TOURISM PRODUCT DEVELOPMENT:

A CASE STUDY OF WILDLIFE VIEWING IN THE SQUAMISH VALLEY

by

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ABSTRACT

Wildlife viewing is an increasingly important form of tourism in British Columbia. Many communities recognize this and have therefore opted to develop wildlife viewing products in order to improve their economies. One location that is particularly well suited for wildlife viewing is the Squamish Valley. As part of an overall means for improving tourism in the Squamish Valley, the District of Squamish has expressed a desire to enhance wildlife viewing opportunities in the area.

The overall purpose of this study was to gain a better understanding of travel market needs and product development opportunities associated with wildlife viewing product development in British Columbia. The objectives of the research were twofold. First, this study attempted to gain a better understanding of wildlife viewers' needs through the analyses of the 1998 Canadian Travel Survey (CTS) and the 1995 Domestic Tourism Market Research Study (DTMRS). Findings indicated that there are many defining demographic, psychographic and behavioural characteristics of wildlife viewers that are important from a product development perspective. Based on these findings, several recommendations for communities interested in attracting wildlife viewers were made.

The second objective of this research was to use a case study to conduct a product-market match gap analysis so that recommendations for wildlife viewing product development could be made. Interviews with key stakeholders in the Squamish area were undertaken to determine both the nature of supply of wildlife viewing resources in the area and the community's understanding of market needs. Findings from the interviews were compared against the results of the analyses of the CTS and DTMRS in order to reveal product-market gaps. Several gaps were identified and recommendations for overcoming these gaps, as well as general product development recommendations, were made.

DEDICATION

This thesis is dedicated to the memories of loved ones who have passed on.

Granny, Gramps, Uncle J.D., Uncle Don, Uncle John,
you will always have a place in my heart.

Sparky, Murphy, Clyde, Tabby, Koko, Pirate and the rest,
I will always remember you.

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I would like to thank that little white dog (I will call him Snowball) at the end of the trail for making me laugh so hard. I hope our paths cross again.

All of my experiences would have been meaningless
if they were not shared with special people. I thank everyone who has
shared a special moment with me.

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CTS	Canadian Travel Survey
CV	Coefficient of Variation
DTMRS	Domestic Tourism Market Research Study
LFS	Labour Force Survey

CHAPTER ONE: INTRODUCTION

This chapter introduces the context and key research problems this study. The first section presents the background and rationale for the project. The following sections outline the purpose of the study, research questions and a brief description of research methods and organization of this paper.

1.1 BACKGROUND AND PROJECT RATIONALE

Canada, a country made up of diverse landscapes and ecosystems, is home to a plethora of unique creatures. Each year both domestic and international visitors flock to Canada to explore the country's vast, relatively unspoiled natural areas and to view the associated wildlife. British Columbia, the most biologically diverse province in Canada (Ethos Consulting et al., 1991; Rankin, 1991) is especially well suited for the wildlife viewing industry. In fact, many communities in the province are attempting to develop wildlife viewing as a tourism product in order to attract travellers and thereby improve their economies.

Squamish is one of the communities in BC attempting to promote itself as a global wildlife viewing destination. The annual winter Bald Eagle Festival has already caught the attention of wildlife enthusiasts from around the world, and the potential for Squamish to further develop wildlife viewing opportunities is well recognized. In fact, one of the objectives outlined in the community's 1994 *Tourism Development Plan* was to encourage wildlife viewing and interpretive activities. In addition, a subsequent study conducted in 2000 recommended that the development of wildlife viewing products should be encouraged in the Squamish area.

However, since understanding consumers is one of the keys to success in the tourism industry (Goeldner at al., 2000), and since the demand for tourism is dynamic, tourism providers in Squamish and elsewhere need to actively identify their visitors. They should continually reassess travellers' activities and preferences so that they can develop products that match the markets' needs (Godfrey and Clarke, 2000). Unfortunately, most of the research related to the nature of demand for wildlife viewing in BC is either out of date or is not comprehensive with respect to informing product development and investment decisions. The first objective of this study is therefore to shed some light on the current nature of demand for wildlife viewing in Canada so that destinations may more effectively develop their products to meet the demands of viewers.

Once destinations understand the characteristics of demand for their current or potential target markets, they need to identify the supply of tourism products that attempt to meet demand (Brass, 1997). It is important to identify relevant supply for many reasons. Evaluating tourism supply can expose weak links in services, which can help destinations to establish development priorities (Godfrey and Clarke, 2000). Additionally, tourism managers need to know if supply is saturated in time or space, since this could produce a wide range of negative impacts that could arise from the overloading of facilities (Coccossis and Parpairis, 2000). Furthermore, and most pertinent to this study, destinations need to evaluate their products so that they can identify any gaps between the supply of and demand for wildlife viewing products (Godfrey and Clarke, 2000). If demand far exceeds supply, or if their products are inappropriate based on demand analysis, measures should be taken to alter the wildlife viewing experience offered so that the industry remains sustainable.

There is currently little literature related to the analysis of gaps between supply and demand for wildlife viewing products in BC. However, communities attempting to expand their tourism initiatives need to undertake gap analyses to reveal whether their current products meet the demands of wildlife viewers and to determine product development opportunities. The second objective of this study is therefore to conduct a gap analysis for Squamish, BC, so that recommendations for the development of suitable wildlife viewing products could be made for that community.

While this study should be useful not only to stakeholders in the tourism industry in the case study area, it should also help other destinations in the province. Specifically, tourism planners may be able to follow the methods used in this study to conduct other gap analyses for particular types of tourism in their own community. Furthermore, this study’s analysis of the demand for wildlife viewing presents information that may be useful for destinations that currently provide or plan to develop wildlife viewing opportunities in the near future.

1.2 PURPOSE OF STUDY

The overall purpose of this study is to gain a better understanding of travel market needs and opportunities associated with wildlife viewing product development in British Columbia. The specific objectives of this research are to gain insights into the nature of demand for wildlife viewing in the province and to use a case study to conduct a product-market match gap analysis so that recommendations for wildlife viewing product development could be made.

1.3 RESEARCH QUESTIONS

In the context of better understanding travel market needs and wildlife viewing product development, the research questions addressed are:

1. What are some of the key characteristics of demand for wildlife viewing, based on a literature review and analyses of current market data?
2. What are some of the critical elements of wildlife viewing product development from a demand perspective?
3. What is the current product-market match for the wildlife viewing industry in Squamish, BC, given the most recent demand characteristics?
4. How might Squamish better prepare itself to meet the demands of present and future wildlife viewers?
5. What lessons from this study can be applied to other communities in the province?

1.4 METHODS

Both primary and secondary research techniques were used to address the research questions. Three main methods were employed:

Method One: Literature Review

An analysis of relevant literature provided the context and rationale necessary for this study. Specifically, it presented the information needed for analyzing data on the demand for wildlife viewing and to develop criteria for conducting a gap analysis in the case study area.

Method Two: Data Analysis

Data from two different surveys were analyzed in order to provide information about the nature of demand for wildlife viewing. First, the 1998 Canadian Travel Survey (CTS) was examined to reveal the socio-demographic and activity characteristics of this market segment. Next, the 1995 Domestic Travel Survey was analyzed in order to illustrate some of the motivations and preferences of wildlife viewers.

Method Three: Case Study

Based on the findings of the literature review, a case study was conducted. It evaluated the development of wildlife viewing products in the context of a demand-supply gap analysis in the District of Squamish.

1.5 REPORT ORGANIZATION

This document is divided into seven chapters. Chapter One presents the context and rationale for the study, the purpose of the study, research questions, and a brief description of the research methods used in this study. Chapter Two gives a review of the literature that is relevant to determining the nature of demand for and supply of wildlife viewing opportunities in the province, and for conducting a gap analysis. Chapter Three presents a more complete description of the research methods used to collect, analyze and interpret the data pertinent to this study. Chapter Four describes the first half of the research findings. Specifically, the results from the analyses of the 1998 Canadian Travel and 1995 Domestic Travel Surveys are presented. The fifth chapter contains the findings from the case study, focusing on the results of the product-market gap analysis for Squamish, BC. Chapter Six outlines some of the key management implications based on the research findings. Priorities for wildlife viewing product development for BC are discussed in this chapter and recommendations for overcoming gaps found during the case study are discussed. Finally, Chapter Seven presents the overall conclusions from this study and suggests topics that would benefit from further research.

CHAPTER TWO: LITERATURE REVIEW

This chapter reviews the background literature necessary for analyzing the demand for wildlife viewing and conducting a gap analysis in the case study area. The first section describes wildlife viewing in British Columbia. Some key definitions and characteristics are discussed, and trends in demand are examined. The next section defines tourism products in a wildlife viewing context. The third section outlines the rationale and methods used for analyzing demand and supply in a tourism framework. The final section reviews the concepts of product development, differentiation and positioning as they apply to wildlife viewing, and presents the concept of a product-market match gap analysis.

2.1 WILDLIFE VIEWING IN BRITISH COLUMBIA: AN INTRODUCTION

2.1.1 COMMUNITIES AND WILDLIFE VIEWING DEVELOPMENT

Economic, Social and Environmental Benefits

Expanding the wildlife viewing industry in British Columbia may lead to many economic, social and environmental benefits at the community level. It has been recommended as a viable form of development in many communities (Watchable Wildlife, 2001). For instance, the link between nature as an attraction and economic impact can be quite substantial (McCool, 1999). For example, the Brant Wildlife Festival brought in $420,000 in revenues to Parksville and Qualicum Beach in each of 1993 and 1994 (ARA Consulting Group, 2001). Not only can wildlife viewing result in the production of foreign exchange in a community, but it can also help to diversify local economies (Shackley, 1996). From a social perspective, wildlife viewing development may also enhance the quality of life in a community. For example, the improvements to local infrastructure and superstructure could benefit local residents (Shackley, 1996). Residents could also take advantage of the recreation opportunities created by the wildlife viewing industry. From an environmental standpoint, successful wildlife viewing development can provide the economic argument for the protection of species and their habitats. Additionally, through wildlife viewing programs, residents and visitors can be educated about specific environmental issues in the host community (Ryel and Grasse, 1991). Education can help to encourage ethical responsibilities and behaviours by locals and tourists towards the natural environment (Norman et al., 1997).

Negative Impacts

Like all other forms of tourism, wildlife viewing has the potential to negatively affect the host destination, thereby jeopardizing the sustainability of the industry and its supporting environment. Sustainability involves living and managing our activities in a way that balance social, economic and environmental considerations to meet our needs, as well as the needs of future generations (Fraser Basin Council, 1997). However, increasing numbers of wildlife viewers to a community and the associated need for the expansion of tourism infrastructure can place numerous stresses upon ecosystems as well as local social and economic systems. Wildlife viewing development could result in environmental degradation, resident-visitor conflicts, inappropriate tourism development, and numerous other negative impacts in a destination.

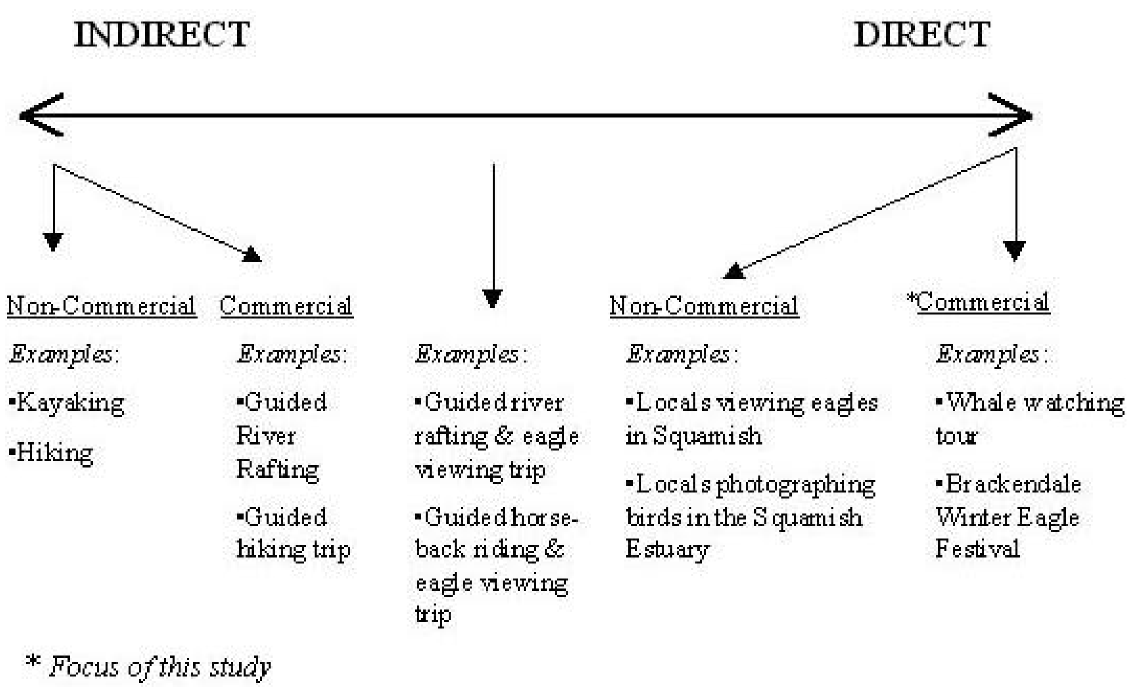
Destinations can avoid, or at least minimize, some of the negative environmental, economic and social impacts by developing wildlife viewing products that meet the needs of wildlife viewers and surrounding communities. When supply does not match demand, economic efficiency is lost, unnecessary development can degrade the environment, and tourist satisfaction can decline. The main purpose of this literature review is to provide the information necessary for analyzing demand in a wildlife viewing context, and for conducting a gap analysis to assess product-market matches in this industry in general, and in the District of Squamish in particular. Some key definitions related to the wildlife viewing product are discussed first.

2.1.2 KEY DEFINITIONS

Direct vs. Indirect Wildlife Viewing

From product development and management perspectives, it is important to identify the two main forms of wildlife viewing: direct and indirect. These types of wildlife viewing can be placed in a spectrum, as shown in Figure 2.1. Indirect wildlife viewing, the more common of the two, can be defined as outdoor activities that have primary purposes other than that of encountering wildlife (Federal-Provincial Task Force, 1993). These activities, which can include hiking, camping and boating, usually depend upon an attractive natural setting and can be enhanced by wildlife encounters (HLA Consultants and ARA Consulting Group, 1995). A river rafting outfitter, for example, may use images or descriptions of wildlife that can be seen from rafts in order to attract potential customers; however, the rafting trip is the primary attraction. Some tourism businesses, such as accommodation providers, may be located in close proximity to wildlife-rich habitat (Reynolds and Braithwaite, 2001), and may use this attribute to enhance the perceived attractiveness of their site to tourists.

Figure 2.1 Spectrum of Indirect to Direct Wildlife Viewing



Direct wildlife viewing, on the other hand, can be defined as trips that have the primary purpose of watching, studying, photographing and/or feeding wildlife (Federal-Provincial Task Force, 1993). Some businesses, such as whale watching outfitters, focus exclusively on direct wildlife viewing. Others include this activity in their mix of tourism products offered and therefore fall somewhere along the middle of the spectrum shown in Figure 2.1. For instance, a nature-based tourism outfitter might separately offer hiking trips (indirect wildlife viewing) as well as bird watching expeditions (direct wildlife viewing). Some forms of direct wildlife viewing are species-specific, where outfitters offer opportunities to view one or a few wildlife species. Others are habitat-specific and may involve tours that take place in areas rich with wildlife (Reynolds and Braithwaite, 2001).

Commercial vs Non-Commercial Wildlife Viewing

Direct wildlife viewing can be divided into commercial and non-commercial categories. Non-commercial wildlife viewing occurs when residents view species near their location of residence at no charge to them. This type of wildlife viewing is not considered part of the tourism industry because the residents do not travel far enough nor stay overnight to count as tourists[1]. In British Columbia, a tourist is anyone who stays overnight away from home and/or who takes a same-day trip of 60 kilometres or more (Hillan, 1997). Therefore, a resident of Vancouver viewing waterfowl at Stanley Park is an example of non-commercial wildlife viewing.

Commercial wildlife viewing, on the other hand, is considered a key element of the tourism industry in some regions. Residents and international commercial wildlife viewers travel far enough and/or stay overnight and therefore are considered part of the tourism market (Ethos Consulting et al., 1991). For example, a Vancouver resident making a sixty-three kilometre same-day trip to the Squamish Valley to view eagles is considered a tourist and is therefore part of Squamish's commercial wildlife viewing industry.

[1] Statistics Canada and other Canadian publications state that in order for a visit to count in the tourism industry, the tourist must either stay overnight away from home and/or travel a one-way distance from home of 80 kilometres or more (Statistics Canada, 1997).

Wildlife Viewing Zones

Ethos Consulting et al. (1991) explain that wildlife viewing takes place in four zones: urban, frontcountry, midcountry and backcountry. Urban wildlife viewing, which takes place in and around major metropolitan areas, is of little significance for commercial wildlife viewing. The frontcountry zone is characterized by easy access, proximity to populated areas, and the ability to attract and accommodate large volumes of tourists and has the potential to bring in sizeable revenues (Ethos Consulting et al., 1991). The zone is usually comprised of ecologically productive areas in which waterfowl, spawning salmon, birds of prey and other associated species can be viewed (Ethos Consulting et al., 1991). The majority of wildlife viewing done in Squamish, the case study area for this project, occurs in the frontcountry zone where Bald Eagles feed on spawning salmon.

Ethos Consulting et al. (1991) point out that midcountry and backcountry viewing takes place in areas that have not been substantially altered by humans. Midcountry areas are accessed by gravel or dirt roads, while backcountry lacks such infrastructure. Backcountry wildlife viewing often requires the assistance of a guide or outfitter (Ethos Consulting et al., 1991).

2.1.3 SUPPLY OF WILDLIFE VIEWING RESOURCES IN BRITISH COLUMBIA

The Natural Environment

British Columbia is a particularly attractive location for wildlife viewing. The province is blessed with high quality wildlife viewing resources, including a diversity of ecosystems, wildlife species, and natural landscapes, as well as clean air and water. All of these attributes contribute to the province’s position as an internationally renowned destination (ARA Consulting Group, 1993). In fact, BC is the most biologically diverse province in Canada, having over 70 percent of all bird and mammal species that breed in the country (Wildlife Branch, 2001; Ethos Consulting et al., 1991). As well, BC has more large mammal species than any other province or state in North America. It has the greatest number of bird and mammal species living exclusively in one province (Wildlife Branch, 2001; JS Peepre and Associates, 1994; Ethos Consulting et al., 1991; Rankin, 1991). These factors comprise the province's main comparative advantage over many other tourism destinations in North America (Master of Natural Resources Management Program, 1990).

