C, N = 1,384	N. American Experienced Ecotourists[2]: N/A/C, N = 424	Canadian Ecotourists[3]	Australian Nature-Based/Ecotourists[4]	UK Group Frequent Ecotourists[5] N = 379	UK Group Occasional Ecotourists[6] N = 247
Household Income	3.6% <$10,000 8.2% $10,000-20,000 9.6% $20,001-30,000 9.4% $30,001-40,000 13.1% $40,001-50,000 11.2% $50,001-60,000 9.6% $60,001-70,000 6.7% $70,001-80,000 > $80,000	Live in neighborhoods with >US$35,000 (CDN$45,000)	no information	57% >$50,000 CDN 36% >$70,000 CDN av. ~$64,000 CDN	higher incomes	13% <£10,000 15% £10,-15,000 22% £15,-20,000 17% £20,-25,000 12% £25,-30,000 21% >£30,000	33% <£10,000 12% £10-15,000 14% £15-20,000 14% £20-25,000 9% £25-30,000 18% >£30,000
Age	3.5% 16-20 22% 20-29 34% 30-39 27% 40-49 9% 50-59 3.5% 60-69 1% 70+	10% 18-24 24% 25-34 25% 35-44 18% 45-54 23% 55+	2% 18-24 20% 25-34 28% 35-44 28% 45-54 23% 55+	46% 45-64 22% 35-44 11% 25-34 11% 70+	36% 20-29 23% 30-39 27% 50+	7% 17-24 15% 25-34 27% 35-44 24% 45-54 18% 55+	28% 17-24 28% 25-34 16% 35-44 17% 45-54 11% 55+
Gender	64% male 36% female	males & females, varies by activity	males & females, varies by activity	50:50	55% female 45% male, varies by activity	54% females 46% males	57% females 43% males
Household	58% married 37% single 4% divorced 1% widowed	44% couples 1/3 families	47% couples ¼ families		no information	58% married 34% single 8% divorced	54% single 39% married 7% divorced
Education	3% some high school 4% high school diploma 15%trade qualification 41% some univ/college 31% univ/college grad 6% postgraduate studies	45% college grads 30% some college 21% high school 5% some HS	82% college graduates 14% some college 4% high school 1% some HS	>64% university education 24% some post secondary	all levels, but potential ecotourists tend to be more highly educated	38% first degree 25% secondary ed. 23% postgrad 15% high school	46% first degree 22% secondary ed. 21% postgrad 11% high school
Party Composition/ Travelling Companions	33% friends 31% family 27% friends & family 3% alone	59% couples 26% families w. children 7% alone	61% couples 15% family 13% alone	no information	30% couples 14% family/friends 45% alone (visitors less likely to be unaccompanied)	66% one 18% two 9% three 4% four 3% other	63% one 15% two 9% three 5% four 9% other
Occupation	70% white collar 15% student 5% retired 5% blue-collar	no information	no information	no information	Professionals greatest. Number	no information	no information

1. Twynam & Robinson 1997; 2. HLA/ ARA 1994; 3. Eagles & Cascagnette 1993; 4. Blamey & Hatch 1998, 5. Diamantis 1998, 6. Diamantis 1999.

Table 1A: Profiles of Ecotourists and Related Travelers

Market Characteristics	US Adventure & Outdoor Traveller[1] N = 1,172	US Adventure Traveller[2]: N = 608	US Wildlife Watchers [3]: N = 14,414	Pennsylvania Outdoor Travelers N= 1,994[4]
Household Income	76% >US$30,000 (CDN$40,000) 24% < US $30,000 (CDN$40,000) 18% >US$75,000 (CDN$100,000)	11%< $20,000 US 14% $20-29,999US 34% $30-49,999 US 41% $50,000US+(combined) median $44,900 US	16%< $20,000US 23% $20-29,999US 26% $30-39,999US 14% $40-49,999US 16% $50-74,999US 16% $75-99,999US 17% $100,000US+	16% < $25,000 US 42% $25–50,000 US 26% $50-75,000 US 16% > $75,000 US
Age	51% 25 - 40 25% 45 - 64 10% 65+ Average is 40	43% 18-34 42% 35-54 14% 54+ mean age 39	10% 16-24 19% 25-34 29% 35-44 22% 45-54 10% 55-64 9% 65+	17% 18-34 41% 35-49 27% 50-64 15% 65+
Gender	51% male (vs. 60% travelers overall), varies by activity	51% males 49% female	50% males 50% females	No information
Household	66% married (vs. 56% travelers overall) 50% have children (vs. 37% travelers overall)	65% married 27% single 8% divorced/widowed /separated 55% child in household 58% multiple wage earners	No information	68% married 15% never married 11% divorced 5% widowed 2% separated
Education	41% completed college	27% high school 33% some college 24% college graduate 16% post graduate	21% 5+yrs college 18% 4+yrs college 26% 1-3yrs college 27% 12 yrs 6% 9-11 yrs	No information
Party Composition/ Travelling Companions	58% couple 36% w. (grand) children 34% w. other adults 11% w. (grand) parents 4% alone	60% spouse (soft) 41% spouse w. children (soft) 48% friends (hard)	No information	38% families 32% couples 15% 3+adults 9% alone
Occupation	35% professional/ mgr. 14% blue collar 12% retired 10% clerical	38% professional/mgr. 15% blue collar 12% not employed 10% retired	no information	31% professional/mgr. 28% not employed 24% tech/sales/admin 10% other

