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Peter W. Williams, J. Kent Stewart and Bernard Campbell

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See table of contents

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Adventure Travel in Western Canada: Strategic Management Issues and Actions

Peter W. Williams, J. Kent Stewart and Bernard Campbell*

Club Aventure.

Adventure travel in Canada has become one of the nation's fastest growing segments of the outdoor tourism market. Businesses offering travel packages have tripled in the past decade (Tourism Canada, 1993a). This situation is particularly pronounced in Western Canada where there has been a virtual explosion in the development of organizations offering adventure products and services to a growing number of domestic and international visitors (Tourism Research Group, 1992).

With its renowned natural and cultural resource base, Western Canada is well positioned to capitalize on the growing demand for adventure travel. However there are numerous challenges to address before this opportunity can be fully realized. Not the least of these issues relates to understanding the characteristics of the industry, as well as the nature of its markets and product requirements (Reid and Smith, 1993). With this intelligence, the chances of strategically developing and marketing a truly competitive adventure travel product in Western Canada will be increased substantially.

Adventure Travel : From Concept to Definition

What is offered as adventure tourism in many parts of Western Canada has been variously described in the academic and professional literature as a curious and often confusing combination of outdoor recreation, ecotourism, and nature based travel (Maclaren Plansearch and al., 1988). Often little rationale exists for decisions on the *labeling* of these travel experiences (Robbins, 1993). Recently, studies have suggested classifying adventure tourism products into as many as seven product categories (e.g. travel involving specific types of activities, geographic regions, learning experiences, etc.) with up to 21 different product dimensions (e.g. specific motivations, skill and technological requirements, travel party and cost characteristics) (Dube, 1994). While such approaches provide a potentially more systematic and focused basis for strategically managing the development of the industry as a whole, there is a real concern that many

* Mr. Peter W. Williams is Director of The Centre for Tourism Policy and Research at Simon Fraser University, in Burnaby, British Columbia. Mr. J. Kent Stewart is a management consultant specializing in strategic planning and management for the tourism industry. He is a principal in The Strategy Group. Mr. Bernard F. Campbell is a management consultant specializing in strategic tourism development. He is a principal in The Strategy Group.

of these product typologies lack an operational focus for most industry businesses and potential markets.

For the purposes of this paper, the definitions used by the Adventure Travel Society and Tourism Canada will be applied. This is :

> *[...] an outdoor leisure activity that takes place in an unusual, exotic, remote or wilderness destination, involves some form of transportation, and tends to be associated with high level of activity from which individuals draw personal satisfaction from some unusual sight, activity or accomplishment. (Tourism Canada, 1993a)*

There is obvious subjectivity with respect to what is or is not included with this definition. Adventure activities may range from those which are extremely rigorous (e.g. mountain climbing) to those which are less physically demanding (e.g. river rafting). Operators frequently differentiate between *hard* and *soft* adventure based on such factors as geographical focus and physical skill requirements) but these distinctions are often a matter of personal interpretation... Similarly, inclusion of some resource consumptive pursuits such as hunting and fishing creates considerable controversy amongst industry analysts[1].

As many as twelve different activity based adventure tourism product types have been identified in Western Canada (Tourism Canada, 1993b). Each has its own market and resource requirements. The critical point is that it is difficult to generalize about the characteristics of adventure tourism, given its wide ranging inclusions. Nonetheless, there are some commonalties which characterize the current status and future challenges of the industry from marketing and product development perspectives.

Industry Characteristics

While growing rapidly (approximately 15 % annually over the past 5 years), adventure tourism is small in terms of both number of operators and contributions to the region's revenues (Tourism Canada, 1993a). Past research suggests that there are approximately 360 adventures operators in Western Canada, contributing between 2 % and 5 % of the region's total tourism revenues (Alberta Tourism, 1992). On an individual business basis, the economic performance of these operations is spotty - some companies are doing exceptionally well, while many survive from season to season or trip to trip (Tourism Research Group, 1992). With the exception of British Columbia, which offers a full range of adventure products, one or two activities dominate the product lines of adventure tourism in Western Canada. For instance, canoeing and river rafting are the hallmark product lines in Yukon, while trail riding and guest ranch visiting are premier adventure products in Alberta (Table 1). This description focuses primarily adventure businesses primarily suited to serving long haul travel markets.