Some communities in BC have already realized the benefits that can be accrued from the wildlife viewing industry. Wildlife viewing generates significant economic benefits to many British Columbians (Mol, 2001). Since many of BC's communities are well endowed with high quality natural environments and abundant wildlife, they have recognized the potential for the development or substantial expansion of commercial wildlife viewing (Ethos Consulting et al., 1991). However, in order to develop this industry, communities need to have a good understanding of the product that wildlife viewers are seeking.

2.1.4 MAJOR TRENDS IN DEMAND FOR WILDLIFE VIEWING

Worldwide

Worldwide, wildlife viewing is an activity of increasing popularity, and in some countries, such as Kenya, it is the principal foreign exchange producer (Reynolds and Braithwaite, 2001). Shackley (1996) estimated that by the mid 1990's, nature-based tourism (tourism that consists of both direct and indirect wildlife viewing) had an annual growth rate of 20 percent.

In North America, wildlife viewing is one of the fastest growing activities (Mol, 2001). In the United States, the number of people that traveled to observe, photograph, or feed wildlife increased from 22.9 to 27.5 million from 1980 to 1990 (Flather and Cordell, 1995). Bird watching alone grew by 155.2 percent from 1982 to 1995, making it the fastest-growing outdoor activity in the United States during that time period (Hammitt and Cole, 1998). In 1994/1995, approximately 31 percent of the American population participated in wildlife viewing, taking an average of almost 11 trips during that time period (Cordell et al., 1997).

An example of the growth of wildlife viewing comes from the whale watching industry. Orams suggested that in the early 1980s there were approximately a dozen countries that hosted commercial whale-watching activities. By 1999, 295 communities in over 65 countries hosted whale watching. Orams estimated that the number of operators in the industry during the 1990's increased by around 10 per cent per year (Orams, 1999).

Canada

The demand for wildlife viewing in Canada is also increasing. Studies such as *The Importance of Wildlife to Canadians* (Federal-Provincial Task Force, 1993) and *The Importance of Nature to Canadians* (Federal-Provincial Task Force, 2000) indicate that there is a significant demand for wildlife viewing in Canada. ARA Consulting Group (2001) calculated that the total size of the potential wildlife viewing market in BC at almost 7.5 million visitors. Gauthier (1995) estimated that eighty-five percent of Canadians engaged in non-consumptive wildlife-related activities, such as watching, photographing, feeding, and studying wildlife. Ethos Consulting et al. (1991) specified that while about 20 percent of Canadians undertook trips for the primary purpose of wildlife viewing, another 44 percent participated in non-hunting, wildlife-related activities during trips for purposes other than direct wildlife viewing. In 1991, approximately nineteen percent of the Canadian population spent an estimated \$2.4 billion on primary non-consumptive wildlife-related trips. On average, participants spent \$619 for yearly expenditures on primary wildlife viewing. This represented about \$28 per day of participation, with an average of 21.6 days spent engaged in the activity (Federal-Provincial Task Force, 1993). These figures clearly indicate that wildlife viewing is an important activity for many Canadians.

British Columbia

The situation in BC is similar. One study indicated that wildlife viewing had grown by 15 to 20 percent per year in the 1980's (Master of Natural Resources Management, 1990). Balmer estimated that in the early 1990's, secondary wildlife viewing had almost a 50 percent incidence rate among residents in BC. Wildlife viewing alone had about a 30 percent incidence rate. Both of these pursuits were expected to grow 14 percent faster than the population until the year 2003 (Balmer, 1994a). A 1996/1997 study concluded that over 77% of BC residents watched wildlife around their homes or cottages, 57% were involved in indirect wildlife viewing, and 29% undertook direct wildlife viewing trips (BC Ministry of the Environment, 1998). In those same years, approximately 107 million dollars was spent on indirect viewing activities, and 391 million dollars was expended on direct wildlife viewing (BC Ministry of the Environment, 1998). Additionally, over the last few years, several festivals associated with annual migrations of wildlife has been rising. Last year in British Columbia, a number of wildlife and nature-related festivals combined to create the Nature Festival Association of British Columbia (Malmgren, 2000).

While these studies shed some light on the demand for wildlife viewing, they do not give an in-depth look at viewers' characteristics. A study conducted by HLA Consultants and the ARA Consulting Group (1995) provided some detail on the demand for wildlife viewing in BC and Alberta, but the survey's sample size was too small to provide characteristics with statistical confidence. Other studies, such as a wildlife viewing market study done by Ethos Consulting et al. (1991), provided useful information about demand, but its findings may now be outdated.

Understanding consumers is a key to success in the tourism industry (Goeldner at al., 2000). Since the demand for tourism is dynamic, tourism providers need to actively identify their visitors and must continually reassess travellers' activities and preferences in order to ensure that appropriate development occurs (Godfrey and Clarke, 2000). This study addresses some of these information needs.

2.2 THE TOURISM PRODUCT DEFINED

There are several ways to define tourism products. In general, a product is any offering that can satisfy a need or want of consumers. It may consist of one or a combination of components, including physical goods, services, experiences, events, persons, places, properties, organizations, information and ideas (Kotler, 2001). A tourism product includes a combination of those components that contribute to the satisfaction of travellers.

Brass (1997) suggests that tourism products can be classified into two main components: attractions and facilities. Attractions are those natural and human-made features and events that stimulate people to visit a destination. For example, a bird sanctuary may act as the key attraction enticing avid naturalists to a destination. Facilities, on the other hand, provide necessities to both residents and tourists, and include roads, railway, airports, parking areas, hospitals, police, water and power services and accommodation[2] (Brass, 1997). Together, the mix of destination attractions and facilities create a set of intangible "subjective experiences" for tourists known as a tourism product (Tourism Research Group, 1992). For wildlife viewing, the product might be made up of attractions such as the opportunity to view unique species and a related festival, while the facilities they might use are the roads, informal restaurants, campgrounds and other basic services.

While the main component of the wildlife viewing product is generally the *experience*, other factors are important and may even serve as attractions for viewers. For example, *information* is often a component of the wildlife viewing product since many viewers seek education about the species and habitats being observed. Wildlife festivals and other *events* also can attract wildlife viewers and can therefore be considered an important part of the tourism product being offered. Additionally, through their interactions with customers, *persons*, such as guides and outfitters, can enhance or harm the experience. Their actions can have a profound impact on the quality of the tourism product (Keane, 1996). For instance, a wildlife viewing outfitter with a great sense of humour and a vast amount of wildlife-related knowledge could greatly enhance the wildlife viewing experience. *Organizations*, such as wildlife preservation societies, could also be part of the product.

Levitt effectively describes all these different components of a product in his total product concept. He suggests that there are four components of a product (Figure 2.2). The innermost core represents the generic product. This component is the rudimentary item (tangible or intangible) without which there would be no product (Levitt, 1983). For a direct wildlife viewing operator, the fauna may be the generic component of their total product. However, as Levitt points out, simply offering the generic product only allows a producer

[2] Some types of accommodation, such as an old country inn or a world-renowned resort, might fall under the category of an attraction as well since they might draw a tourist to the destination.

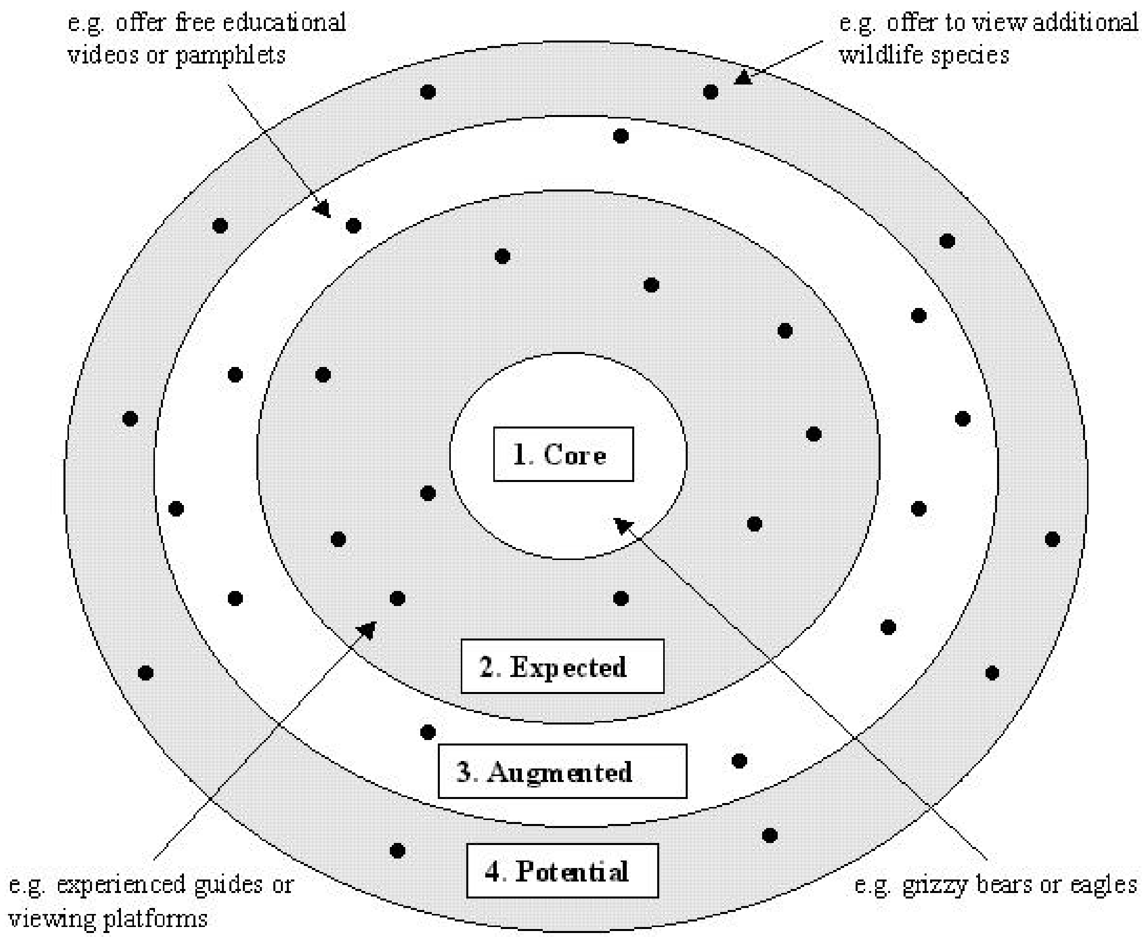
entrance into the marketplace. It in no way ensures success. First, customers' main expectations about that product must be met.

The *expected* component of Levitt's product concept represents customers' minimal expectations that exceed the generic product itself. The generic product cannot be sold unless those expectations are met (Levitt, 1983). These attributes of the expected product are represented by the dots in the expected component in Figure 2.2. For wildlife viewers, expected attributes could include viewing platforms, knowledgeable guides and a clean, natural environment, as well as certain types of accommodation, rest rooms and food services. These may represent minimum purchase conditions to some viewers. For example, even though a destination may have abundant and enticing wildlife (the generic component exists), viewers may not visit that area due to known and visible forest clear-cuts in the area (the expectation of a natural environment is not met).

McNeill categorizes these first two components (generic and expected) of Levitt's product concept as *hygiene factors*. These factors are variables of the product that are "must-haves". They do not motivate the sale of the product itself, but lack of them can "demotivate" the sale (McNeill, 1999). For instance, lack of a certain expected service, such as a campground, may "demotivate" wildlife viewers from choosing a destination they otherwise would have visited.

McNeill suggests that the remaining two components represent *motivational factors.* These factors are intended to match the features and benefits of a product to customers' needs and desires (McNeill, 1999). First, in order to gain an edge in the marketplace, destinations must look beyond the minimal expectations of a tourism product and explore how they might *augment* it. As Levitt explains, augmented product attributes are those offerings that go beyond what customers think they need or have become accustomed to expect.

Figure 2.2 Levitt's Total Product Concept



* *Note*: each dot represents attributes of the component. For instance, dots in the expected component could represent organized wildlife tours, signage and knowledgeable guides.

Source: Adapted from Levitt, 1983.

Augmentations can differentiate one product from another, and can give a competitive advantage to producers who effectively augment their products (Levitt, 1983). For a wildlife viewing destination, augmented product components could include free educational pamphlets or lectures about wildlife or offering viewing tours near a unique geological form. While many wildlife viewers may not expect these components, they may be motivated to visit a destination offering such augmentations over another destination that does not.

The final component of Figure 2.2 represents the *potential* attributes of the overall product. Levitt suggests that the potential product consists of everything that could potentially attract and hold potential customers. It depends not only on what could be done based on the knowledge of current customers and competitors, but also on changing conditions (Levitt, 1983). Shifts in the demographic or attitude patterns of wildlife viewers or changes in the global economy could result in the potential for a destination to develop a new feasible product.

Traditionally, strategic thinking in product development involved the domination of the generic category (Peters, 1988). However, while providing the generic product in conjunction with expected components is essential, successful producers need to expand the value of their offerings in the 3rd and 4th components of Levitt's product concept (McNeill, 1999). Value can be added by enhancing the *augmented* and *potential* rings. Destinations that differentiate their product by raising expectations and then raising performance to meet and exceed expectations will yield customer satisfaction and gain a competitive advantage (Peters, 1988).

In summation, the total wildlife viewing product is made up more than just the fauna that a destination has to offer. Several *expectations* need to be met in order for wildlife viewers to purchase the product by visiting a destination. Furthermore, destinations need to *augment* their product by exceeding expectations and by exploring and providing *potential* products in order to gain a competitive advantage.

2.3 PRODUCT DEVELOPMENT

Destinations need to have a good understanding of both demand and supply in order to identify wildlife viewing development opportunities. Understanding the characteristics of demand can help destinations to determine the expectations of wildlife viewers, suggest how products may be augmented, and may indicate whether there are any other potential products to be developed. Detailed knowledge regarding supply is needed so that destinations can determine if they are meeting the demands of wildlife viewers.

2.3.1 ANALYZING DEMAND

Kotler (2001) outlines the difference between consumers' needs, wants and demands. Needs are basic human requirements, such as food, air, water, clothing and shelter. He also classifies recreation, education and entertainment as needs. Needs become wants when they are focused on specific objects that could satisfy the needs. Wants become demands for specific products in a tourism context when a traveller has the ability to pay (Kotler, 2001).

Kotler's definitions can be applied to tourism. A consumer may consider recreation to be a *need*. That consumer *wants* to fulfil this need by travelling to a wildlife viewing destination. This want becomes a *demand* if this consumer has the ability to pay for wildlife viewing products. The following section outlines what is known about trends in demand for wildlife viewing.

Behavioural Research

Understanding demand through behavioural research is critical for developing appropriate wildlife viewing products. In tourism, such research "aims to fit the resources of a destination to the opportunities existing in the market" (Godfrey and Clarke, 2000, p. 125). For destinations, this means understanding the characteristics of current and potential travellers so that they can establish whether there is sufficient demand for new services and facilities and the types of services and facilities that should be developed (Briggs, 1997). Specifically, analyzing demand should reveal the current behaviours and *expectations* of wildlife viewers. It can help destinations enhance the *augmented* and *potential* components of their product.

Identifying Market Segments and Target Markets

A key step to understanding demand in a tourism context is to examine traveller markets (Godfrey and Clarke, 2000). Traveller market research reveals trends in the market that can be used for forecasting and outlines customer characteristics and motivations, which can help reduce some of the risk associated with making decisions (Proctor, 2000). This is especially important since traveller markets are becoming more heterogeneous and complex, and are constantly changing (Best, 2000). Knowing the characteristics of a particular group of tourists can help tourism destinations more effectively tailor and promote their products to meet the demands of the target market (Andereck and Caldwelll, 1994). Market segmentation is one method by which a destination can better understand its visitors.

Market segmentation in tourism involves the identification of homogeneous groups of travellers within a broader heterogeneous population (Andereck and Caldwell, 1994). By understanding market segments, an organization can create more fine-tuned products or services that are appropriate for their particular segment (Kotler, 2001). Some studies have attempted to gain a better understanding of the wildlife viewing segment (e.g. Martin, 1997; McFarlane and Boxall, 1996; McFarlane, 1996; McFarlane, 1994). Several different variables can be used to segment markets in tourism. Four overriding categories that shape the needs of consumers have been identified: demographic, psychographic, behavioural patterns and geographic (Kotler, 2001; Best, 2000; Guiltinan et al., 1997).

Demographic characteristics, such as income, age, sex, family, lifecycle, occupation and educational status, all contribute to differing sets of customer demands for a variety of products and services (Kotler, 2001; Best, 2000; Proctor, 2000). Younger wildlife viewers, for example, may demand more challenging excursions than elderly people. Previous studies suggest that wildlife viewers are relatively evenly split along gender lines (Shackely, 1996; HLA Consultants and the ARA Consulting Group, 1994), with slightly more males than females participating in the activity (Pam Wight and Associates, 1998). They are generally older, tend to be better educated than general tourists and have middle- to high-income levels (Wight, 1996; Pam Wight and Associates, 1998). However, demographics alone do not explain why customers behave the way they do (Dalrymple and Parsons, 2000). Psychographics and behaviour patterns should also be examined.

Psychographics examine the motives for travel behaviour (Weber, 1994). Psychographic characteristics are created by differences in values, attitudes and interests and contribute to differences in customer needs (Best, 2000). These variables primarily reflect the influence that social forces can have on the consumption process (Guiltinan et al., 1997). Consumers who are demographically the same may differ significantly in their attitudes and value orientation, which may result in differing needs (Best, 2000). For instance, some wildlife viewers may oppose animals being held in captivity. These viewers may therefore desire a product that allows them to visit animals in their natural environment, and may avoid zoos. A study of birders in Alberta by Bonita McFarlane in the mid-1990's found that the majority of birdwatchers motivation for participating in viewing activities was to appreciate unique birds and the outdoors for its beauty (reported in Scott, 1998).