1. TIAA 1994; 2. TIAA 1998; 3. US Dept Interior 1996; 4. Pennsylvania Department of Conservation and Natural Resources. 1999

Table 2: Preferences of Ecotourism and Related Travelers

Market Characteristic	N. Ontario Ecotourists[1] N = 799	North American General Ecotourist (next trip)[2] N = 1,384	North American Experienced *Ecotourist*[2] (next trip) N = 424	Australia Nature-Based Tourists[3]	UK Group Frequent Ecotourists[4] N = 379	UK Occasional Ecotourists[5] N = 247
Activity Preferences	Ranking: visiting provincial parks day-trip hiking flatwater canoeing-single day visiting water parks multiple day hiking multiple day flatwater canoeing cross country skiing-single day wildlife viewing swimming whitewater canoeing-single day	Hiking (37%) Touring (20%) Camping (19%) Boating (17%) Walking (17%) Fishing (16%) Scenery, other than mtn./ocean (14%) Swimming (12%) Other water (9%) Local cultures (8%) Cycling (8%)	hiking (60%) rafting (25%) &other boating (13%) cycling (25%) camping (21%) wildlife viewing (15%) scenery other than mtns/ocean) (13%) skiing (13%) canoeing (13%) kayaking (13%) fishing (12%) local cultures (12%)	all international visitors nat. parks (50%) bush walking (19%) scuba/ snorkeling (13%) aboriginal sites (11%) outback safari tours (3%) rafting (2%) horse riding (2%) rock climbing/ mountaineering (2%)	educational guided tours (72%) admiring nature - (72%) observing animals - 68% bush walking (54%) adventure tours (46%) nature photography (45%) observing flowers (40%) snorkeling (38%) bird watching (35%) whale watching (31%) horse riding 22%) whitewater rafting (22%) scuba diving (22%) rock climbing (19%)	admiring nature (76%) observing animals (71%) snorkeling (62%) educational guided tours (60%) natural photography (51%) camping (49%) scuba diving (48%) bush walking (47%) adventure tours (37%) observing flowers (37%) whale watching (33%) white water rafting (28%) turtle watching (26%) bird watching (25%) horse riding (21%)
Accommodation	38% tent 32% motels B&B 3% During activity: 26% primitive tent campground 17% basic lodge or hut 17% organized tent campground 11% B&Bs 7% hotels/motels	56% hotel/motel 17% camping 14% lodge/Inn 14% cabins 10% B&B 6% friends/relatives 5% RVs 60% mid range luxury 31% basic/budget	66% cabin/cottage 60% lodge/Inn 58% camping 55% B&B 41% hotel/motel 40% ranch 56% mid range luxury 38% basic/budget	N. Parks visitors: 70% hotel/motel 42% friend/relative 8% camp 8% backpacker hostel 6% rented house/flat 4% youth hostel	60% hotels/motels 41% tent 32% cabins 30% B&Bs 29% Ecolodges 20% Inns 6% ranches 58% midrange luxury 40% basic/budget	53% tent 41% hotels/motels 25% B&Bs 23% cabins 19% ecolodges 10% Inns 3% ranches 48% midrange luxury 47% basic/budget

1. Twynam & Robinson 1997; 2. HLA/ ARA 1994; 3. Eagles & Cascagnette 1993; 4. Blamey & Hatch 1998, 5. Diamantis 1998, 6. Diamantis 1999.