In combination, these businesses comprise an estimated 65 % of all adventure tourism businesses in Canada. Over the years they have managed to position Western Canada as the adventure travel destination of choice for a good proportion of the nation's long haul travel markets (Tourism Canada Long Haul Pleasure Travel Market Studies, 1986-1991, U.S. Pleasure Travel Study, 1991). However, despite their relatively recent and growing significance they face many challenges from a marketing and product development perspective.

Most adventure operations in Western Canada can be characterized as small, poorly capitalized, locally focused, seasonal businesses, experiencing high levels of business and labour turnover. While intrigued with catering to potentially lucrative international and other long haul travel segments, for the most part their exposure and success with such markets is limited. They generally do not have the comprehensive product offerings on-site suited to meeting the ever increasing demands of the marketplace. Similarly, few have marketing alliances which give them a clear presence in international marketplaces.

In combination, these traits describe a relatively young and immature industry which requires substantial structural enhancement for it to survive and flourish in the international marketplace. In recent years a few larger companies have emerged, and this has forced some rationalization and cooperative activity amongst a small but growing number of adventure tourism operators (Wild, 1993). The success of these initiatives has catalyzed a new level of energy and commitment to creating a truly competitive and export ready adventure travel industry for Western Canada.

Marketing Issues and Strategies

While the market for adventure travel in Western Canada is developing rapidly, there are some strategic marketing issues which must be addressed in order for the industry to realize its full potential. These issues relate to research and integrated marketing.

Research

Penetration into international markets by adventure suppliers is currently relatively low. Sectorally based industry research suggests that perhaps only nature observation, heli-skiing and heli-hiking attract more than half of their visitors from American and overseas origins (Tourism Canada, 1993). Furthermore, operator appreciation of the requirements of those markets with respect to such factors as trip planning, product preference, packaging, activity programming characteristics and sales distribution channels is often limited to haphazard personal exposure to visitor comments. This makes development of long haul markets for Western Canada's operators problematic, at best.

Critical to a greater and more sustainable market development is a fuller understanding of the size and behaviour of potential markets, how they can be attracted, and what must be done to ensure their adventure travel expectations are met. While recent work in this area for some key origin markets for Canada has been conducted, more detailed work is needed to clearly understand the critical combinations of product attributes and benefits that these markets are seeking. This perspective is based on the belief that benefits which people seek in consuming a given product are the basic reasons for the existence of market segments and are better determinants of behavior than are other approaches (Loker and Perdue, 1992). Findings emanating from benefit segmentation research by others (Dybka, 1987; Shoemaker, 1989) clearly supports this position.

In the case of adventure tourism, it is important to recognize that the operators are not experts in market research and analysis. They are experts in delivering

TABLE 1
Estimated range, number and geographic distribution of adventure tourism operations in Western Canada

Activity	British Columbia	Alberta	Saskatchewan	Yukon	Overall
Nature/Photo Safaris	27	9	2	22	60
Canoe/Kayak	11	4	37	22	74
Bicycle	2	4	9	2	17
Snowmobile/Dogsledding	3	1	2	16	22
Snowshoeing/Ski Treking	3	4	1	5	13
Hiking/Backpacking	9	11	2	25	47
Sailing	19	1	1	5	26
Rafting	9	1	0	12	22
Pack/Wagon Trips	13	30	1	8	52
Mountaineering/Climbing	3	7	0	3	13
Heli Skiing/Hiking	6	3	0	1	10
Scuba	2	0	0	0	2
TOTAL:	107	75	55	121	358

Source: Tourism Canada, 1993a.

product lines in which they have developed specialization. In most cases, they are able to adjust some dimensions of their product offerings (e.g. accommodation, food requirements, physical activity requirements) to the on-site needs of a variety of markets as long as they are aware of the customer's requirements. Intuition suggests that there may be wide gaps in the benefits and product attributes sought by mountain climbers and trekkers as opposed to bird watchers and nature photographers. However, if operators are not aware of these distinctions it is difficult for them to adjust their product appropriately.