The third variable that can be used to segment tourism markets is behaviour patterns. Behaviour patterns can reveal information such as how, when and how much of a product or service is used (Best, 2000; Proctor, 2000). In tourism, previous trip characteristics are often examined in order to determine probable future travel patterns. Additionally, such information can help to reveal the types of activity or travel preferences of wildlife viewers. Previous studies suggest that wildlife viewing is generally a more family-oriented activity (Pam Wight and Associates, 1998).

Finally, tourist markets can be segmented geographically. Such segmentations can reveal information about travellers' locations of origin and destination, and whether they are rural or urban (Guiltinan et al., 1997). This is important because product usage can differ geographically (Dalrymple and Parsons, 2000). For example, wildlife viewers visiting a warmer geographical area may prefer to camp, while others visiting a colder destination may wish to stay in more sheltered, roofed accommodations.

Since the total market for tourism is huge, it is more productive and cost-effective to identify several smaller groups of people with similar attributes (Briggs, 1997). The chosen segment becomes the 'target market' (Proctor, 2000). The goal of target marketing is to position a business/destination within a product market so that it gains a comparative advantage. This comparative advantage is gained when the business offers products with attributes that are both unique and important to the customer (Guiltinan et al., 1997).

To be useful, tourism markets need to be segmented by attributes that can apply to the product or service (Prentice, 1989). The first step in the market segmentation process is to group customers with like traits, and then discover which demographics, lifestyle forces and usage factors set them apart from other customers (Best, 2000). In this study, those tourists who indicated on the 1997 Canadian Travel Survey and the 1995 Domestic Tourism Market Research Study that they engaged in wildlife viewing are segmented from the general population. They are described with respect to their socio-demographic, psychographic and behavioural characteristics and are segmented geographically to reveal any characteristics that would be useful in planning for product development.

2.3.2 SUPPLY

Destinations need to have a good understanding of their supply of key product attributes in order to determine whether they are meeting the demands of current wildlife viewers. This will help them determine if they should alter or increase the number or types of wildlife viewing products that they offer (Godfrey and Clarke, 2000). In addition to creating an inventory of primary and secondary wildlife viewing opportunities, destinations need to address a number of questions (Table 2.1).

Table 2.1: Resource Inventory Questions

Category	Questions to be Asked
General	• What could a visitor see in the area that might be of interest? • What are the different types of attractions they could visit? • What types of services would they require? • What different activities could they do during their stay? • If staying overnight, what accommodation is available?
Natural	• What makes this resource unique to the area? • Is it common or readily available in other destinations? • How significant is it as an existing or potential attraction?
Cultural	• What makes the feature unique to the area? • Is there any cultural or social sensitivity? • How significant is the resource as an existing or potential attraction?
Events	• What makes the event unique? • Does it attract non-local participants? • Does it complement or compete with other local events? • What is the frequency of occurrence?
Activities	• How unique is the activity to the destination? • Does it attract non-local users?
Services	• For services, local directories usually already exist, therefore an inventory may require filling in a few extra details including name & location of service provider, contact information, and a general description of the service.

Source: adapted from Godfrey and Clarke (2000).

The features, advantages and benefits of a wildlife viewing operation ideally should meet the expectations of wildlife viewers and have the ability to augment the product. Features are physical characteristics of the product, advantages are offered by or included in the features, and benefits are what can be gained from those advantages (Briggs, 1997). A feature of a wildlife viewing product might be that an operator can accommodate twenty passengers aboard their raft. Advantages might include an experienced and knowledgeable operator with high levels of first aid training and a trip in a quiet location. Resulting benefits could be education, safety, relaxation and privacy.

In tourism, the key to effectively marketing products is emphasizing experiences and benefits (Briggs, 1997). For tourism products to be successful, they need to take into account wildlife viewers' demand characteristics and incorporate them into their products' features, advantages and benefits offered. By doing so, destinations will *augment* the product being offered.

2.4 APPLICATION OF DEMAND AND SUPPLY KNOWLEDGE

Once destinations have acquired information on demand and supply for their particular target market, they need to apply that knowledge to develop tourism products. The remainder of the literature review outlines how this information could be used by destinations. The first section discusses product differentiation, branding and positioning. The second section examines how a gap analysis might be used as a tool for examining opportunities for wildlife viewing product development.

2.4.1 PRODUCT DIFFERENTIATION &POSITIONING

Product Differentiation

Understanding demand allows businesses and destinations to achieve differentiation (Glazer, 2001). Product differentiation can be defined as "the degree to which a destination's product is meaningfully different and superior when compared by customers to competing products" (Best, 2000, p. 370). Understanding demand and applying it so that a product is differentiated from another product can create a competitive advantage (Dalrymple and Parsons, 2000). Specifically, market segmentation can identify critical attributes that can be used to differentiate competitive offerings (Moutinho, 1994). These attributes are the *augmented* components of the product. For instance, market segmentation could reveal that cycling is an activity that is popular among wildlife viewers. In response, a destination could offer wildlife viewing in conjunction with a cycling tour. Bicycling would augment the wildlife viewing product and would differentiate it from other wildlife viewing products and/or destinations.

Product Positioning

Positioning is an important component of product development. Product positioning describes "the manner in which customers perceive a business's product features and price in comparison to competitors' product features and prices" (Best, 2000, p. 370). A destination's product position is established by focussing marketing strategies on a particular target market having specific product preferences (Moutinho, 1994). In particular, tourism destinations may attempt to position their products so that their products seem to possess the characteristics most desired by the target market (Moutinho, 1994).

Destinations can undertake two types of differentiated positioning that are important from a product development perspective: benefit/attribute and customer-oriented. In benefit/attribute positioning, organizations emphasize their products' unique attributes, packaging advantages or benefits (Guiltinan et al., 1997). Once destinations understand demand characteristics, they can focus on a benefit/attribute that is important to wildlife viewers and incorporate it into product development and advertising. For instance, the Squamish Valley, the case study area for this project, emphasizes that it is winter home to the Bald Eagle. This unique attribute is used to attempt to position Squamish as an internationally renowned Eagle viewing destination.

In customer-oriented positioning, organizations attempt to separate themselves from major competitors by serving one or a limited number of market segments (Guiltinan et al., 1997). Squamish District, for example, is oriented to attract the outdoor travel market segment. Their tourism products often focus on activities such as rock climbing, mountain biking, hiking and wildlife viewing in a natural setting.

Strategies to strengthen a product or destination's image can be divided into two categories: repositioning and strengthening. Repositioning involves changing the *generic* or *expected* components of the product being offered. Future changes in demand could justify a company to shift its position in the market. For instance, changes in demographics, such as age or income, could affect wildlife viewers' demands for a certain type of product. If the market segment ages considerably, the demand for more physically-demanding backcountry wildlife viewing could decline. A destination may benefit by shifting its position to more frontcountry-oriented products, such as relaxing river float trips. It is important for destinations and operators to understand the most current demand characteristics of the wildlife viewing market so that they can develop new products or shift current products' positions to cater to their changing target customers.

The second strategy by which destinations can position themselves to enhance their image is by strengthening their current position (Ferrell et al., 1999). In other words, they can offer the same product but alter it slightly to better satisfy their customers. Destinations can accomplish this by constantly monitoring the demands of target customers and the extent to which the product is satisfying those demands (Ferrell et al., 1999). For instance, a destination may wish to continue offering frontcountry wildlife viewing products, but would strengthen their position in the market by providing several *augmented* components of tourism products.

Both repositioning and strengthening strategies require a good understanding of the product (supply) and the market (demand). By evaluating product-market matches, destinations can determine priorities for product development so that their competitive positions and may be enhanced.

2.4.2 GAP ANALYSIS & PRODUCT DEVELOPMENT

The need for Canada to take steps to assure better product-market matches in the travel sector has been recognized (Canadian Tourism Commission, 1997). Conducting a gap analysis is one method by which destinations can evaluate product-market matches and identify priorities for product development (Godfrey and Clarke, 2000).

Types of Gaps

Gaps can occur in different forms: supply-side, demand-side, or a combination of the two. Supply-side gaps occur when the total cost of creating a product is too high. In other words, this type of gap exists when the level of supply remains constant but there is a lower-cost method of creating the product in question (Coughlan et al., 2001). A wildlife viewing destination, for example, may be spending a large sum of money on advertising efforts. A supply-side gap occurs if there is a lower-cost way to advertise. While supply-side gaps are important to understand in a tourism context, they are beyond the scope of this project. However, destinations need to investigate supply-side gaps in addition to demand-side gaps in order to remain competitive.

Demand-side gaps can be described as a function of service quality. Gronroos' 1982 Perceived Service Quality Model suggests that the perceived quality of a service is the result of a comparison between customers' expectations and their actual experiences (Gronroos, 1990). Therefore, if consumers' experienced quality exceeds their expected quality of a service, the total perceived quality is positive. Alternately, if expectations are not met by the experience, the perceive quality is low (McNeill, 2000). In a tourism context, tourists have a series of expectations about a tourism destination or product. These expectations are usually a result of marketing communications, image and word of mouth (McNeill, 2000). Tourists who perceive that the total quality of a destination/product is high will have a positive image about that destination/product. This may result in repeat visits by those tourists and they will likely give favourable word-of-mouth recommendations to friends and relatives. Tourism destinations can therefore benefit by ensuring that service quality is high.

One commonly used method to examine product quality is the Gap Analysis Model of Service Quality. This model, created by V. A. Zeithaml, A. Parasuraman, and L. L. Berry in 1988, is an evolutionary form of Gronroos' model (McNeill, 2000). It outlines five gaps that can occur (Figure 2.3).

McNeill (2000) describes the five gaps as follows:

Gap 1: Consumer Expectations vs. Management Perceptions

This type of gap occurs when tourism managers fail to understand customers' expectations of products. Products that are created under such circumstances will likely result in low total perceived quality by customers. In order to avoid this, customers' expectations must be understood. Additionally, since expectations change over time, ongoing research is essential.

Gap 2: Management Perception vs. Service Quality Specifications

The second type of gap occurs when tourism managers know what customers expect, but cannot or will not develop products/services and systems to deliver it. This type of gap can occur because of inadequate commitment to service quality, lack of perception of the feasibility of addressing customer expectations, inadequate task standardization (within the tourism organization), and absence of goal setting by management (McNeill, 2000).

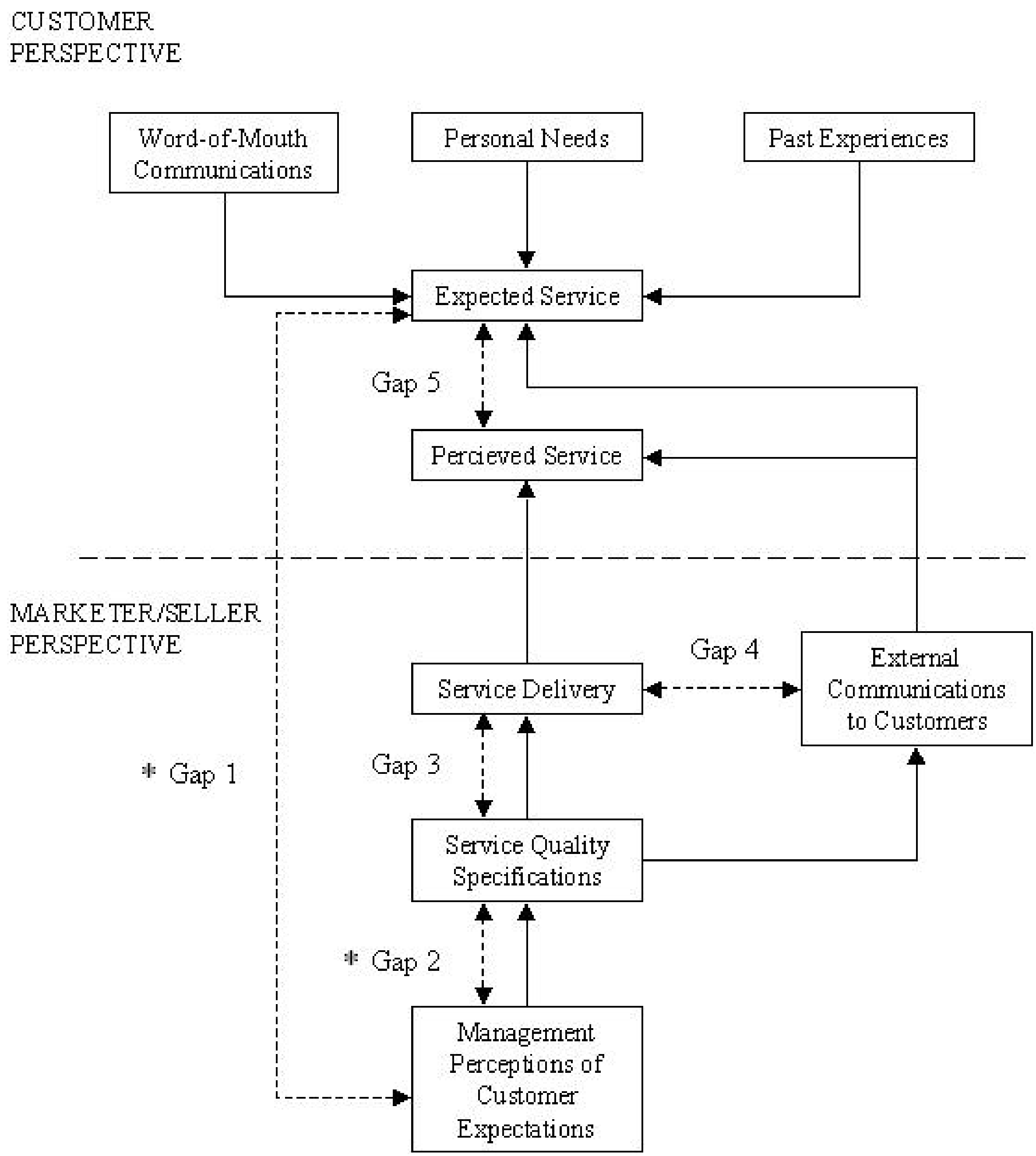
Gap 3: Service Quality Specifications vs. Service Delivery

This type of gap occurs when tourism managers *know* what customers expect and have developed products/services and specifications to deliver it, but employees are unable or unwilling to deliver the service. This type of gap can occur because employees are not given the tools and working conditions to do the job, or they are not correctly selected, trained, and motivated, or managers do not properly direct them.

Gap 4: Service Delivery vs. External Communications

The fourth type of gap occurs when tourism managers promise more in their external communications than they can deliver. External communications can include, among other things, advertising, public relations, pricing messages, and personal selling. In order to overcome this gap, destination managers and operators must ensure that operations can deliver what marketing (external communications) promises.

Figure 2.3 Gap Analysis Model of Service Quality



* *Focus of this study*

Source: adapted from McNeill, 2000, online.

Gap 5: Expected Service vs. Perceived Service

This type of gap is dependent upon the four previously mentioned gaps. It is the difference between the expected service and the perceived service. Expected services refer to what the customers expect to receive from the tourism product, and perceived service is what the customers believe/perceive that they have actually received from the tourism product. Service quality and thus customer satisfaction is dependent upon this gap being reduced or eliminated.

Identifying each of these types of gaps is important to ensure that destinations are meeting the needs of their target markets. Due to time and resource constraints, this study aims to identify only *gap 1* occurrences in the wildlife viewing industry in Squamish and, where applicable, it also identifies *gap 2* occurrences. A gap 1 analysis is chosen because it precedes the remaining gaps. Specifically, if a gap of type 1 occurs, managers are not aware of customers needs and therefore gap 2 (where managers are aware of those needs but fail to meet them) cannot occur. A gap 2 analysis will be undertaken in the event that tourism managers are aware of wildlife viewers needs in order to assess whether tthey are incorporating market demand knowledge into their product development.

Conducting Gap Analyses

In order to remain competitive, destinations need to undertake such analyses to determine methods for closing the gap between supply and demand. Murphy outlines some key steps that can be taken to address *gap 1* problems. First, existing data can be gathered on promising tourism market segments from local and national tourism agencies. Next, interviews with community members should be done to reveal their perceptions of target markets. Results from the target market analysis can then be compared with those of community members to determine whether there is a *gap 1* occurrence (Murphy, 1999).

Day (2001) outlines several questions that may help a destination or tourism business assess its competency in learning about and utilizing market data. They also help assess type 1 and 2 gaps:

1. How extensively does the business understand its customers? Small businesses usually do not conduct much research, yet their own customers are often a neglected source of valuable information (Witt and Moutinho, 1994). In addition to making use of research conducted by other agencies, small businesses can use the close contact they have with tourists to track customer behaviour and preferences. This observational approach will help develop products that meet tourists' demand (Witt and Moutinho, 1994).
2. How frequently is market monitoring undertaken, including customer complaint solicitation, post-transaction follow-up surveys, and service quality and satisfaction studies?
3. Do the information systems in existence give decision makers ready access to current market data?
4. What is the role of the market research function in the development and implementation strategy?
5. How reliant is the business on outsiders for market analysis and interpretation?
6. How thoroughly is market information integrated into the product development process?
7. What mechanisms exist for sharing lessons from one region or business to others in the same region or other regions?

Closing Demand-Side Gaps

Demand-side gaps can closed in three ways: offering multiple, tiered products to appeal to different market segments; altering the list of segments targeted; and expanding or retracting the amount or types of products provided to the target market (Coughlan et al., 2001). Since wildlife viewers have been selected in this project and by the District of Squamish as a target market, this study will focus on the latter method: altering the amounts or types of products offered to wildlife viewers. This will be discussed in Chapter Six: Management Implications.

Product Development and Sustainable Tourism

Although product-market gap analyses may reveal several opportunities for product development, destinations should not immediately jump into development. As stated in the beginning of the literature review, wildlife viewing has the potential to negatively affect the socio-economic and ecological foundations of destinations. However, since wildlife viewing inherently depends upon natural resources for its success, emphasis must be placed on protecting these resources if sustainability is to be achieved. Destinations should therefore keep principles of environmental sustainability in mind when developing tourism products. Environmental sustainability principles include protecting life support systems (i.e. air, water and land), protecting and enhancing biodiversity, and using natural resources carefully and efficiently (Robinson and Van Bers, 1996). Following these principles will help ensure that wildlife and their habitats are preserved for their own sake, and that they will be enjoyed by future generations of wildlife viewers.