Table 2A: Preferences of Ecotourism and Related Travelers

Market Characteristic	US Adventure & Outdoor Travellers[1] N = 1,172	US Adventure Traveller[2]: N = 608	US Wildlife Watchers [3]: N = 14,414	Pennsylvania Outdoor Travelers N= 1,994[4]
Activity Preferences	camping (85%) hiking (74%) skiing (51%) snorkel/scuba (30%) sailing (26%) kayaking/ whitewater (24%) biking (24%) rock climbing (18%) cattle/dude ranch (14%) hang glide/parasail (8%)	Soft adventurers: camping (70%) hiking (49%) biking (30%) bird/animal watching(26%) Hard adventurers: whitewater rafting/kayaking (48%) snorkeling/scuba diving(40%) off road biking or mtn biking (35%) backpacking (26%) rock climbing (24%) spelunking (18%)	observing wildlife (97%) photograph wildlife (51%) feed wildlife (42%) type: birds (75%) land mammals (75%) fish (36%) marine mammals (15%) other -turtles, butterflies (49%)	nature/sightseeing (20%) camping (19%) hiking (9%) hunting/fishing (6%) rafting/boating/ canoeing (6%)
Accommodation	no information	no information	no information	no information

1. TIAA 1994; 2. TIAA 1998; 3. US Dept Interior 1996; 4. Pennsylvania Department of Conservation and Natural Resources. 1999

Table 3: Trip Reason and Motivations of Ecotourism and Related Travelers

Market Characteristic	N. Ontario Ecotourists[1] N = 799	North American General Ecotourist (next trip)[2] N = 1,384	North American Experienced *Ecotourist*[2] (next trip) N = 424	Canadian Ecotourists[3]	Australia Nature-Based Tourists[4]	UK Group Frequent Ecotourists[5] N = 379	UK Group Occasional Ecotourists[5] N = 247
Reasons, Motivations	Ranking: Enjoying sights,sounds, smells of nature Scenic beauty Getting away from civilization Emotional release Relaxing mentally Experiencing a feeling of freedom Doing something w. family Exploring new places	45% scenery & nature 28% new experiences /places 16% been & want to return 15% cultural attraction 15% see mountains 14% study/learn nature & cultures 13% relax & get away from it all	45% scenery & nature 22% new experiences /places 16% land activities 15% wildlife viewing 14% see mountains 11% wilderness 11% not crowded 11% water activities 10% cultural attraction 10% study/learn nature & culture	1. wilderness/ undisturbed nature 2. learn about nature 3. tropical forests 4. birds 5. photography 6. trees & wildflowers 7. mammals 8. national & provincial parks 9. lakes & streams 10. see maximum in time available 11. mountains 12. oceanside	1. natural beauty of sites 2. new experience 3. wildlife 4. close to nature 5. different way of experiencing nature 6. exciting experiences 7. something to tell friends 8. educational/learning experience 9. being physically active 10. chance to escape crowds 11. escape towns & cities	93% see natural environment 85% experience local culture 78% experience traditional & natural lifestyles 74% travel to wild places on earth 70% survey/study natural habitats 61% historical attractions 59% experience unique exclusive place 45% outdoor/recreational activities 34% third world countries 14% expensive holiday	1. experience new & different lifestyle 2. explore area & be educated 3. increase knowledge 4. meeting new people 5. outdoor activities 6. undisturbed natural area 7. enjoy weather 8. study/ admire/ understand area 9. interesting countryside 10. cultural attractions 11. experience tranquility 12. visit national parks

1. Twynam & Robinson 1997; 2. HLA/ ARA 1994; 3. Eagles & Cascagnette 1993; 4. Blamey & Hatch 1998, 5. Diamantis 1998, 6. Diamantis 1999.

Motivations for adventure *varied by age* (although most popular reason for all was **fun or entertainment**)

- 59% of 45-54 year olds took the trip to **get away from it all**, vs. 51% for all adventure travelers
- 39% of all 18-24 year olds took the trip for the **thrill** vs. 21% for all adventure travelers
- 30% of 55-64 year olds took the trip because of an **interest in the environment** vs. 14% for all adventure travelers

Table 3A: Trip Reason and Motivations of Ecotourism and Related Travelers

Market Characteristic	US Adventure & Outdoor Traveller[1] N = 1,172	US Adventure Traveller[2]: N = 608	US Wildlife Watchers [3]: N = 14,414	Pennsylvania Outdoor Travelers N= 1,994[4]
Reasons, Motivations	71% fun & entertainment 51% get away from it all 21% thrill 15% try/learn something new 14% interest in environment 7% learn/test something about selves 7% health	48% soft;39% hard interest in a specific activity 25% adventure participation just an activity not a motivator 68% are middle of the road in their interest in adv activity 12% live for adventure	no information	64% not to far to travel 56% friends/relatives in the area 41% more beautiful landscape/scenery 27% traditionally vacation there 20% wide variety of activities there 20% good value for the money