As an example adventure travelers from West Germany tend to fall into two different segments (nature/culture and outdoors sports). The culture/nature group represent about 17 % of the country's long haul travelers. They are particularly interested in experiencing rurally based community life and its cultural artifacts as part of their comparatively *soft* adventure travel to natural areas. Conversely, outdoor/sport adventure enthusiasts comprise 10 % of the overall West German travel market. They tend to be more interested in pursuing *physically testing* wilderness and outdoor pursuits. While both represent significant adventure travel segments from the same country, they have distinctive product requirements. Adventure travel operators failing to recognize these differences have a serious disadvantage when attempting to provide a first class adventure experience which matches with the needs of the marketplace (Table 2).

In a domestic context, Causal, Committed and Expert adventurers have been identified, each with their own distinctive traits (Angus Reid, 1992). Similarly, United States adventure travellers have been categorized as Outdoor Recreation, Resort and Nature/Culture travellers (Tourism Canada, 1990). All of these adventure travel segments express varying degrees of interest in Western Canada destinations.

This information is good general knowledge for adventure travel operators to understand, but it is often too generalized for more than cursory use. In most cases it does not lead them to specific product or market refinement responses.

The industry requires benefit and attribute research which clearly defines not only what the specific product requirements of each adventure travel market segment are, but also the areas where these requirements overlap with those of other adventure travel market segments... Armed with such intelligence it will then be in a more practical position to discern the potential for cooperative or consortia relationships between complementary industry partners in delivering the product required. This has already happened to a large extent within Canada's ski industry, through its benefits-based approach to research (Williams and Basford, 1992).

Cooperative Marketing

Western Canada's adventure tourism proponents express considerable optimism about the growth potential of European long haul markets in particular. The vast expanses of relatively uninhabited, unspoiled wilderness are of great appeal to Europeans whose landscape has been tamed for centuries. Origin markets from Germany, the United Kingdom, and France exhibit particularly strong affinities for adventure travel. Together, these markets generate in excess of 1.3 million outbound adventure travel trips annually. However, the reality is that Canada currently captures only a small portion of these trips.

Many adventure travel operators in Western Canada have strong *family ties* with Europe. As a consequence, they have tended to market their products and services back to these country origins. For the most part their efforts have been promising but not particularly dramatic. This is largely because on an individual basis, most of them have only limited financial capacity to effectively market beyond their home region on an on-going basis. This constraint is particularly challenging, since it is generally accepted that the European market is extremely difficult to penetrate, without a sustained and comprehensive strategy. Notwithstanding this situation, Europe exhibits considerable potential in terms of its ability to generate longer stays, considerable destination and product loyalty, and significantly higher revenues for adventure operators. German visitation in Alberta alone approximated 90,000 person visits in 1993, an estimated growth of 30 % in a single year (Alberta Economic Development and Tourism, 1994).

The overriding challenge for Western Canada's adventure tourism industry is to penetrate the European market in a concerted and coordinated fashion. This can not be done on a piecemeal basis, yet adventure tourism operators in Western Canada have no formal organization of their own to execute this task. While sector specific associations exist (e.g. River Rafting, Guides and Outfitters, Trail Riding, etc.), there is no all encompassing organization which facilitates the sharing of marketing information, assists in the development of new products, encourages all inclusive product development or strategic marketing initiatives amongst complementary and non-competing businesses.

Coincidentally, little integration exists within most of the specific adventure tourism sector either. Only a few relatively recent integrated marketing programs have been conducted by a select group of package and ground operators. As in other jurisdictions, they are just beginning to recognize the market demand for multi-activity or catalogue type group or FIT tour programs. The industry must encourage the development of strategic alliances amongst its own members and government partners. It is only through this approach that the necessary marketing and financial resources can be leveraged to allow the industry to become a prominent force in the long haul pleasure travel markets of Europe and elsewhere.