CHAPTER THREE: PROJECT METHODS

This chapter describes the methods used in this study. It is divided into four sections. The first section restates the purpose and research questions for this study. Section two describes the rationale for the initial literature review, which outlines the research framework for this study. The third segment describes the key content dimensions of the Canadian Travel Survey (CTS) and the Domestic Tourism Market Research Study (DTMRS), and outlines the methods used to analyze the data in these studies related to wildlife viewers. Part four discusses the methods used to evaluate the wildlife viewing products in Squamish, BC, in the context of a product-market match gap analysis.

3.1. PURPOSE & RESEARCH QUESTIONS

3.1.1 PURPOSE OF STUDY

The overall purpose of this study is to gain a better understanding of travel market needs and product development opportunities associated with wildlife viewing product development in British Columbia. The specific objectives of this research are to gain insights into the nature of demand for wildlife viewing in the province and to develop a method for analyzing product-market gaps so that recommendations for wildlife viewing product development can be made. The techniques suggested in this phase are tested in a case study associated with wildlife viewing product development in the Squamish Valley, BC.

3.1.2 RESEARCH QUESTIONS

In the context of better understanding travel market needs in the context of wildlife viewing product development, the research questions addressed are:

1. What are some of the key characteristics of demand for wildlife viewing, based on a literature review and analyses of current market data?
2. What are some of the critical elements of product development from a demand perspective?

3. What is the current product-market match for the wildlife viewing industry in Squamish, BC, given the most recent demand characteristics?
4. How might Squamish better prepare itself to meet the demands of present and future wildlife viewers?
5. What lessons from this study can be applied to other communities in the province?

3.2 LITERATURE REVIEW

3.2.1 RATIONALE

The literature review in Chapter Two provided the analytical framework for this research. It identified factors that should be considered when assessing the match between market demand and supply associated with wildlife viewing product development. The primary topics of importance that were addressed included: the concept of tourism products in a wildlife viewing context; demand, including participation trends and relevant market segments; and, the application of supply and demand knowledge for product development. The last section of the literature review outlined the concept of a gap analysis and how it might be used in assessing product-market matches in the wildlife viewing industry.

3.3 ANALYSES OF CTS AND DTMRS DATA

3.3.1 RATIONALE

In order to effectively plan and develop wildlife viewing products, tourism destination managers must have a good understanding of the nature of demand for such activities. Fortunately, some useful sets of data exist that can help tourism stakeholders to better understand the state of tourism demand in Canada, as well as enhance their knowledge of wildlife viewing product and market development opportunities. Two data sources are the Canadian Travel Survey (CTS) and the Domestic Tourism Market Research Study (DTMRS). The CTS can be used to reveal general socio-demographic and trip information about wildlife viewers, while the DTMRS can shed light on some of the attitudinal and behavioural aspects associated with this market segment.

3.3.2 THE CANADIAN TRAVEL SURVEY

The CTS was developed to measure the volume, characteristics and economic impact of domestic travel by Canadians (Statistics Canada, 1997). It is conducted annually as a supplement to Statistic Canada's Labour Force Survey (LFS). The LFS, conducted monthly, is distributed to approximately 102,000 civilians aged 15 years or older in Canada's ten provinces. This survey uses a stratified sampling technique, whereby each province is divided into economic regions and employment insurance regions. These regions are further subdivided to reflect the areas' characteristics (e.g. population density, income areas). The strata of households resulting from these subdivisions are then divided into clusters (defined depending on the type of stratum), a sample of clusters is selected, and households are then systematically sampled from selected clusters. While the LFS collects information on all eligible household members, the CTS only collects information from one household member.

In official publications relating to the data, only overnight trips to Canadian destinations with a one-way distance of 80 kilometres or more (40 kilometres in Ontario) away from home are included. However, the survey collects information for all overnight trips, regardless of distance, and for all same-day trips having a one-way distance from home of 80 kilometres or more.

The overall response rate for the 1998 Canadian Travel Survey was 90% and all data were weighted according to several factors. Weighting was based on the probability of selecting the respondent, cluster and stabilization adjustments, non-response adjustments, adjustments to account for sub-sampling one eligible person from the household and an adjustment to ensure that the CTS estimates match provincial age group-sex and population projections. In total, 1,207 respondents to this survey indicated that they participated in wildlife viewing, while 53,706 respondents did not.

Methods for Analyzing Data

In 1998, 1,207 out of 54,913 respondents (2%) to the CTS reported that they participated in wildlife viewing. In this report, these particular respondents were segmented from the total sample in order to define some of the overall characteristics associated with wildlife viewers at the national level and to compare their characteristics to non-viewers.

Additionally, this group was further segmented to reveal some of the regional characteristics of wildlife viewers. From a product development standpoint, gaining a good understanding of wildlife viewers at the provincial level would have been preferable. However, due to the constraints of a limited sample size, this study could not go into greater detail at the provincial level. Consequently, this study assumed that comparing Eastern and Western Canadian wildlife viewers would give a more accurate picture of the nature of demand in BC than would a nation-wide overview. Canadian wildlife viewers were therefore further segmented into these two regional groups, based on the respondents' reported province of destination. Specifically, Western Canada included Manitoba, Saskatchewan, Alberta, British Columbia and the Northwest Territories. Eastern Canada included Ontario, Quebec, Nova Scotia, Newfoundland and Prince Edward Island.

The CTS includes records of both same-day and overnight trips away from home. While overnight trips are considered more important from a tourism standpoint, the inclusion of same-day trips was beneficial to this study. Specifically, Squamish (the case study area of this project) is located relatively close to urban Vancouver. Both visitors and residents of Vancouver could contribute significantly to the wildlife viewing industry in Squamish by making same-day trips to the area. Both same-day and overnight trips were therefore included in this analysis.

In order to account for sampling error, this report used the same guidelines used by Statistics Canada for release and publication of the Canadian Travel Survey data. Specifically, data was evaluated using coefficients of variation (CV). The CV, which is used to describe the standard deviation relative to the mean, allows the comparison of variability of two data sets (Triola, 1995). For this study, data with CVs of less that 16.6% were used without qualification. Data with CVs between 16.6% and 25.0% were used with caution. Data with CVs greater than 25.0% were considered to have sampling variabilities that were too high. Such data were not used in this report.

3.3.3 THE DOMESTIC TOURISM MARKET RESEARCH STUDY

About the DTMRS

The 1995 Domestic Tourism Market Research Study (DTMRS) was designed to reveal Canadians' travel habits, experiences, destination choices and expenditures. This study used two data collection methods. First, a telephone survey of 1,899 Canadians aged 15 or older was conduced in September 1995. Approximately 91% of the interviewees were randomly selected, while the remaining respondents were chosen in a manner suited to meet regional quotas. Second, a more in-depth survey comprised of 1,457 random in-person interviews was undertaken in October 1995. It was conducted in 48 urban centres with a population of over 30,000. The survey sample differed from the general Canadian population in terms of province, sex, age and travel incidence. Data were weighted by these four variables.

The DTMRS was specifically designed to allow the opportunity to establish linkages with the Canadian Travel Survey (CTS). For this purpose, some of the key questions from the CTS were replicated in the DTMRS. Bird and wildlife viewing was one of the items replicated on both surveys and was used to established linkages between the two studies in this research.

Methods for Analyzing Data

Similar to the CTS data, respondents of the DTMRS who indicated that they participated in bird or wildlife viewing at their destination of longest stay on their most recent trip were separated from the total sample. This helped define some of the trip and general travel motivations associated with wildlife viewers at the national level and to compare their characteristics to non-viewers. Activity participation during their most recent trips was also examined. The information was based on total weighted data. All of the differences highlighted in this analysis were based on significance differences of p=0.05 or greater as identified by chi-square or t-test statistical testing of the profile variables. In 1995, 380 out of 2687 respondents (approximately 14%) stated that they participated in bird or wildlife viewing on the DTMRS.

Anticipated Limitations to This Approach

This study only focused on those people who had engaged in wildlife viewing at the time of the survey and did not consider those people who had an interest in the activity but did not participate in it. This latter segment, the 'potential market', is important since it may provide a better indication of future demand (Proctor, 2000). However, several studies have found that it is often more cost-effective to retain the loyalty of existing customers than it is to acquire new ones. This perspective provided the rationale for placing emphasis on strategies designed to maximize future marketing opportunities from the current traveller base (Guiltinan et al., 1997).

3.4 CASE STUDY

3.4.1 RATIONALE

The Squamish Valley is an ideal location for wildlife viewing. Not only does it have an abundance of natural wildlife viewing resources, but it also is located relatively close to a major urban centre. It therefore has the opportunity to tap into a substantial potential market. The District of Squamish has already brought forth the desire to further develop its wildlife viewing products. However, a gap analysis is needed to assess product-market matches so that product development opportunities can be revealed. The rationale for undertaking this case study was to provide the Squamish District with the information that would assist the community in developing wildlife viewing products that matched with market demand, and to enable other communities wishing to enhance or develop wildlife viewing to follow the model used in this study.

The case study approach is a commonly used technique in the social sciences. It is primarily used to examine qualitative and to a lesser extent quantitative information. This approach is especially useful in investigating contemporary phenomenon within its real-life context (Yin, 1994). This project uses a case study approach to better understand opportunities for wildlife viewing development (the contemporary phenomenon) in the Squamish Valley (the real-life context).

3.4.2 GAP ANALYSIS PROCEDURES

Knowledge in a case study is mainly developed by collecting interview data and subjecting the data to analytic induction (Gall et al., 1996). This project used this approach to data collection. Specifically, in-person, telephone and email interviews with key informants were conducted to collect information on the supply of primary and secondary wildlife viewing resources in the Squamish area, and to reveal product-market match gaps, as well as *gap 1* and *gap 2* occurrences.

Key informants were chosen based on their involvement or interest in wildlife viewing in the Squamish area. An initial search of documents and Internet material identified a number of potential contacts in Squamish, such as the Chamber of Commerce, tourism officials, representatives of the wildlife organizations, and tour operators in the Squamish region. These people were asked to participate in the interviews and were asked to identify any other key informants that they knew of. This generated a total list of potential respondents. Attempts were made to contact each these people via email and telephone. However, since the interviews took place in the summer, many potential respondents were on vacation, were too busy to participate, or simply could not be contacted. In total, eight respondents from the list participated in the in-depth interviews.

The interview questions (Appendix B), based on information identified during the literature review, were divided into several categories: general, natural resource, cultural, events, activities, and services and facilities. The objectives of the questions were to gain a better understanding of the supply of wildlife viewing resources in the area, and to reveal product-market gaps. In particular, *gap 1* and *gap 2* occurrences were examined. *Gap 1* occurs when managers fail to understand customers' expectations of products. The related questions addressed respondents' perceptions of the demands of wildlife viewers, and how destination managers were attempting to meet these demands (i.e. by describing the product that they offer). When compared against the findings of the CTS and DTMRS data analyses, product-market match gaps and occurrences of *gap 1* were revealed.

Gap 2 occurs when managers are aware of what customers expect, but do not develop products that match these expectations. The questions asked respondents to describe how they incorporate market research into their development of wildlife viewing products. The purpose of these questions was to reveal *gap 2* occurrences. Management implications arising from analyses of the questions were addressed in Chapter Six.

3.4.4 ANTICIPATED LIMITATIONS OF THIS APPROACH

One of the frequently cited problems for validity in the use of case studies is the over-generalization of findings (University of Huddersfield, 1999; Soy, 1996). However, as Yin (1998) points out, case studies do not generalize in a statistical nature (from a sample to a population), but rather, do so in an analytic fashion (using the case study to illustrate, represent or generalize to a theory). This study attempted to overcome the over-generalization problem by using the case study to illustrate the *theory* behind effective wildlife viewing product development. In other words, the findings of the gap analysis are not applicable to other destinations. The method, however, could potentially be used to assess product development in other destinations.

CHAPTER FOUR: FINDINGS

This chapter outlines some of the characteristics of wildlife viewers that are important from a product development perspective. It describes both the general characteristics of wildlife viewers and highlights the key socio-demographic, psychographic and behavioural characteristics that differentiate wildlife viewers from non-viewers.

4.1 FINDINGS OF THE CANADIAN TRAVEL SURVEY

4.1.1 SOCIO-DEMOGRAPHIC CHARACTERISTICS

Gender, Age and Marital Status

The literature suggests that wildlife viewers are relatively evenly split along gender lines, with slightly more males than females participating. This study revealed similar findings. Fifty-three percent of wildlife viewers were male and 47% were female[3]. Similar observations are observed at a regional level. Over half (56%) of the viewers visiting the West were male and fewer were female. In the East, however, the roles were reversed. Over half (56%) of wildlife viewers in this region were female.

Previous studies have found that predominantly older travellers are interested in wildlife viewing activities. However, on average, wildlife viewers in this analysis were younger than those that other studies have identified[4]. Almost half (49%) of viewers were between 20-34 years of age. The second most prominent group of participants (32%) were Baby Boomers (Figure 4.1). Viewers visiting Western Canada were slightly younger than their Eastern counterparts. Seventy-four percent of Western viewers and 64% of Eastern viewers fell between the ages of 20-44 years of age. Only 16% of viewers visiting the West were 45 years or older, while 25% of viewers to the East fell into that category.

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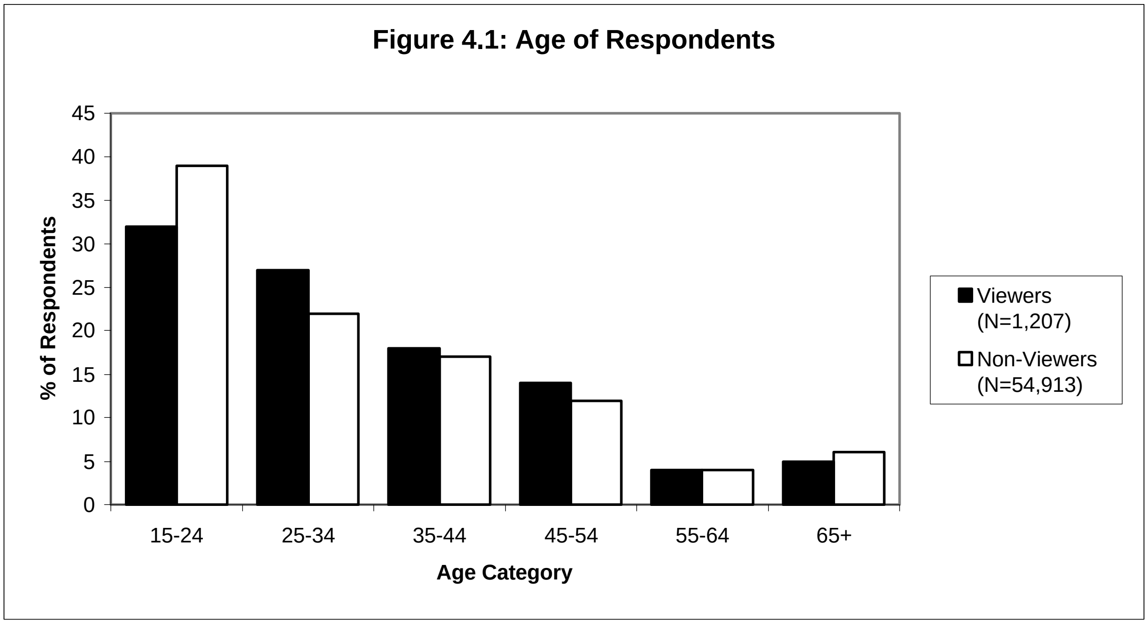
[3] Calculations after children records are excluded.
[4] When children records are excluded.



Half (50%) of the domestic bird and wildlife viewers surveyed were married or had common-law relationships, while the other half were either single (includes children records) or were separated, divorced or widowed. Similar results were observed at a regional level.

Education

The literature suggests that wildlife viewers tend to be better educated than general tourists. This was confirmed in this research. Bird and wildlife viewers tended to have high levels of formal education (Figure 4.2). About three-fifths (61%) of the viewers were graduates with post-secondary certificates or diplomas, or university degrees. Regional findings were similar.