1. TIAA 1994; 2. TIAA 1998; 3. US Dept Interior 1996; 4. Pennsylvania Department of Conservation and Natural Resources. 1999

Table 4: Origins

Market Characteristic	N. Ontario Ecotourists[1] N = 799	North American General Ecotourist (next trip)[2] N = 1,384	North American Experienced *Ecotourist*[2] (next trip) N = 424	Canadian Ecotourists[3]	Australia Nature-Based Tourists[4]	UK Group Frequent Ecotourists[5] N = 379	UK Group Occasional Ecotourists[5] N = 247
Origins	19% S. Ontario(exc Toronto) 18% Metro Toronto 16% Minnesota 9% Illinois 8%New York ** all members of MEC or REI	From sampled residents (therefore does not necessarily represent propensity for adventure)	SW US had most respondents 28% Cal 8% Tex 6% Wash 5% NY 4% Alaska 4% Fla 4% Canada	Sample from Canada (CNF or FON members, Cdns who went to Kenya, or Costa Rica)	28% other Asia 22% Japan 14% New Zealand 10% UK & Ireland 8% US 5% Other Europe 4% Germany 2% Canada	Sample from UK	Sample from UK
Expenditure / Willingness to Spend		Willingness to spend on *total* trip < $500 15% $501-1,000 25% $1,001-1,500 21% $1,501-2,000 16% $2,001-3,000 14% $3,001-5,000 6% > $5,000 2%	Willingness to spend on *total* trip < $500 7% $501-1,000 22% $1,001-1,500 26% $1,501-2,000 21% $2,001-3,000 16% $3,001-5,000 7% > $5,000 1%	< $2,000 $2,000-3,999 24.8% $4,000-5,999 24.4% $6,000-7,999 20.5% $8,000-9,999 8.8% $10,000-11,999 4.9% >12,000 10.9%	<u>IN</u> AUS expenditures A$ 3,349 Switz 2,881 Scand 2,752 Canada 2,578 Germany 2,471 Other Eur 2,321 Other Asia 2,249 US 1,991 UK & Ireland		
Preferred Destination		US Sample: 21.5% Canada 38.5% US 40% other Canadian sample: 64% Canada 12% US 24% other	47% Canada 28% US (when asked Prov or state): 12% said AB 32% said BC	N/A	N/A	58.3% Europe 24.3% Asia 23.1% Americas 33.8% Aust/NZ/Pacific 31.9% Africa	30.0% Europe 24.3% Asia 23.1% Americas 11.7% Africa 10.9% Aust/NZ/Pacific
Reasons for Destination	Ranking: Presence of lakes Presence of rivers, streams Areas w. views of undisturbed natural scenery Access to drinking water View of waterfalls Variety of wildlife Large trees	45% scenery 28% new experiences/ place 16% return trip 15% experience cultural attraction 15% see mountains 15% study/learn nature/cultures	45% scenery/nature 22% new experience/place 16% land activities 15% wildlife viewing 15$ see mountains 11% wilderness 11% not crowded 11% winter activities				

1. Twynam & Robinson 1997; 2. HLA/ ARA 1994; 3. Eagles & Cascagnette 1993; 4. Blamey & Hatch 1998, 5. Diamantis 1998, 6. Diamantis 1999.

Table 4A: Origins

Market Characteristic	US Adventure & Outdoor Traveller[1] N = 1,172	US Adventure Traveller[2]: N = 608	US Wildlife Watchers [3]: N = 14,414	Pennsylvania Outdoor Travelers N= 1,994[3]
Origins	Adventure travelers are similar to all NTS travelers re region of origin 19% in Pacific (most live there) 16% E N Central & S. Atlantic	32 %South 25% West 25% Midwest 18% Northeast	45% MSA of 1,000,000+ 20% MSA of 250-999,999 11% MSA of 50-249,999 14% Outside MSA (rural)	44% Pennsylvania 14% New York 10% New Jersey 6% Ohio 5% Maryland 4% Virginia
Expenditure / Willingness to Spend	$871 on av. spent on outdoor or adv. Trips <$500 51% $500-2,500 25% $2,500-5,000 4% >$5,000 2%	Willingness to spend on *total* trip $USD < $500 26S/22H% $501-1,000 15S/18H% $1,001-2,499 10S/18H% $2,500-4,999 5S/6H% > $5,000 2S/6H%	$9,007US avg. /trip 24 days/year $14,854 US equipment	$ 58/day (vs $73 avg. PA traveler) $197/trip (vs. $146 avg. PA traveler)
Preferred Destination	No information	No information	No information	No information
Reasons for Destination	No information	No information	No information	No information