TABLE 2
Adventure long haul pleasure traveller characteristics: West Germany, 1989

CULTURE AND NATURE	OUTDOOR SPORTS
Primary Benefit Adventure	**Primary Benefit** Adventure
Market Share and Size 17 % of long haul travel	**Market Share and Size** 10 % of long haul travel
Travel Philosophy Guarded independent Affirmed package	**Travel Philosophy** Enthusiastic independent
Preferred Product Attributes Historic sites/cities Museums/galleries Different cultures Sightseeing smaller towns and villages Outstanding scenery Wide open spaces Wildlife nature	**Preferred Product Attributes** Campgrounds/trailer parks Fishing/hunting Wildlife Wilderness/nature National parks Outstanding scenery Outdoor activities
Demographic Profile Females (51 %) Younger (18-34) Single Upscale	**Demographic Profile** Males (68 %) Younger (under 35) Single

Source: Pleasure Travel Markets to North America: West Germany, 1989, ISTC-Tourism, October, 1989.

Product Issues and Strategies

The strategic challenges associated with building adventure tourism in Western Canada are linked closely to issues of natural resource protection, product diversification, and human resource development.

Natural Resource Protection

Western Canada is particularly endowed with the natural resources needed to form the critical *core* of an internationally competitive set of adventure travel products. Its outstanding scenery e.g. mountains, rivers and lakes, coastlines and tundra, wildlife population and pristine wilderness afford a strong base for product development. The existence and growth of the adventure travel industry is critically linked to the maintenance and integrity of this resource base (ARA et al., 1991).

Domestic and international markets recognize Western Canada's natural resource base as an asset of appreciating value. They are prepared to pay handsomely for the opportunity to experience it. Daily rates for the less exotic adventure excursions (e.g. rafting, canoeing, cycling, mountain biking, trail riding, and hiking excursions) are not onerous and average in the range of $100 per day. More unusual adventure tourism experiences (e.g. guided photography or painting, mountain climbing, helihiking trips to particularly remote locations, etc.), can cost as much as $1,000 per day. Typically, these trips are exclusive of transportation to the point of the on-site excursion.

However, Western Canada's competitive natural resource advantage is vulnerable to a variety of challenges. Adventure tourism is inscreasingly faced with issues of resource scarcity, security, and competition (ARA, 1993). From an internal perspective, the adventure tourism operators must take concerted steps to protect the natural environment and practice sustainable resource use (Hawkes and Williams, 1993). Externally, the adventure tourism industry as a whole must play a stronger role in guiding provincial and federal governments toward fair and equitable solutions to sharing and conserving Western Canada's natural resources. Promising strides have commenced in that direction through the creation of such organizations as British Columbia's Council of Tourism Associations (which includes adventure tourism representation). This advocacy organization provides focused policy inputs into government based integrated strategic land use planning processes, commercial back country recreation policies, protected areas strategies, and forest practices codes, that are now being formulated in British Columbia.

Product Integration

While Western Canada's adventure tourism product core (the natural resource base) is particularly strong, the all important peripherals that produce the value-added necessary to bring travelers to the region are as yet not fully developed or understood. In general terms these include top quality accommodation facilities, reliable transportation equipment, as well as nature and culture based travel packages and programs.

Currently, Western Canada's adventure tourism products lack the diversity and comprehensiveness needed to effectively serve most long haul markets. This is largely due to a curious mix of individual entrepreneurialism (which keeps many operators focused on their own product out of a love for that activity to the exclusion of broader interests), a limited appreciation of the wide range of facilities and services required to compete effectively at an international level, and a relatively early stage in the evolution of the sector.

Most operators are focused on the day to day operation of their own businesses. As such, they are unlikely to form consortia with other operators unless there are very compelling reasons. Appealing rationales include enhanced abilities to expand the range of product offerings available, penetrate larger and growing markets on a more sustained basis, share marketing and sales costs, as well as expand and stabilize business revenues without significantly greater financial commitments.

A particularly promising application of integrated product development currently evolving in Western Canada involves the creation of *adventure tourism destination regions*. Examples of these include Whistler, B.C., and to a more limited extent Banff and Kananaskis Country in Alberta. These destinations are gradually building a very diversified range of adventure travel product lines. Using the notion of *base camping* (Rubin and Gorman, 1993) as the fundamental integrating strategy, these destinations provide a full range of amenities and facilities typically sought by resort users, but package a wide spectrum of adventure experiences with the *base camp* offerings. Particularly unique adventure tourism components are provided by specialized adventure tourism operators working in conjunction with the adventure destination base camp. They are linked together via integrated reservation systems and cooperative marketing agreements (WRA, 1994). Customers perceive the resort destination as being managed by a single entity, but in actual fact it is operated by a consortia of specialized companies working with a common commitment to provide a full adventure tourism experience.