Figure 4.2: Education

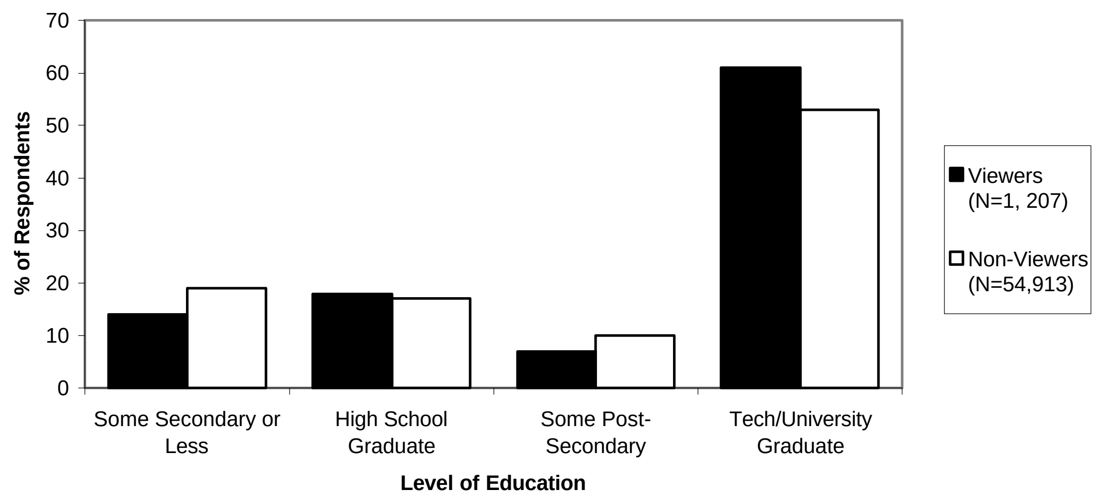
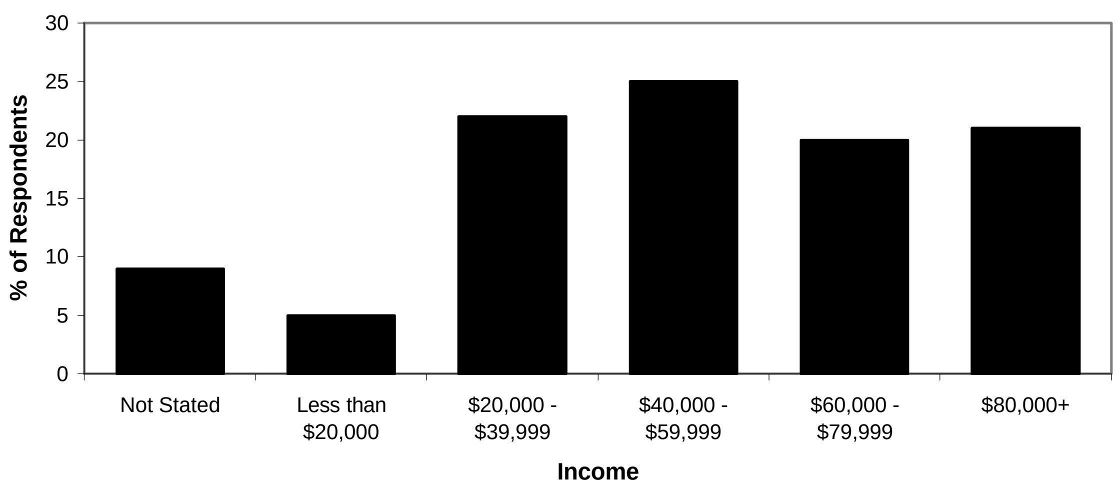


Figure 4.3: Income Distribution

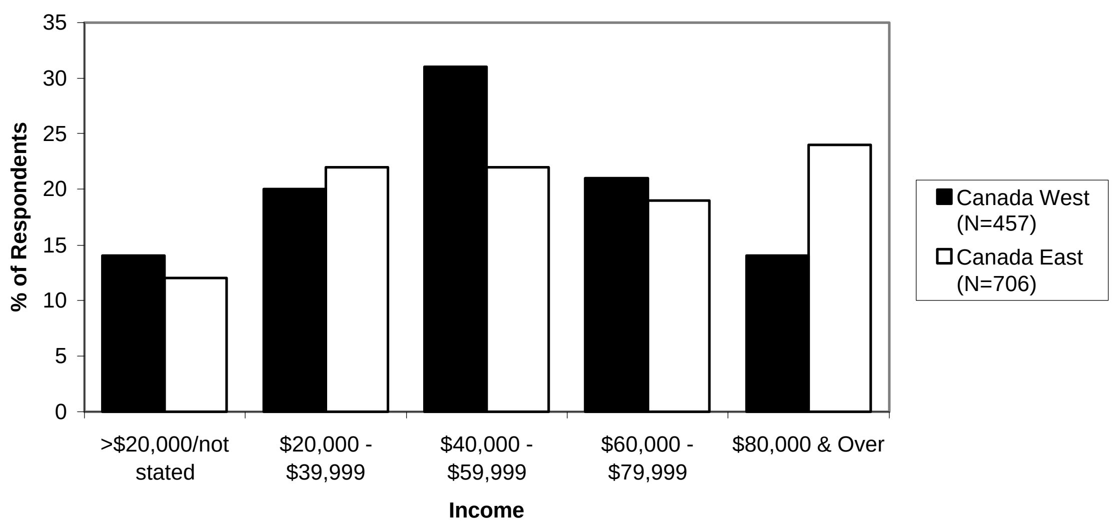


Income

Previous studies suggest that nature and adventure markets tend to come from middle- to upper-income groups. However, the household income distribution of the domestic bird and wildlife viewer segment in this study was distributed relatively evenly across all income ranges examined in the study (Figure 4.3). However, few viewers were in the under $20,000 category.

Household incomes were slightly different between the two regions. The most common household income for visitors to the West was the $40,000 - $59,999 range (31%) (Figure 4.4). The most common income levels amongst Eastern wildlife viewers was $80,000 and over (24%), while only 14% of visitors to the West earned this much money.

Figure 4.4: Income Distribution Canada West vs. Canada East



4.1.2 TRIP CHARACTERISTICS

Province of Origin

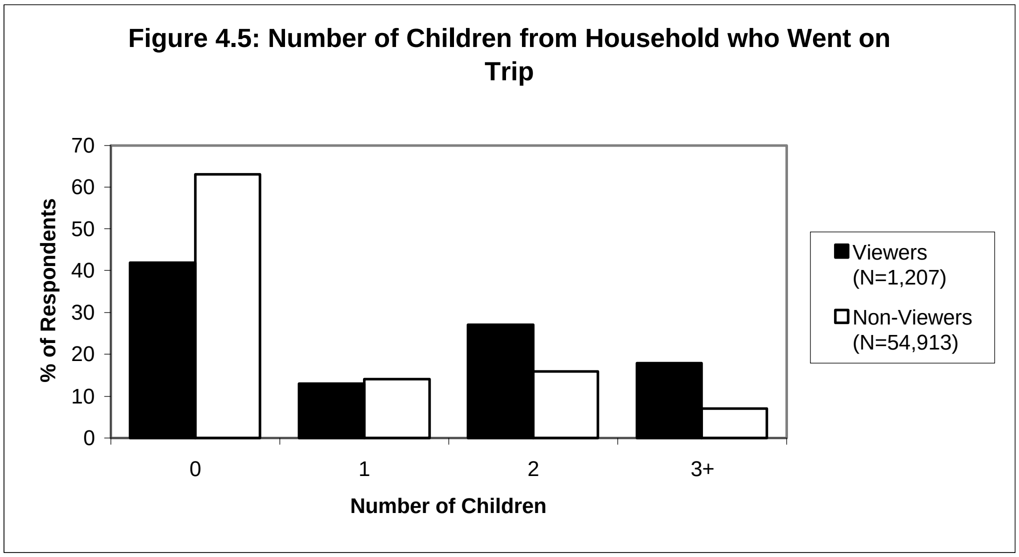
At a national level, the largest proportion of viewers indicated that their province of origin was Ontario (43%), or Quebec (22%), followed by British Columbia (12%) and Alberta (12%). On a per capita basis, the top three provinces of origin were Manitoba, Alberta and Ontario. Overall, the most frequented destination for viewers was Ontario (41%). Another quarter (23%) of domestic viewers chose Quebec as their province of destination, making it the second most frequented location. While BC only ranked as the third most frequented destination overall for domestic bird and wildlife viewers (16% of viewers chose BC as their destination), it ranked as the number one bird and wildlife viewing destination on a per capita basis.

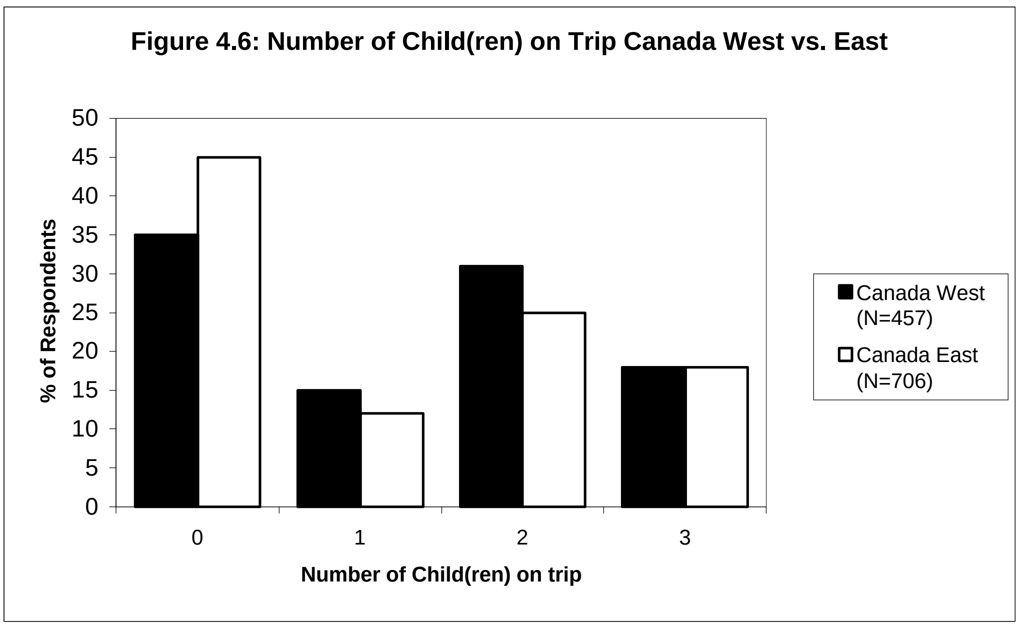
The majority of wildlife viewers visiting Western Canada were either from British Columbia (38%) or from Alberta (37%). This study indicates that almost 9% of all British Columbians and 12% of the Albertan population took wildlife viewing trips in Western Canada. The most common destination for visitors to Canada West was British Columbia (50%), followed by Alberta (26%).

Party Composition

The majority (60%) of wildlife viewers had three or more people from their households who went on their trips. In contrast, the majority (64%) of non-viewers traveled by themselves or with only one other member from their household. The literature suggests that wildlife viewing is generally a more family-oriented activity. Analysis of the CTS found that about three-fifths (58%) of all viewers indicated that children from their households accompanied them on their trips. Almost half (47%) of these people brought 2 children with them (Figure 4.5). In comparison, the majority (63%) of respondents who did not participate in wildlife viewing indicated that they did not have any children from their households accompany them on their excursions.

Viewers who visited Western Canada also tended to be more family-oriented. About 64% of them indicated that children from their households accompanied them (Figure 4.6). A smaller proportion (55%) of viewers in Eastern Canada had children from their households travelling with them. The majority (65%) of Western Canadian viewers had three or more people from their household who went on their trips, while 56% of travellers in the East did so.





Transportation, Trip Duration and Distance Travelled

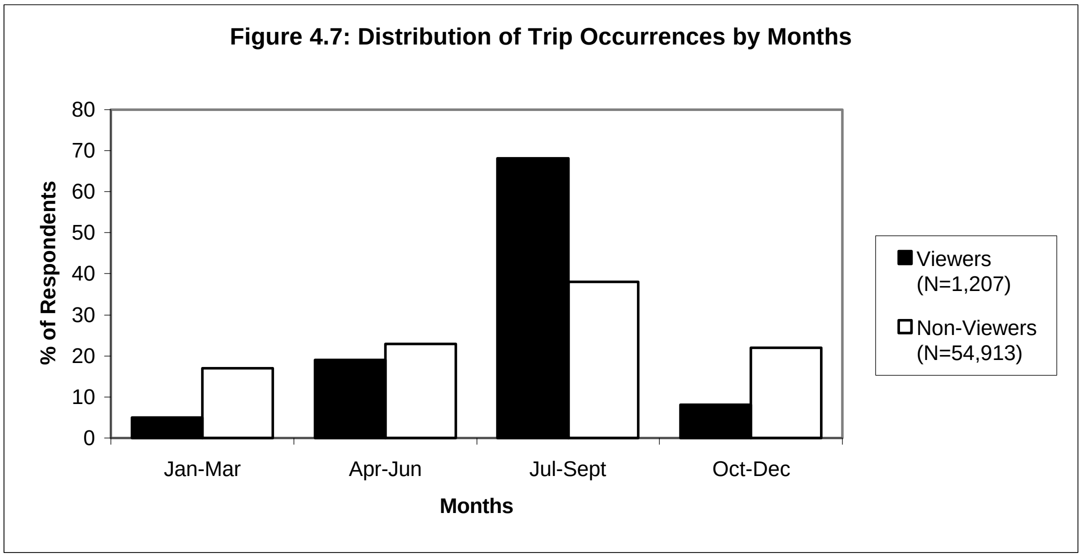
A full 93% of viewers indicated that the automobile was the type of transportation used for the longest distance travelled on their trip. Bird and wildlife viewers travelled an average of over 393 km during their trips, whereas non-viewers only averaged just over 281 km.

Additionally, a high proportion (85%) of excursions by viewers were overnight trips, while the incidence of overnight trips taken by non-viewers was much lower (56%). On average, viewers spent 4.24 nights away from home while non-viewers only spent 1.85 nights on their trips.

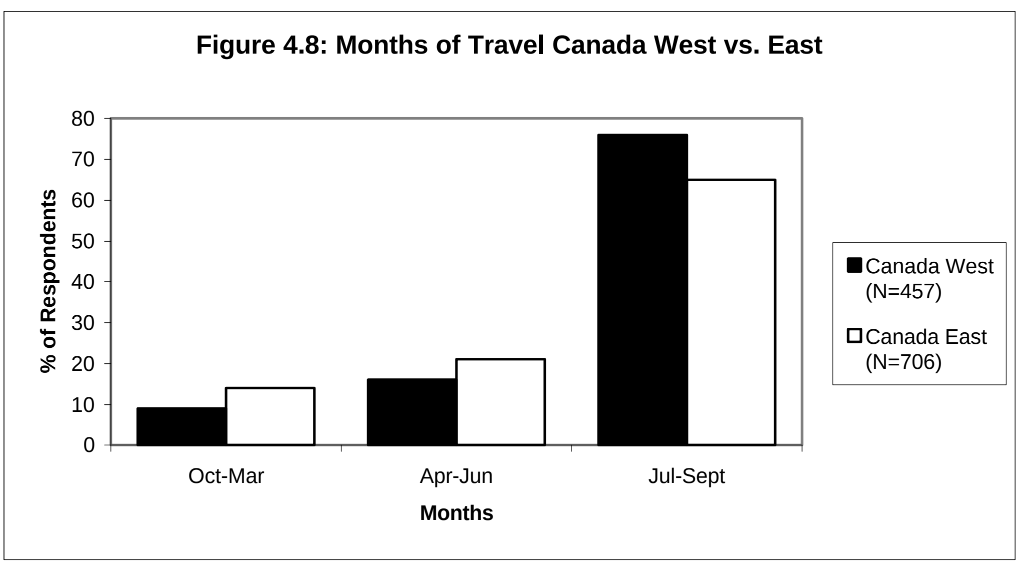
Those who took trips to the West tended to travel farther and spend more time on their trips. About 93% of viewers' trips to Western Canada were overnight in nature, while 82% of trips to Eastern Canada were for more than a day in length. On average, Western Canadian viewers travelled just under 550 km and spent 5.35 nights away from home. In contrast, Eastern Canadian viewers travelled an average of just over 321 km and spent 3.72 nights away from home. Overnight trips were more popular among viewers who had completed a post-secondary program (88%). These types of trips had lowest levels of occurrence among those with only some post-secondary education or less (78%). Ninety-eight percent of viewers in the CTS chose not to use packages.

Season of Travel

Sixty-eight percent of the trips taken by bird and wildlife viewers occurred between July and September (Figure 4.7). Trips taken by respondents who did not participate in bird or wildlife viewing, on the other hand, were more spread out throughout the year – only 38% of their trips were taken in summer. Those who travelled with children tended to take more summer trips (76%) compared to those who did not do so (58%).



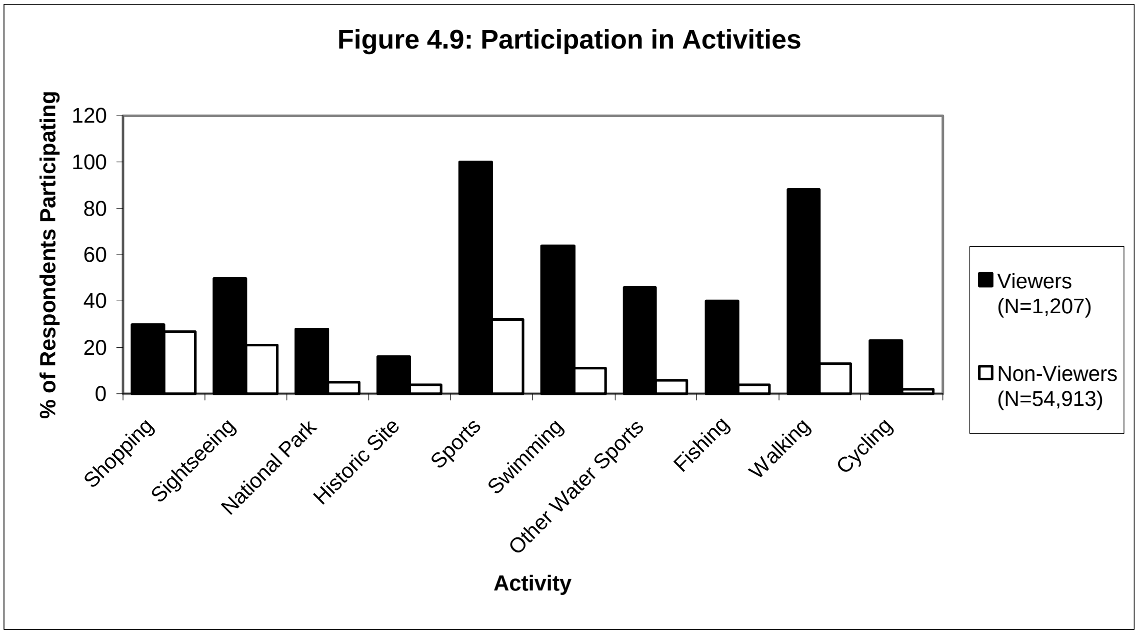
Bird and wildlife viewing was slightly more apt to occur during the summer in Western than in Eastern Canada. Seventy-six percent of those viewers who visited Western Canada took their trips from July to September, compared to 65% of those who travelled in Eastern Canada (Figure 4.8). The second most popular time for taking a trip for those who visited Eastern Canada was the April – June period (21%), while a lower proportion of people visiting the West did so in the same time period (16%*).



*Data to be used with caution.