1. TIAA 1994; 2. TIAA 1998; 3. US Dept Interior 1996; 4. Pennsylvania Department of Conservation and Natural Resources. 1999

Appendix B
Telephone Survey Summary

TARGET GROUP: RECREATION ASSOCIATIONS

NAME OF ASSOCIATION: ____________________

PERSON TALKED TO: ____________________

DATE CALLED: ____________

Market Characteristics:

1. Can you give us information on the profile of your membership? (If this can be mailed out, we will ask for a copy)
    - Age
    - Education level
    - Income levels
    - Where they live
    - Who they travel with
    - Activities they do*** *probe further – do independently or in package? If in package, what elements do they look for?*
    - How they make travel decisions

- (4)Not available. Associations consider this information confidential and are not willing to share it.
- (1) Will send later

2. Do you have a general listing of members that can be purchased or rented? (We would hope to use these in marketing strategies as part of the implementation plan)

Yes (3) No (2) Not sure (2)
- Available to members only – America Outdoors
- Available to trade only but will consider other uses (CSGA)
- Depends on a case by case basis. Must submit request in writing, they consider the membership information very good information and protect it.(NPRA)

3. Can we get copies of your newsletters? (will provide information on "hot buttons", advertising opportunities, current issues) What is the distribution of your newsletter (range and profile)?

Yes (4) No ( )
Will be sent in the mail.
Available on the ATTA website

Destinations Qualities/Attractiveness:

1. What motivates your members to travel to a particular destination?

- Affordable transportation costs, family orientated vacations, unique experiences
- New destinations with a wow effect

- New places that are supported with some infrastructure
- Uniqueness, wildlife, scenery, safety, stability of government, things to do for families
- Is a big movement for grandparents/grandkids trips
- Challenge, beauty, diverse activities, whitewater, climbing rock and ice, raw nature both summer and winter
- New snow, nice scenery
- Outdoors, scenery, mountains, social scene, some nightlife
- There are two types, one group is looking for a traditional family vacation and will go to the same place for years. They are loyal to the destination. The other type, is looking for something new that is not found around them. They look for new opportunities and theme-based vacations.

2. What qualities do members seek in a destination? (name as many as possible)

- Good services, cultural experiences, natural resources, e.g. mountains, wildlife, a different location other than what they are used to seeing
- Extensive trail system for both mountain biking and a good map of the road system for touring bikes.
- Good facilities i.e. showers, food service
- Friendliness, security, natural resources, culture
- Variety of terrain, a range of levels of difficulty e.g. some easy and some hard to extremes (for all sports)
- Lift networks, trails marked with degrees of difficulty, ski facility
- Most important is snow quality. Facilities can be primitive for cross country skiers and snowboarders, downhill people like more comfort.
- Comfort with the safety level of the trip
- Professional leadership, outfitters with good judgement, skills and safety record
- Good equipment

3. How important is accommodation to your members? What type of accommodation do they require? Must it be fixed roof? *Probe – what types of services or amenities do they look for in fixed roof?*

- Are looking for clean hotels/motels, does not have to be deluxe
- Will always be a group that wants tents. For extended day trips, B&Bs or lodging is preferred. Approx. $50US is what they are willing to pay for a room. (cyclists)
- Does not need to be a fixed roof. There are very successful tented camps on platforms that are doing great (see Alaska Woodlands web site as an example)
- Cabins acceptable if they are heated and have water. Basic shelters can be used but must have access to water.
- Must be fixed roof; 2 to 3 star is acceptable (skiers)
- Downhill skiers want 3 to 5 star accommodation, cross country skiers and snowboarders are okay with more primitive accommodation
- Depends upon the activity. If people are looking for outdoor experiences they are willing to tent but most would like basic shelter with hot water for showers.

4. How important is remoteness or perceived remoteness, as defined as a feeling of being away from heavily populated areas, to the activity your members undertake while on a trip?

1 not important   2 (1)   3 (1)   4 (2)   5 (3) very important

- Very important to the adventure traveler
- Setting is more important than remoteness, the goal of the experience needs to be great, and that doesn't always require remoteness
- Snow quality more important than remoteness
- Looking for a feeling of getting away from it all

- Most people don't know what remote is. Having a remote location could be attractive in itself as most people don't know how to experience remoteness.