While such approaches to integrated product development are emerging in some parts of Western Canada, for the most part they are few in number and early in their evolution. A strategic opportunity exists to develop the *base camp* model in many parts of the region.

Initiatives proposed by some of the potential *integrator* organizations such as Western Economic Diversification or Canadian Heritage could foster further development of this model.

Product Diversification

While the *outdoors* component of adventure tourism is well recognized in Western Canada, significant opportunity exists to diversify product lines by capitalizing on the *softer* dimensions of adventure travel. A growing proportion of long haul adventure travellers express an interest in incorporating a cultural component into their experiences (Tourism British Columbia, 1992). This can be done through the development of sensitive interpretation of ethnic and aboriginal cultures. An emerging opportunity of particular note involves linkages with aboriginal tourism operators. The richness of Western Canada's aboriginal culture and its strong links to the wilderness landscape where so much of adventure tourism occurs affords exciting potential for integrating *soft* dimensions of adventure into the regions product portfolio. In B.C. alone numerous native groups, have developed in excess of 182 different aboriginal tourism businesses (Johnston, 1993).

First Nations people in Western Canada are working diligently to develop both adventure tourism products and services suited to the creation of a fuller adventure travel experience. The Canadian National Aboriginal Tourism Association, a newly formed association of aboriginal tourism operators, is attempting to expand the range and quality of aboriginal tourism products. They are particularly focusing on development activities which respect the dignity of First Nations People (CNATA, 1993). Their efforts hold promise for additional authentic cultural products complementary to adventure tourism.

Human Resource Development

Human resource development has traditionally not been the watchword of the adventure tourism industry in Western Canada. The majority of employees are seasonal and are drawn to their jobs by their love for the activity. The concept of investing in the training of such employees, beyond the basics has not been a top priority for most operations. This is largely because of the limited amount of time and resources available for such activities, and the perceived risk that such investments would be lost in the annual turnover of seasonal employees.

However, as the adventure travel industry continues to grow, so will the need for more professionalism in the delivery of the travel product (Mitchell, 1992). Pushed by the demands of ever more sophisticated and experienced customers, safety and liability insurance concerns, and growing consumer awareness of environmental issues, adventure tourism operators will of necessity be forced to become proactive in the development of their employees. As a group they will have to clearly identify the range of skills and competencies that current and new entrants to the industry should have in order to become proficient employees (Glencross, 1993). Furthermore they will have to actively pursue cost efficient and timely means of delivering such training and education programs. Already these strategies are beginning to emerge through the development of occupational standards for outdoor guides (TISCC, 1993) and college based adventure tourism programs (Youds, 1994).

The rationale for these initial training initiatives is to develop personnel with targeted occupational capabilities that are transferable across a range of adventure tourism operations. In this manner those employees who fail to remain with a particular operation in succeeding seasons, may work within the sector at other locations, thereby still contributing to the overall quality of service and professionalism of the adventure tourism industry.

Conclusions

Adventure tourism in Western Canada exhibits considerable potential as a contributor to the region's economic, social and cultural fabric. Currently it is characterized as being primarily managed in an entrepreneurial mode by many small lifestyle operators, who want to pursue their own product specific adventure activities. For the most part the industry's success in recent years has been based on its ability to capitalize on the region's world class natural heritage. While it has been able to capture a portion of the expanding world demand for adventure tourism, its future growth and competitiveness will be dependent to a very large extent on how well it is able to harness the combined ingenuity and resources of its members. This cooperation and integration will be needed to adequately address several emerging and potentially critical product development and marketing issues (Wild, 1993). The adventure tourism industry's ability to meet these challenges will be predicated on a shift from a primarily entrepreneurial and individualistic mode of operation to a more structured and cooperative approach.

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(1) To correspond with the previously mentioned definition of adventure tourism, this paper excludes discussion of hunting and fishing adventure activities despite their very significant role as generators of tourism revenues in Western Canada (DPA 1991; DPA and Maclaren, 1988).