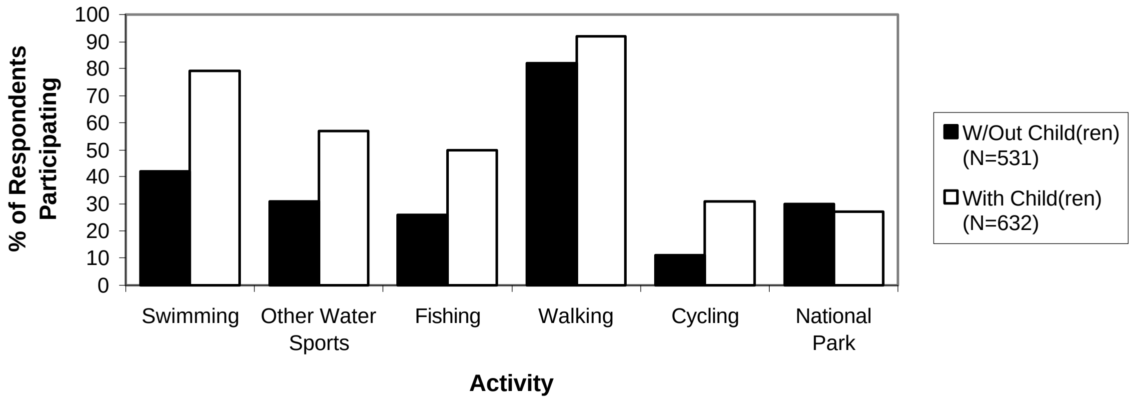
Activities

Those respondents to the CTS who participated in wildlife viewing reported that they engaged in a variety of other outdoor activities. Approximately 88% of viewers indicated that they went walking, 64% swam and 50% went sightseeing (Figure 4.9). Additionally, almost half (46%) of the viewers participated in other water sports, such as kayaking, boating, and scuba diving. About 40% of them fished, 28% visited a national or provincial park, and 23% cycled. Non-viewers participation rate in these outdoor activities were much less.



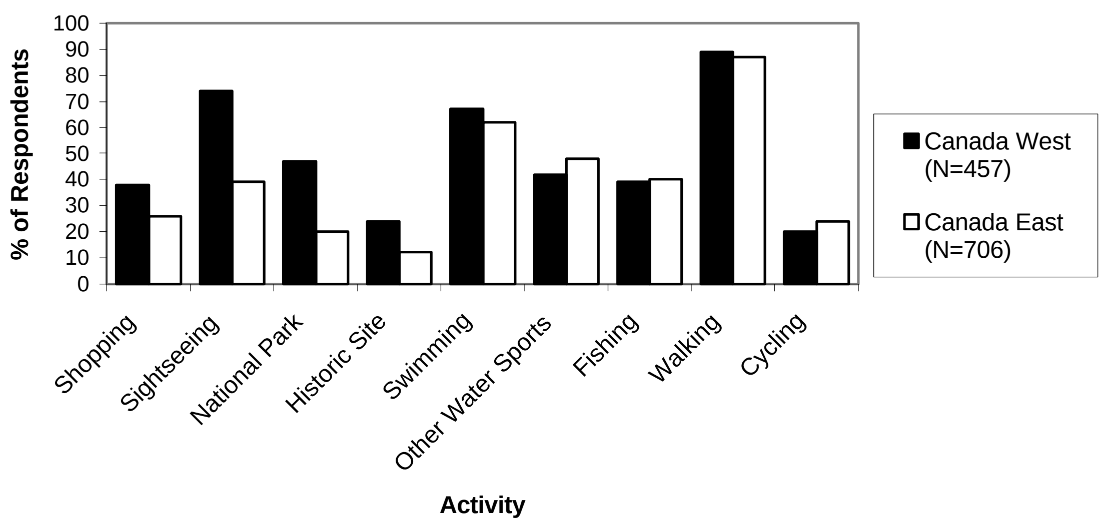
The incidence of participation in swimming and other water sports was quite high for travellers with children (79% and 57% respectively). It was lower for travellers without children (42% and 31% respectively) (Figure 4.10). In addition, half of those viewers who brought children on their trip participated in fishing. Only about a quarter (26%) of those who did not bring children went fishing.

Figure 4.10: Participation in Activities for Viewers Without Children vs. With Children



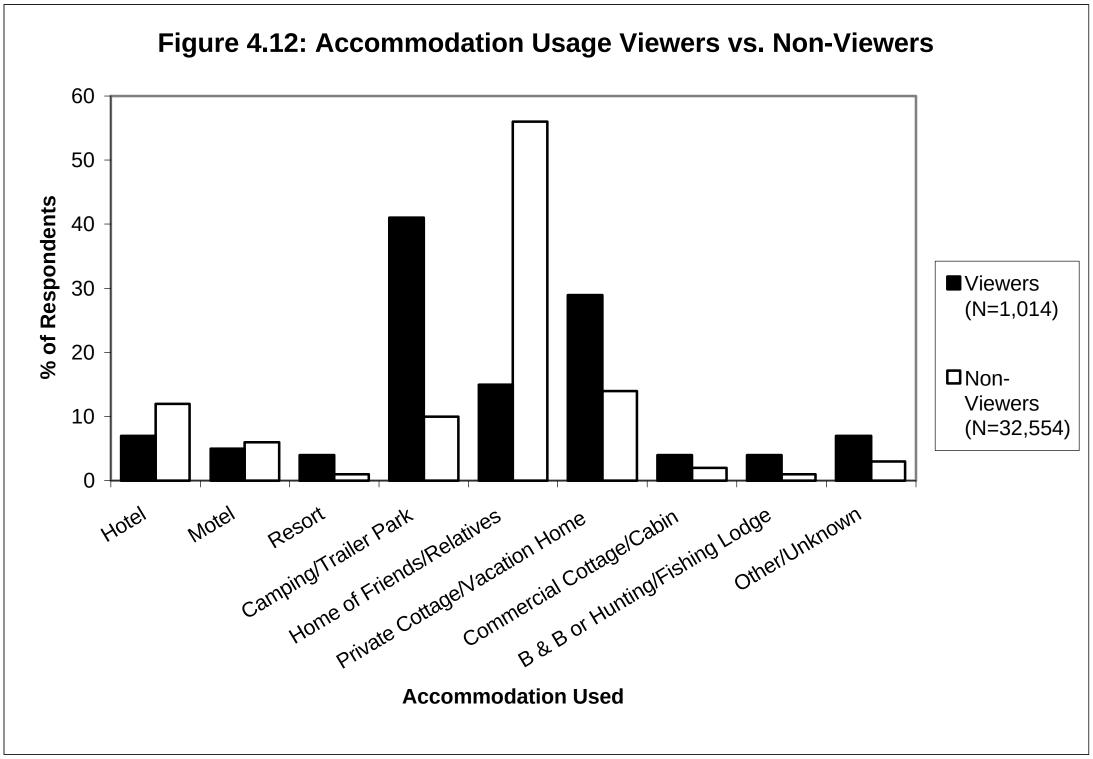
A few notable differences existed in the participation trends between the two regions. First, a high proportion of viewers to the West went sightseeing on their trip (74%), while a lower percentage of viewers to Canada East undertook the same activity (39%) (Figure 4.11). Second, 24% percent of viewers who visited Western Canada explored historic sites compared to only 12% of viewers to Eastern Canada. Finally, almost half (47%) of Western Canadian wildlife viewers compared to a fifth (20%) of Eastern Canadian viewers went to national parks.

Figure 4.11: Activities Canada West vs. East



Accommodation

About two-fifths (41%) of bird and wildlife viewers indicated that camping (including staying in trailer parks) was their main form of accommodation during their trips in 1998 (Figure 4.12). In contrast, only 10% of non-viewers chose camping as their main accommodation type. Camping was also important to those viewers with families. About 43% of those travelling with their children indicated that camping was their main form of accommodation, while only 23% of those travelling without children camped.



Cottages were the second most common form of accommodation used by wildlife viewers in Canada. In 1998, 29% of bird and wildlife viewers indicated that cottaging was their main form of accommodation.

Camping was especially popular for those domestic viewers who visited Western Canada, about 48% of them chose this accommodation option, compared to 37% in Eastern Canada. Cottaging was more common for those viewers in Eastern Canada. About 33% of them indicated that this was their main form of accommodation. In contrast, only 19%* of viewers in Western Canada chose cottages as their main lodging type. Seventeen percent of visitors to the West stayed at the homes of friends and relatives, as did 14% of visitors in the East.

4.2 FINDINGS OF THE DOMESTIC TOURISM MARKET RESEARCH STUDY

The following section discusses some of the socio-demographic, psychographic and trip characteristics of wildlife viewers who participated in the 1995 Domestic Tourism Market Research Study (DTMRS). The purpose of this section is twofold. First, this analysis is used to help verify and/or broaden the perspectives on wildlife viewers suggested by the results from the CTS analysis. Since the DTMRS does not include same-day trips, this analysis gives a more complete indication of the characteristics of viewers taking overnight trips. The second purpose of this section is to provide additional information to the CTS analysis. Specifically, the DTMRS analysis outlines the attitudinal characteristics of viewers, such as their travel philosophies, product preferences and trip/general travel motivations, which are not discussed by the CTS.

4.2.1 SOCIO-DEMOGRAPHIC CHARACTERISTICS

The majority of these findings are consistent with the findings from the CTS data analysis. As a group, wildlife viewers

- tended to be relatively evenly split along gender lines. Approximately 52% were males and 48% females;
- were between the ages of 35-49 (Figure 4.13);
- were more likely to be married or living with someone (63%);
- had higher levels of education than non-viewers (Figure 4.14); and,
- had annual household incomes that were relatively evenly distributed throughout the categories for both viewers and non-viewers (Figure 4.15).

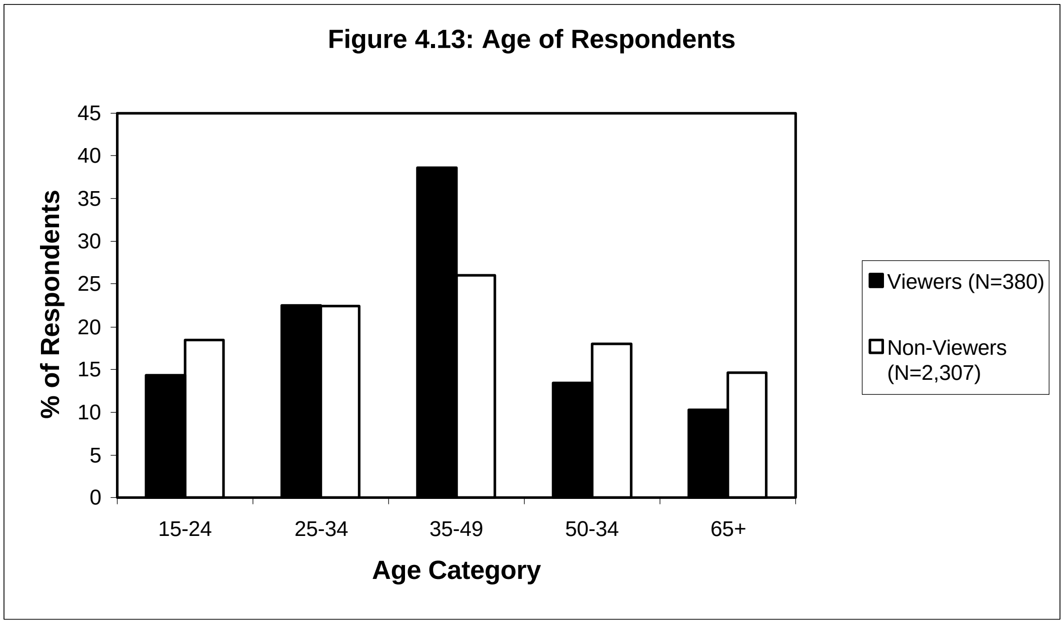


Figure 4.13: Age of Respondents
% of Respondents
45
40
35
30
25
20
15
10
5
0
15-24
25-34
35-49
50-34
65+
Age Category
Viewers (N=380)
Non-Viewers (N=2,307)

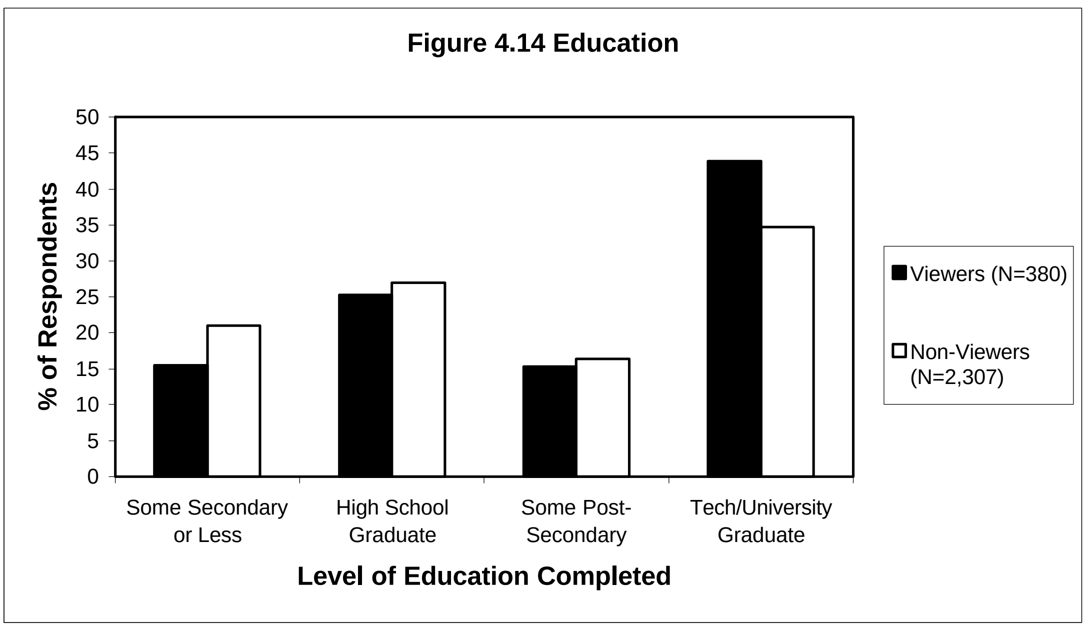
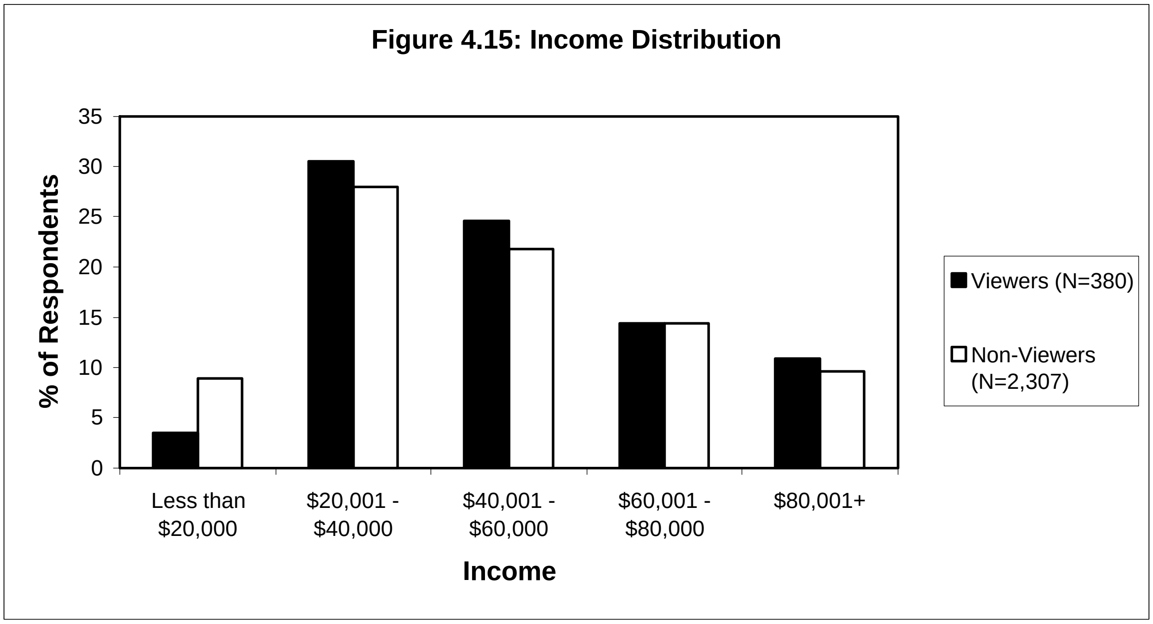


Figure 4.14 Education
% of Respondents
50
45
40
35
30
25
20
15
10
5
0
Some Secondary or Less
High School Graduate
Some Post-Secondary
Tech/University Graduate
Level of Education Completed
Viewers (N=380)
Non-Viewers (N=2,307)



4.2.2 PSYCHOGRAPHIC CHARACTERISTICS

Psychographic research can provide tourism managers with valuable information for planning, designing, positioning and distributing tourism products. This section outlines the travel philosophies, trip and general travel motivations of wildlife viewers that may be useful for wildlife viewing product development.

Travel Philosophies

In this study, travel philosophies express how respondents generally feel about travel. Table 4.1 illustrates that the travel philosophies of viewers and non-viewers were quite similar. On average, the most important philosophies were that getting value for their holidays is very important, that they travel for leisure, recreation or holiday whenever they can afford to do so, and that money spent on travel is very well spent. Viewers also placed importance on making their own holiday arrangements, taking trips during the summer and taking frequent short trips of a few days each year. The greatest differences between the two groups were that viewers placed significantly more importance on taking lots of short trips to a lake or cottage and taking one or two trips of a week or more each year.

Table 4.1 Travel Philosophies (See Appendix A for full list)

Travel Philosophy	Mean Response * Bird Wildlife	Other	t	Sig.
There is a lot to see and do in Canada	3.81	3.77	3.91817	0.00009
Getting value for my holiday money is very important to me	3.66	3.70	-2.88388	0.00393
I travel for leisure, recreation or holiday whenever I can afford to	3.63	3.53	6.16922	0.00000
For me, money spent on travel is very well spent	3.55	3.52	2.09246	0.03641
I enjoy making my own arrangements for my holidays	3.53	3.44	5.49269	0.00000
I often take holidays during the summer	3.45	3.31	6.51933	0.00000
I generally take frequent short trips of a few days each year	3.40	3.17	10.16045	0.00000
I generally take one or two trips of a week or more each year	3.21	2.95	10.57512	0.00000
I take lots of short trips to a lake or cottage	3.00	2.41	21.71627	0.00000
I prefer taking a holiday in Canada instead of going to the U.S.	3.00	2.91	3.48291	0.00050
I would consider travelling more in Canada in the spring or fall if special packages or value added offers were available	2.93	2.90	1.27783	0.20133

* Based on a scale where 1 = strongly disagree, 2 = somewhat disagree, 3 = somewhat agree and 4 = strongly agree.