5. How important is beautiful scenery to the activity?
1 being not at all 2 (1) 3 4 5 (6)
(i.e. indoor climbing gym,) i.e. Mountain Climbing/ Trekking Expedition).

- Scenery very important to adventure traveler and for families going on vacation. Sometimes the scenery is the whole point of the trip.
- A must, very important!
- Snow quality most important factor
- Ski marketers take it for granted. We don't show the beauty in the marketing images, we only show close-ups of a person plowing through snow. You don't know where they are in the world.
- Tremendously important, it is what makes people come back to do it again.

6. How far are your members willing to travel from a major airport?

- 4 hours is within the range of a family trip
- 4 to 6 hours from a hub city/airport to the destination to start a bike trip
- Committed adventure travelers would travel 4 to 6 hours to get to a destination. If it was 7 to 8 hours, the percentage would drop to 70%.
- 5 hours is reasonable.
- For skiers, the maximum is 2 hours. A trip of 4 hours or more would be too far (2).
- Grande Cache would have to have something really special to draw downhill skiers this far from a major airport.
- If the destination were attractive enough it would draw from 4 hours away. But it has to be attractive enough to draw and make it worth the ride.

7. Is there any other type of thing that your members would like to see or do other than X (e.g. climbing) activity while in a destination?

- All activities that are accessible to families e.g. fishing, photography, wildlife watching
- Restaurants, bars, music, fishing, hiking
- Scenery, culture, fishing, photography
- Wildlife viewing, interpretation trails on botany, history, or geology
- Shopping, dining, night time entertainment, bars, movies, ice skating, snowshoeing, cross-country skiing
- Restaurants, social scene
- Depends on the area you are going to. Perhaps miniature golf or real golf courses.
- A good Laundromat

OTHER COMMENTS:

- The Grande Cache area is ripe for development. Market the allure of remoteness and make sure the guide services are of high quality.
- Market to the clients of Jasper and Banff for day trips.
- Market to car rental companies who have clients standing there looking for something to do for the day.
- Build your base on day trippers and with time, word of mouth will get you longer stays.
- Has been too much reliance on government to do marketing.
- Have good designated trails for both on and off road cycling.
- Natural resources have huge banking potential. Offer writer's fam tours and get TV exposure.

- Our organization promotes sports participation, we would be willing to help with a Grande Cache special event.
- For an adventure destination, it is important to show the consumer that you have search and rescue capabilities, medical help is available for this kind of remote destination, and that the guides are well trained.
- Do careful market research, market for downhill skiing is very soft right now.
- Heli-skiing is a very expensive option and a limited market. There is an attractiveness of being remote and a new place, a good marketing job can bring people to the area as this crowd looks for bragging rights.
- Make use of the geographic location, develop scenic, historic and scientific spots and make them educational.
- City needs to become supportive to the concept of hosting travelers. Become sort of a base camp. Have suppliers, Laundromats, etc. Outfitters need to work with the town as well.

TARGET GROUP: INBOUND TOUR RECEPTIVES

NAME OF ASSOCIATION: ______________________________

PERSON TALKED TO: ______________________________

DATE CALLED: ____________

Market Characteristics:

1. Can you give us information on the profile of your clients?
   - Age
   - Education level
   - Income levels
   - Where they live
   - Who they travel with
   - Activities they do
   - How they make travel decisions
   - *Probe** are there key product or package elements that your clients look for?*

- This information was considered confidential by tour operators and they are unwilling to share it.

2. Does your business have international clients? (May be answered during #1)If so what country is your best market for adventure products?

- Yes, England and Italy
- Yes, from all over the world, many Japanese, Europeans
- Yes, Asia, Australia, South Pacific, USA
- Yes, but they are corporate travelers, not leisure

Destinations Qualities/Attractiveness:

1. What motivates your clients to travel to a particular destination?

- Reading about the destination in a magazine
- Word of mouth
- Lots of referrals from the Winter Olympics
- Information distributed in Edmonton
- Total experiences, not just one thing but a package of experiences
- A little bit of everything
- We own everything so we have control over our product. We are consistently reliable in our product delivery. That is our position in the marketplace.
- Something significant to see
- A variety of activities are important

2. What qualities do your clients seek in a destination? (name as many as possible)

- Motorcoach tours of Jasper, Banff and the parks in the area
- Attractions
- Points of interest
- Unique experiences

- Must have entertainment, arts, music
- Trees
- History (2)
- Sightseeing
- Cultural attractions
- Think FITs would find the area attractive if there were a lot of adventure activities you can sign up for on the spot.