Trip Motivations

The most important trip motivations for both viewers and non-viewers were quite similar (Table 4.2). For both groups, the two most important trip motivations were standards of hygiene and cleanliness and nice weather, and visiting destinations that provided value for their holiday money. Other important general trip motivations for viewers were having fun and being entertained, travelling to destinations that provided value for their holiday money, meeting interesting and friendly local people, and visiting places with high environmental quality of air, water and soil.

The greatest differences between the two groups were that viewers as compared to non-viewers placed more importance on chances to see wildlife, birds and flowers that they don't normally see, opportunities to pursue outdoor activities, and access to inexpensive restaurants.

Table 4.2 Trip Motivations (See Appendix A for full list)

MOTIVATION	Mean Response		t	Sig.
	Bird Wildlife	Other		
Standards of hygiene and cleanliness	3.59	3.52	1.73686	0.08251
Nice weather	3.48	3.48	-0.04396	0.96494
Having fun, being entertained	3.45	3.27	3.72756	0.00020
Destination that provides value for my holiday money	3.32	3.29	0.66705	0.50479
Interesting and friendly local people	3.27	3.15	2.60375	0.00927
Environmental quality of air, water and soil	3.25	3.15	1.89951	0.05759
Personal safety, even when travelling alone	3.23	3.41	-3.89843	0.00010
Opportunity to increase one's knowledge	3.20	3.02	3.75650	0.00018
Variety of things to see and do	3.17	3.32	-3.12464	0.00180
Outstanding scenery	3.16	3.07	1.83114	0.06718
Inexpensive restaurants	3.00	2.76	4.78415	0.00000
Chances to see wildlife, birds and flowers that you don’t normally see	2.78	2.46	5.72588	0.00000

* Based on a scale where 1 = not important at all, 2 = not very important, 3 = somewhat important and 4 = very important.

General Travel Motivations

In this study, general travel motivations refer to those triggers which encourage the respondents to travel in general. Table 4.3 reveals the general travel motivations of wildlife viewers and non-viewers. The top three travel motivations for viewers were standards of hygiene and cleanliness, destination that provides value for holiday money, and personal safety. Non-viewers also placed great importance on these motivations. Not surprising, the greatest differences in travel motivations between the two groups were that wildlife viewers placed significantly more importance on nature-related motivations, such as outdoor activities, chances to see wildlife, birds and flowers that they don’t normally see, national or provincial parks, campgrounds/trailer parks and outstanding scenery.

Table 4.3 General Travel Motivations (See Appendix A for full list)

Motivation	Mean Response * Bird Wildlife	Other	t	Sig.
Standards of hygiene and cleanliness	3.63	3.62	0.79863	0.42452
Destination that provides value for my holiday money	3.54	3.44	5.36723	0.00000
Personal safety, even when travelling alone	3.48	3.51	-1.42776	0.15338
Variety of things to see and do	3.41	3.28	7.58874	0.00000
Nice weather	3.40	3.48	-4.41553	0.00001
Outstanding scenery	3.36	3.14	11.35244	0.00000
Opportunity to increase one's knowledge	3.33	3.16	8.93867	0.00000
Interesting and friendly local people	3.32	3.22	5.13480	0.00000
Having fun, being entertained	3.32	3.30	1.22900	0.21909
Environmental quality of air, water and soil	3.29	3.21	3.43623	0.00059
Chances to see wildlife, birds and flowers that you don't normally see	3.10	2.82	12.87012	0.00000
Availability of comprehensive pre-trip and tourist information	3.02	2.75	11.01925	0.00000
Activities for the entire family	2.90	2.75	5.77505	0.00000
National or provincial parks	2.89	2.64	11.68782	0.00000

* Based on a scale where 1 = never important, 2 = sometimes important, 3 = often important and 4 = always important.

4.2.3 TRIP CHARACTERISTICS

Party Composition

The average travel party size for wildlife viewers was approximately three people. The number of minors who accompanied the travel party averaged to 0.87. These findings are similar to non-viewers in the DTMRS (See Appendix A).

Trip Duration and Packages

On average, wildlife viewers spent significantly more nights away from home than non-viewers did. However, while the CTS found that viewers averaged 4.24 nights away from home, the DTMRS results indicate that this market segment spent an average of 10.9 nights away from home (Table 4.7). This difference is due to the fact that the CTS takes same-day trips into account, while the DTMRS only includes trips of one night or more.

Similar to the CTS findings, the analysis of the DTMRS also revealed that wildlife viewers generally did not use trip packages (Table 4.8). The CTS data found that 98% of viewers opted not to use packages while the DTMRS established that only 83% chose not to use them. Once again, these differences are likely because the DTMRS did not include same-day trips. Packages would be more important in overnight trips than on same-day excursions.

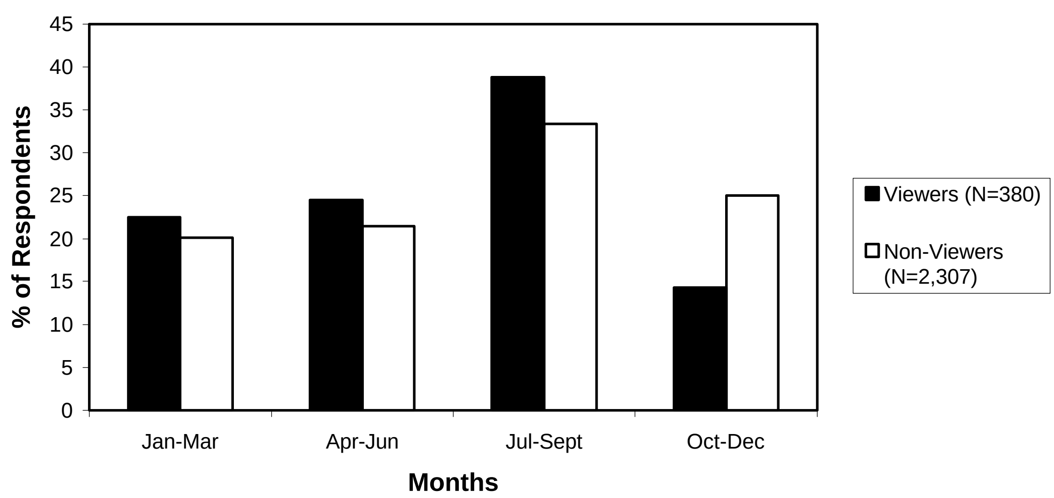
Season of Travel

The CTS found that the majority of viewers' trips (68%) occurred in the third quarter (July-September). The DTMRS confirms that most common time for wildlife viewers to travel was in the third quarter (39%, Figure 4.16). The fact that wildlife viewers tend to travel in the third quarter may present some opportunities to overcome seasonality through product development.

Reason for Taking Trip

Wildlife viewers mainly took their trips for pleasure or a vacation (51%). Non-viewers, on the other hand, took their trips to visit friends and relatives (41%). This was the second most popular reason for travel by wildlife viewers. Weekend getaways were the third most frequently sited reason that wildlife viewers took their most recent trip (See Appendix A).

Figure 4.16: Distribution of Trip Occurrences by Months



Activities

The four most popular activities for wildlife viewers during their most recent trip were taking pictures or filming, visiting scenic landmarks, informal or casual dining and dining in fast food restaurants. The fifth most popular activity for wildlife viewers was visiting natural ecological sites such as forests, wetlands and animal reserves. This activity also represented the greatest difference between viewers (52.2%) and non-viewers (17.7%). Not surprisingly, significantly more wildlife viewers participated in visiting mountainous areas, in outdoor activities such as climbing, staying in campgrounds and taking a nature and/or science learning trip (Table 4.4).

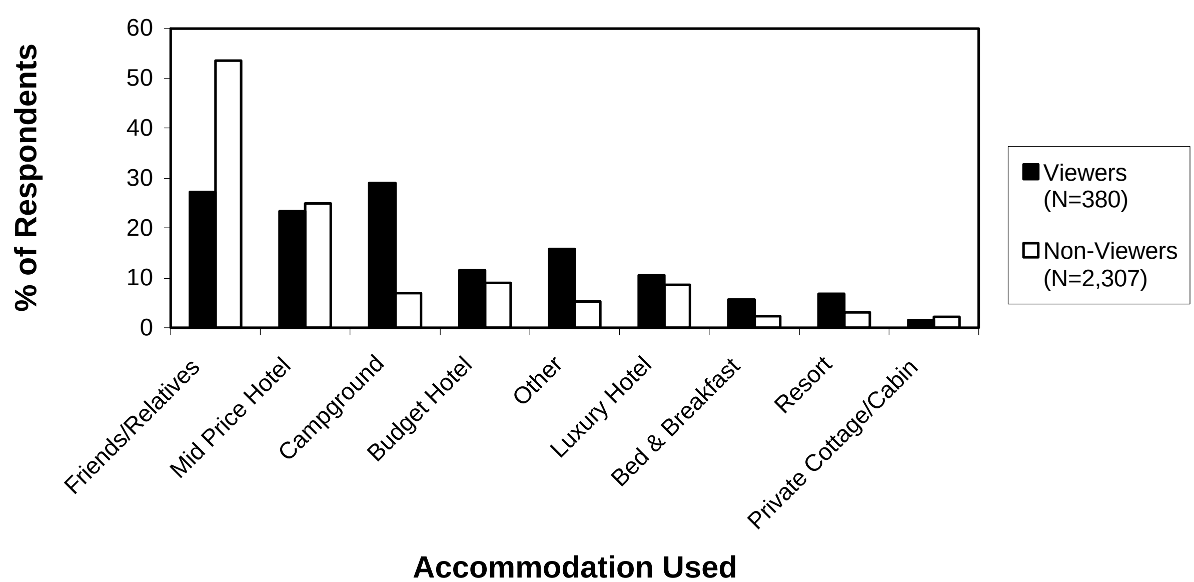
Accommodation

The most frequently cited forms of accommodation used by wildlife viewers were campground or caravan parks, homes of friends or relatives, and mid-priced hotels (Figure 4.17). While camping was found to be the number one accommodation used by both CTS and DTMRS wildlife viewers, the CTS found that a high proportion of viewers stayed in private cabins or cottages, while the DTMRS did not.

Table 4.4 Activity Participation During Most Recent Trip (See Appendix A for full list)

Activity	Bird Wildlife	Other	χ2	Sig.
Taking pictures or filming	58.9%	49.5%	31.533	0.000
Visiting scenic landmarks	54.5%	31.0%	217.999	0.000
Informal or casual dining with table service	54.1%	59.4%	10.171	0.001
Dining in fast food restaurants or cafeterias	52.9%	51.7%	0.540	0.462
Visits to appreciate natural ecological sites like forests, wetlands, or animal reserves	52.2%	17.7%	605.777	0.000
Sunbathing or other beach activities	50.6%	28.3%	205.692	0.000
Visiting small towns and villages	47.6%	30.0%	125.632	0.000
Driving to scenic places	45.7%	33.1%	62.061	0.000
Getting to know local people	42.0%	34.1%	24.598	0.000
Visiting mountainous areas	41.4%	16.4%	346.092	0.000
Outdoors activities such as climbing, etc.	39.5%	15.4%	339.760	0.000
Sampling local foods	37.6%	24.3%	80.898	0.000
Local crafts and handiwork	31.3%	19.7%	71.365	0.000
Taking a nature and/or science learning trip	29.4%	11.2%	248.916	0.000
Staying in campgrounds or trailer parks	24.8%	7.5%	299.559	0.000

Figure 4.17: Accommodation Usage



4.3 SUMMARY OF FINDINGS

- Wildlife viewers were relatively evenly-split along gender lines, tended to fall into a range of age and income categories and were highly educated.
- Compared to non-viewers, wildlife viewers were more apt to travel in groups, and many of them indicated that they travelled with children.
- Compared to non-viewers, viewers spend more nights away from home and travelled farther. Viewers from Canada West tended to travel farther and spend more nights away from home than their Eastern counterparts.
- Wildlife viewers tended to travel in the summer and participated in a variety of outdoor activities. Swimming, walking, other water sports, taking pictures, visiting scenic landmarks and visits to appreciate natural ecological sites were the most frequented activities by wildlife viewers.
- Campsites, cabins, homes of friends and relatives and hotels were the most popular accommodation preferences for viewers.
- Additionally, viewers have several travel philosophies, and trip and general travel motivations that differentiate them from non-viewers and that are important from a product-development perspective.

CHAPTER FIVE: CASE STUDY

The purpose of this case study was to analyze the product-market match for wildlife viewing in Squamish, British Columbia so that recommendations for product development could be made. This chapter is divided into two sections. The first segment presents a description of the Squamish area, including the location and environment, as well as the changes in the industries there. The second section presents the research findings from interviews with key stakeholders in the community. Specifically, responses are summarized, product-market gaps are outlined, and wildlife viewing development opportunities arising from the interviews are revealed.

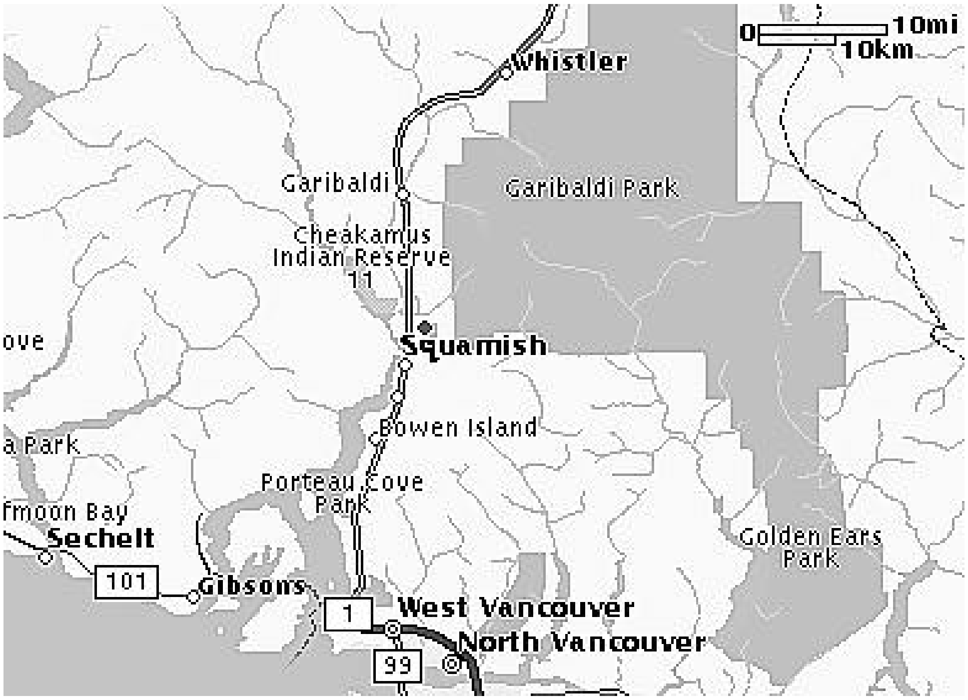
5.1 DESCRIPTION OF THE SQUAMISH AREA

5.1.1 LOCATION & ENVIRONMENT

The District of Squamish is located 63 km north of Vancouver and 50 km south of Whistler (Figure 5.1) (District of Squamish, 1999). It is part of what is considered the Sea-to-Sky region, which is comprised of the area surrounding the communities of Squamish, Whistler and Pemberton (Reed, 1999). Squamish, the largest community in the Sea-to-Sky region (Reed, 1999), has a population of approximately 15,100 (Chamber of Commerce, 2001). The region can be accessed via Highway 99 (extending from Horseshoe Bay in West Vancouver to Pemberton and Lillooet), port facilities in Squamish, a BC Railway line and airfields in both Squamish and Pemberton (Chamber of Commerce, 2001).

The climate of the area is characterized by relatively cool, dry summers and moist, mild winters with relatively little snow fall at lower elevations (Armstrong et al., 1999). The Squamish area contains a range of natural assets, including an estuary, mountains, rivers, waterfalls, lakes, ocean, forests, waterfowl, animals, and fisheries resources (District of Squamish, 1999).

Figure 5.1 Squamish Location Map



Source: GoldKeyInns, 2001.

5.1.2 INDUSTRY

The Changing Roles of Industry

Historically, agriculture, mining, logging and transportation services were the main elements of the Sea-to-Sky region's economy (Reed, 1999). By the 1880's, Squamish was world renowned for hops, its most important cash crop at that time (99 North Promotions, 2001). At the beginning of World War I, the market fell and forestry then became the community's economic focus (99 North Promotions, 2001). Since then, forestry and related industries, such as transportation and storage, have played a dominant role in the economy and employment base for the Squamish Region (Reed, 1999).

Since the 1980's, however, dependency on forestry has been declining (Clover Point Cartographics et al., 2000). Reed suggests that this decline has been the result of many factors, including a reduction in the annual allowable cut, stumpage increases, corporate restructuring, fluctuations in international market conditions, loss of production facilities and park creation. First Nation land concerns, environmental lobbying and new government policies and regulation for forestry practices have also led to a decline in the forestry industry in the area (Reed, 1999).

While forestry has been declining, other sectors have been rising in importance. The service sector, particularly tourism-related businesses, contributes to an increasing number of jobs to the economic base (Clover Point Cartographics et al., 2000). In 1993-1994, Squamish's *Tourism Development Plan* spurred the promotion of tourism as a means to diversify the economic base (Reed, 1999). In fact, tourism and forestry industries are now both considered to anchor the local economy (Reed, 1999).

Unfortunately, forestry and tourism practices are often seen to conflict with one another. Forestry, which remains a major activity in the Squamish area, frequently clashes with the interests of conservationists and, to a considerable degree, with outdoor recreation-based tourism interests (Outdoor Recreation Council of BC, 2000). Although some efforts have been made to reduce the conflicts, hostilities between the two industries still exist. However, it is important to address such issues before product development occurs. Tourists may feel unsafe if they perceive the hostilities, their satisfaction with the tourism experience in Squamish would decline, and they would likely not return to the area.

The Focus on Outdoor Recreation and Tourism

Squamish has several strengths as a tourism and outdoor recreation destination. These include its proximity to Vancouver and Whistler, scenic location, mild climate, accessibility by road, rail, water and air, a range of affordable accommodation, numerous food service establishments, a variety of cultural activities, proximity to outdoor destinations and heritage attributes (Clover Point Cartographics et al., 2000). In fact, there has been a growing importance of tourism. Approximately 22% of the workforce was directly employed in accommodation, food and beverage and other service industries in 1996 (Reed, 1999). Furthermore, visitor counts conducted by the Squamish Visitor Information Centre indicated a steady increase in tourism to the area, especially during the fall, winter and spring months (Armstrong et al., 1999). New hotels, restaurants, businesses catering to tourism and guiding/training operations for back-country, ocean and river sports are also indicative that there has been a growing importance of tourism, and have all given Squamish some infrastructure necessary for receiving visitors (Reed, 1999).