3. How important is accommodation to your clients? What type of accommodation do they require? Must it be fixed roof? *Probe – what types of services or amenities do they look for in fixed roof?*

- Downtown location important
- 4 star a minimum, willing to pay $100-125 US per double room e.g. Jasper Sawridge, Banff Park Lodge other hotels they use
- Fixed roof is necessary. Must be a 3 star like Holiday Inn Express. Clean.
- Fixed roof is necessary. 3 to 5 star is acceptable. Customers like spas and air-conditioning.
- My clients would not stay in less than a 3 star hotel but I think that young FITs would be okay with inexpensive hotel/motels especially if it has a common lounge, internet access, and access to gear rentals.

4. How important is remoteness or perceived remoteness, as defined as a feeling of being away from heavily populated areas, to the activity they are undertaking on vacation?

1 not important	2	3	4 (1)	5 (1) very important	No answer (2)

- People want something new
- Part of the whole package experience
- Remoteness is important but Grande Cache is not unique, you can drive only 3 hours out of Calgary and get the same experience.

5. How important is beautiful scenery to the activity?

1 being not at all	2	3	4	5 (3) very important	No answer (1)
(i.e. indoor climbing gym,)				i.e. Mountain Climbing/ Trekking Expedition).	

- Can't believe the question
- You need beautiful scenery PLUS lots to do

6. How far are your clients willing to travel from a major airport?

- Seniors crowd travels for 2 hours then stops for breaks, more than 3 hours they will start to complain
- Edmonton is the closest place to start a bus tour to Grande Cache but they (survey participants) have never heard of it. They also cannot remember seeing it advertised at a trade show.
- Maximum time for a day trip in total is 10 hours. Three hours driving each way from an airport is acceptable.
- 90 minutes to the first stop. If the product is specialized and of good quality the clients are willing to go further.
- Not applicable to my clients but have seen young backpackers travel overnight by bus to reach something they want to see. Think that upscale fly and drive clients may be okay with a 4 to 5 hour drive to a destination if you have set up the draw.

7. Is there any other type of thing that your clients would like to see or do other than X (e.g. climbing) activity while in a destination?

- Clients like free time to explore the town, museums, etc.
- History, mountains, mines and history are important.
- A festival with a recognized name and talent associated with it.
- Nature walks
- Golfing

OTHER COMMENTS:

- A destination that wants to attract seniors or bus tours needs 4 star hotels, dinner theaters, musical revues, cultural centers, art museums, clothing shops and bars. They would need to attend NTA trade show, Rendezvous Canada, ABA show to promote the destination to tour companies.
- Offer a fam trip for tour operators and bus operators.
- Develop a dude ranch.
- Play up the Alaska route.
- Develop the history attractions especially if there is anything related to the gold rush, aboriginal culture.
- There is a lot of opportunity to develop Grande Cache.
- Start a co-operative marketing initiative with other companies that are outside the park and try to get people to come up from Jasper and Banff by playing up the remoteness. Work with neighboring communities of Edson (skiing, snowboarding), Hinton (Hot Springs), Rocky Mountain House (hunting) to draw people. Use the gateway into Jasper to start the draw from.
- Promote to Albertans as a better, economical vacation that is more remote with less foreigners.
- Start to develop a youth hostel.
- Make use of the Hinton airport for sightseeing flights.
- Need to develop the access roads in and out of the area.
- Some of the highest mountains are in this area. Make better use of Highway 40 and develop RV services in town.
- Market to car rental companies as they are the first to see the FIT traveler.
- The area has great potential that is underdeveloped.
- Grande Cache is too far out of the way for our core product. We can get the same product closer than going all the way up there.
- The Edmonton route to Alaska via Grande Prairie is better than the one that runs through Grande Cache.
- The best way to market is to car rental and RV companies.
- No one from Grande Cache has ever called to see if we have an interest in their area.
- A backpacking bus shuttle from Jasper may be a way to get your adventure seekers into Grande Cache.
- Grande Cache could be positioned as a good regional draw for Albertans wanting mountains but unwilling to spend big dollars.
- Not sure if it will be possible to get Grande Cache to show up on the radar screen for international clients.
- Recent research has shown that with nature lodges, only the budget and high end ones make money. The ones in the middle don't, this may be something for Grande Cache to consider, i.e. target the inexpensive facilities for backpacking types.
- Could maybe tie in with a rail package.
- May be opportunities for motorized forms of recreation as there are many conflicts occurring in areas where motorized and non-motorized recreation users come into contact.
- Need to develop a "cache" for the destination that is cool and different.

SURVEY PARTICIPANTS

RECREATION ASSOCIATIONS

Adventure Travel Trade Association, Jerry Mallet, Director
America Outdoors, David Brown
Bicycle Retailer & Industry News, Adam Vincent, Editor
Canadian Sporting Goods Association, Yves Paquette, President
National Recreation and Parks Association, Van Anderson, Director of Professional Services
National Ski Areas Association, Bob Linde, Director of Marketing
Pacific Northwest Ski Areas Association, Scott Kaden, President

NOTE: Ski associations were contacted in order to obtain information about supplementary activities of skiers and to get an understanding of destination requirements from other potential markets.

INBOUND TOUR RECEPTIVES

Brewster Tours, Greg McCartney, General Sales Manager, North
Grey Line Worldwide Bus Tours, Gerald Parent, Director of International Membership
Mayflower Tours, Susan Smetana, Operations Manager Western Canada
Mountain Quest Adventure Company Ltd., Trent Schumann, President

Appendix C
List of Businesses Participating in Site Inspection

Acorn Motel
Avalanche Adventure Tours
Grande Cache Hotel
H & R Rentals
Hide-Away Camp
High Country Vacations
Inn of the Valley
Misty Mountain Apartments and Suites
North of 40 Campground
Pozzy's Paintball
Sheep Creek Backcountry Experiences Ltd.
Subway Restaurant
Taste of Wilderness Tours
U Bar Enterprises
Wild Blue Yonder

Outfitters Participating In Telephone Survey

Horseback Adventures Ltd.
Sherwood Guides & Outfitters

Appendix D
Major Man-Made Tourism Resources

Hotels (6)
Acorn Motel
Grande Cache Hotel
Inn on the Valley
Big Horn Motor Inn
Alpine Lodge Motel
Misty Mountain Apartments and Suites

B&Bs (2)
Mount Hamel B&B
Mountain Quest Bed and Breakfast

Campgrounds (7)
Pierre Grey's Lake Provincial Recreation Area
Marv Moore Municipal Campground
Sheep Creek Recreation Area
Big Berland Campsite
Smoky River South
Sulphur Gates Provincial Recreation Area
Kakwa River Recreation

Hide A-Way Camp (primitive cabins)

Restaurants (13)
Grande Cache Pizza
Vegas Pizza and Spaghetti House
Subway
Alpine Lodge Restaurant
Mountainview Family Restaurant
High Country Steak and Ale
Rockies Bar &Grill
Big Horn Family Restaurant
Grande Cache Golf and Country Club
Bakery Café at Michel's Super A Foods
Milos Steakhouse and Pizza
Dragon Palace Restaurant
Wild Rose Saloon

Tour Operators (9)
Wild Blue Yonder
U Bar Enterprises
Taste of Wilderness Tours
Sheep Creek Backcountry Experiences Ltd. (also offer backcountry cabins)
Avalanche Adventure Tours
Pozzy's Paintballs
Smoky River Riding Stables
High Country Vacations
H& R Rentals

Visitor Information Centre
Grande Cache Tourism and Interpretive Centre

Sources: Ference Weicker, 2000; Grande Cache Travel Planner

Appendix E
Websites Profiling Comparable Products and Destinations

www.cherokee-nc.com

This web site is the official home page of the Eastern Band of the Cherokee Indians who have been very successful in developing tourism to benefit their nation.

www.nps.gov/neri

This web location provides a profile of the New River, West Virginia, as discussed in the report.

www.nps.gov/neri/whitewater

This site shows the number of whitewater tour providers on a National River system.

www.nps.gov/pwro/rtca

Included on this web site, is information on the economic impact of protecting rivers, trails and greenway corridors.

www.state.tn.us/environment/parks/hiwassee

At this site are examples of communities who have created tourism destinations using rivers (iwassee, Ocoee) as the base for world-class adventure products

www.r8web.com/cherokee

This web site presents a profile of Cherokee National Forest. It is an example of how communities and government have worked together to negotiate water allotments, as river-based tourism has generated more economic activity than hydroelectricity.

www.nowr.org

This is the web site for the American Whitewater's National Organization of Whitewater Rodeo. This may be helpful in explaining how the creation of a hole in the river can form the basis for a kayaking special event.