The tourism and recreation options available in the Squamish area are diverse. Many activities involve secondary wildlife viewing, such as world class mountain biking, rock and ice climbing, canoeing, kayaking, rafting, hiking, scuba diving, horseback riding, ski touring and snowmobiling (Squamish Info, 2001; Brackendale Art Gallery, 1999). Additionally, residents and tourists alike can enjoy the provincial parks that are located in the Squamish area. These parks include Alice Lake, Garibaldi, Lake Lovely Water, Murrin, Porteau Cove, Shannon Falls, and Stawamus Chief (District of Squamish, 1999).

Squamish and the surrounding area offer a wide range of natural features that can act as tourist attritions, and may help to enhance the destination's image. The features include the breathtaking oceanside Sea to Sky Highway 99; "The Chief", one of the world's largest monoliths and world-renowned climbing destinations; the majestic snow capped Mount Garibaldi (Townsearch, 1997); Shannon Falls and the Squamish River, all of which attract visitors from around the world (Clover Point Cartographics Ltd. et al., 2000).

5.1.3 WILDLIFE VIEWING

Wildlife viewing has been identified as a promising growth opportunity for the Squamish area. One of the objectives outlined in the community's 1994 *Tourism Development Plan* was to encourage wildlife viewing and interpretive activities. In 2000, a study conducted by Clover Point Cartographics et al. suggested that wildlife viewing in the area is viable from business and financial perspectives, and may have a great impact for community economic development. That study recommended that the development of wildlife viewing products should be promoted in the Squamish area (Clover Point Cartographics et al., 2000)

Eagle Viewing

Brackendale, a community within the District of Squamish, has taken a leading role in developing its position as a global wildlife viewing destination. Every winter thousands of Bald Eagles congregate on the river shores surrounding Brackendale to feed on the abundant spawning Chum salmon (Armstrong et al., 1999; Enns, 1996a). In fact, Brackendale is home to one of the world's largest Bald Eagle populations, with more than 80 percent of BC's Bald Eagles occupying the narrow six-kilometre corridor within the town's boundaries between November and March (Moore, 1995). Hundreds of these eagles can be seen at a time, and sighting two dozen or more in a single tree is not uncommon (Brackendale Art Gallery, 1998). Brackendale has therefore branded itself as "Winter Home of the Bald Eagle".

In 1994, 3,769 Bald Eagles were tallied during the annual count (Alward, 2001; Brackendale Art Gallery, 1998). This number represents the largest known group of wintering Bald Eagles ever recorded (Alward, 2001). The world-record gathering of Bald Eagles provides the foundation for many community-based winter activities in Brackendale. The most prominent of these activities is the Brackendale Winter Eagle Festival, which has been held annually for the last 15 years (Brackendale Art Gallery, 2001). The festival celebrates "the importance of the eagles to the ecosystem and to the culture of the area" (Enns, 1996b, p.11).

In addition, the Eagle Watch Interpreter Program was created in 1995. This program "is a community-based volunteer program that educates visitors and residents about wintering bald eagle biology, behaviour, and critical habitat requirements" (Lynn, 1999, p.1). Every Saturday and Sunday from early December through mid-February, and throughout the academic Christmas break, volunteers are present at the Eagle Run Viewing Site on the Squamish River. They emphasize eagle-viewing ethics, answer visitors' questions, offer use of a spotting scope, and often direct visitors to other viewing opportunities and community services (Lynn, 1999).

In order to protect the important eagle habitat in Brackendale, a 550-hectare reserve was created (Enns, 1996a). The creation of the eagle reserve was designed to provide an effective tool for managing pressures upon eagles and their habitat. The reserve restricts logging, mining, tourism and other forms of development within its boundaries (Enns, 1996a). Additionally, eagle-viewing activities are controlled. For instance, public access to certain areas is prohibited (Moore, 1995). Such measures are important because recreationists have been proven to negatively impact eagle populations (i.e. Fraser et al., 1985; Knight and Knight, 1984). The Brackendale Eagle Reserve was included in the creation of Brackendale Eagles Provincial Park in 1999. This Class A park, located in the Squamish River watershed, is 755 hectares in size and aims to ensure that critical bald eagle habitat is protected (Armstrong et al., 1999).

Other Wildlife Viewing Opportunities

Eagle viewing is not the only type of wildlife viewing possible in the Squamish area. Other species that may be suited for wildlife viewing range from estuarine animals to upland birds to small and large fur bearing mammals (Clover Point Cartographics et al., 2000). Approximately 148 bird, 55 mammal, 11 amphibian, and 5 reptile species can be found in the area (Armstrong et al., 1999). The salmon that frequent the rivers in the area have the potential for reliable viewing and attract a number of other animals (Clover Point Cartographics et al., 2000). The salmon species that can be seen during various times of the year in Squamish’s main rivers are Chinook, Chum, Coho, Pink and Sockeye (Armstrong et al., 1999). The Squamish Estuary also provides opportunity to view more than 200 species of birds and a plethora of other wildlife (Squamish Estuary Conservation Society, no date).

Previous Market Research

Only one market study has been conducted in Squamish related to wildlife viewing. This study, Eagle Watch Interpreter Program Visitor Survey (Eagle Watch Study), was conducted during the winter of January 1999. Its purpose was to determine the economic benefits that eagle viewers provide to the community. It was hoped that the Eagle Watch Interpreter

Program Committee could use the results to encourage businesses to offer sponsorship (Lynn, 1999). Results from the Eagle Watch Study that are relevant to this research are discussed in the next section and in Chapter Six: Management Implications.

5.2 INTERVIEW ANALYSES

The key informant interviews conducted in this study present the viewpoints of the respondents with respect to the questions outlined in Appendix B. Each of the proceeding sections is followed by an evaluation that, where applicable, incorporates findings from the Canadian Travel Survey and/or Domestic Tourism Market Research Study with the interview analyses in order to reveal product-market match gaps. Results from the Eagle Watch Study are incorporated in the gap analysis wherever applicable. Additionally, any suggestions for potential product development arising from the interviews are noted.

5.2.1 GENERIC COMPONENT

The generic component of a tourism product represents the rudimentary item without which there would be no product. Respondents identified two generic components of existing primary wildlife viewing products in the Squamish area: Bald Eagles and estuarine birds.

Bald Eagles

All respondents felt that the Bald Eagles have been the primary focus of wildlife viewing activities in the Squamish area. In fact, they agreed that since 1994 when the *Tourism Development Plan* outlined the desire to “encourage wildlife viewing and interpretive activities”, eagle viewing during the winter months has been the primary focus of product development. The Eagle Watch Study found that over three quarters (76%) of eagle viewers had come to Squamish specifically to observe and learn about the eagles.

All respondents agreed that Eagle viewing in the area is unique. Not only does it allow tourists to reliably view wildlife in the dead of winter, but the area also boasts the world record gathering of wintering Bald Eagles. Additionally, the image of the Bald Eagle may be especially important to Americans, and the product offered by Squamish is especially important to them. One respondent noted that since the Bald Eagle is the American symbol, and since most of the raptors and their habitat have been eliminated south of the Canadian boarder, American tourists are amazed when they see ten eagles in one tree, or 250 eagles in one stretch of the Squamish River.

Respondents felt that the Squamish area is "branded" as a Bald Eagle viewing destination. The community of Brackendale's slogan that it is "winter home of the bald eagle" makes this evident. The fact that the Squamish area is known worldwide as an eagle viewing area has made many tourists expect to see these eagles during their trips. Two respondents pointed out that wildlife viewers make trips to Squamish year round specifically to see the eagles. The respondent from the Brackendale Art Gallery explained that every day tourists from around the world visit the gallery, wanting to know where they can view the eagles. In fact, during the interview with this respondent, a German couple came into the gallery for that very purpose. Another respondent added that two or three cars are often seen at the eagle-viewing site each day during the summer. This respondent suggested that the Chamber of Commerce could put up signs that clearly indicate that eagles cannot be viewed until winter. Three respondents felt that wildlife viewers needed to be more aware of when they can view eagles.

Other Wildlife: Estuarine Birds

All respondents agreed that very few tourism products in the District of Squamish revolve around wildlife other than eagles. However, four respondents pointed out that the Squamish Estuary Conservation Society holds monthly bird counts in the estuary. This activity attracts some non-locals but is generally low-key and only avid birders/naturalists attend. All respondents felt that there has been little effort to promote these birds or other wildlife species in a tourism context.

Evaluation: Analyses of the domestic surveys indicated that wildlife viewers place importance on chances to see wildlife, birds and flowers that they do not normally see. The eagles make up the primary *generic* component of the wildlife viewing product offered in Squamish. Bald Eagles, although they can be seen elsewhere, are rarely seen in such high concentrations as they are in the Squamish area and therefore make a unique product. Respondents agreed that visitors are disappointed when they do not see Bald Eagles during the non-winter season. Very little has been done to promote other viewing products.

Gap: Viewers' expectations to see the *generic* component of the wildlife viewing product, Bald Eagles, are unfulfilled in non-winter months.

Gap: Viewers' expectations to view wildlife, birds and flowers are generally not met by wildlife viewing products other than Bald Eagles.

5.2.2 EXPECTED COMPONENTS

Interviews revealed that there are several expected components of wildlife viewing products offered in Squamish. Expected components are those items or services that represent customers' minimal expectations that exceed the generic product itself. Respondents felt that expected components should include: education/interpretation; trails/viewing platforms; a range of food and accommodation services; and outstanding scenery.

Education/Interpretation

Respondents suggested that many wildlife viewers expect education about eagles, other wildlife and their habitat during their visit to the Squamish area. To some degree, this expectation is met. Tourists can visit the information kiosks that have been built at three main eagle viewing sights. These kiosks not only educate travellers about the eagles, but also outline other important related information such as salmon, other food sources, habitat and cultural history. Additionally, viewing scopes have been set up for viewers to take close-up looks of the eagles. The Eagle Watch Interpreter Program and other guided walks and tours provide viewers' with education programming, as does the Brackendale Winter Eagle Festival.

Respondents expressed a need for additional interpretive and educational programs associated with eagles. One respondent pointed out that with the extremely high volume of visitors during eagle-viewing season, there are not enough trained guides. Furthermore, many of the outfitters who offer wildlife viewing are inadequately informed about eagles, other wildlife or their habitats. Therefore, they cannot offer the quality of learning experience expected by wildlife viewers.

Evaluation: Analyses of the domestic surveys indicated that wildlife viewers are relatively well educated, that they place importance on opportunities to increase their knowledge, and that they like to take nature and/or science learning trips. Respondents acknowledged that viewers desire education about wildlife and their habitat, but admit that, in general, the facilities and operators in Squamish do not adequately meet these expectations.
Gap: Education/interpretive components of tourism products do not meet the expectations of wildlife viewers.

Trails and Platforms

Three of the respondents felt that viewers are expecting more trails when they visit Squamish. Respondents noted that during the eagle-viewing season, viewers have often expressed their desire to explore trails in order to get a better look at wildlife and to travel through many of Squamish's scenic locations. Three respondents emphasized that the enhancement and creation of trail systems through Squamish could be used to attract wildlife viewers and other tourists to the area. One respondent suggested that a trail system through many different ecosystems, such as swamp, meadow and forest, could be developed. These trails, if accompanied by interpretive signage, could create the educational component that wildlife viewers are seeking and could be enjoyed throughout the year regardless of the absence of eagles. These trails would also be enjoyed by residents.

Respondents also emphasized the need for the development of eagle viewing platforms. Tourists who come to observe the eagles not only expect trails, but also desire designated locations from which they can better view the eagles. Respondents noted that without adequate platforms, large numbers of wildlife viewers walk into culturally and environmentally sensitive areas and can place numerous stresses upon eagle populations. The lack of viewing platforms and trail systems has even led to some friction in the community. Two respondents noted that many private landowners have become angry when wildlife viewers trespass onto their properties in order to get a better view of the eagles. Furthermore, residents have become disgruntled when access has been restricted in areas that they previously were allowed to travel through.

Evaluation: Analyses of the domestic surveys indicated that walking is one of the most frequented activities by wildlife viewers. Respondents felt that Squamish needs a more extensive trail system to meet the needs of wildlife viewers. Additionally, more viewing platforms are needed.

Gap: Trail systems and viewing platforms in Squamish do not meet the expectations of wildlife viewers and are inadequate from social and environmental standpoints.

Food Services

All respondents felt that Squamish offers an adequate amount and variety of food services to meet the expectations of wildlife viewers. Food services range from fast food to casual sit-down to expensive, fancy dining. Two respondents noted that while the region may not lack food services, wildlife viewers are often not aware of the variety of restaurants available to them, even though they are advertised in such media as Squamish information pamphlets and booklets. Respondents suggested that fast food restaurants are visible and easily accessible from the main highway and attract a large number of wildlife viewers. Meanwhile, the more quaint, attractive and locally distinctive cafes and dining areas are tucked away, but have the potential to satisfy travellers' needs and can add to an overall unique tourism experience in Squamish.

Evaluation: Analyses of the domestic surveys revealed that dining at inexpensive restaurants and experiencing local cuisine are important trip motivations for wildlife viewers. Additionally, the survey analyses indicated that both informal/casual dining with table service and dining in fast food restaurants were highly frequented activities by wildlife viewers. Squamish offers a variety of food services to cater to tourists' needs, yet viewers are generally unaware of the more locally unique casual dining facilities.

Gap: Viewers' expectations of experiencing local cuisine are not met due to lack of knowledge about such establishments.

Accommodation

Overall, respondents indicated that Squamish provides an adequate amount and variety of accommodation types to meet the expectations of wildlife viewers. They noted that Squamish offers a range of affordable accommodations, including motels, cabins, bed and breakfasts, camping facilities, and both chain and unique hotels. However, two respondents felt that there are not enough campgrounds for wildlife viewers and other outdoor recreationists during the summer months. They pointed out that Alice Lake Provincial Campground is full all summer long. Other respondents did not agree that more campgrounds are needed in the area. Winter camping was not considered important. Respondents felt that wildlife viewers generally prefer to stay indoors during this rainy season. One respondent pointed out that winter camping is available.

Evaluation: Analyses of both domestic surveys suggested that wildlife viewers use a variety of accommodation types, but place the most importance on staying at campgrounds. They also seek budget accommodations. Respondents indicated that Squamish generally meets the expectations of wildlife viewers by offering a variety of accommodation types, but *may* lack enough campgrounds during the busy season.

Gap: Squamish is unsure as to whether there are adequate campground facilities to meet wildlife viewers' accommodation expectations.

Outstanding Scenery

One respondent stated that the diversity of ecosystems and the resulting outstanding scenery are factors that make Squamish a unique wildlife viewing destination. The area is home to an abundance of wild lands, including rivers, ocean, mountains, and almost everything in between, yet is relatively close to urban areas. Another respondent added the ocean-mountain interface makes Squamish a truly unique setting for tourism activities to take place in. It creates a breathtaking setting for tourists to engage in a plethora of outdoor activities. One respondent expressed that while the unique physical setting associated with Squamish adds to the tourism experience in the area, its full potential for tourism has not been capitalized.

Evaluation: Analyses of the domestic studies revealed that outstanding scenery is a significantly important travel motivation for wildlife viewers. Analyses also indicated that wildlife viewers frequently participate in sightseeing, driving to scenic places and visiting mountainous areas. The Squamish area offers wildlife viewing in a highly scenic location and thus visitors' expectations for outstanding scenery are met. However, potential visitors may be unaware of the unique outdoor experience that awaits them.

Gap: Outstanding scenery is not adequately incorporated into the development and promotion of wildlife viewing products.

5.2.3 AUGMENTED COMPONTENTS

Augmented components of tourism products are those offerings that go beyond what travellers think they need or have become accustomed to expect. They act as motivational factors to attract tourists and can give a destination a competitive advantage over other destinations. This section outlines how respondents felt the District of Squamish currently exceeds the expectations of wildlife viewers.

Brackendale Winter Eagle Festival and Annual Count

Respondents felt that the Brackendale Winter Eagle Festival and Count, which has been held annually over the past 15 years, is the main factor that motivates many travellers to visit the area. This month-long celebration, sponsored by the Brackendale Art Gallery, the Squamish Estuary Conservation Society (SECS) and the Brackendale Eagle Reserve Society, offers numerous activities for both residents and tourists. For example, activities in the upcoming (January, 2002) festival include:

- Daily walking or river float tours to prime eagle viewing areas;
- "The Natural World Lecture Series", which are Saturday evening slide shows that educate people about Eagles, other wildlife, and their habitats;
- Eagle art show;
- Annual Eagle Photo Contest; and
- Eagle count recap.

Eagle viewing in Squamish is further augmented by the several methods that enable tourists to observe eagles. Commercial outfitters offer trips to view eagles via horseback, ATV, land rovers, mountain bikes, walks or hikes, skis, snow shoes, river rafts and kayaks.

Many respondents felt that there could be more development associated with Eagle viewing. Two respondents pointed out that businesses other than guides or outfitters are just beginning to recognize the significance of tourism related to the eagles. Respondents suggested that these businesses could benefit from and add to wildlife viewing opportunities offered in Squamish.

Outdoor Recreation

The abundance of high quality outdoor recreation opportunities in Squamish also augments wildlife viewing products. Activities include sightseeing at Shannon Falls, camping at Alice Lake Provincial Park and other local campgrounds, river rafting, windsurfing, horseback riding, world-renowned mountain climbing at "the Chief". Mountain biking also draws in large numbers of tourists, especially during the "Cheakamus Challenge", held in the early fall, and "Test of Metal" race held in the early summer. The Test of Metal race has now evolved into a weekend “Squamish Mountain Bike Festival”. Three respondents noted that due to these many activities, Squamish is becoming known as the “outdoor recreation capital of Canada”. One respondent stated that while these activities on their own are generally not unique, the fact that Squamish has a combination of high quality outdoor activities all in one area is quite different. Some respondents felt that Squamish could incorporate both wildlife viewing and other activities into the overall product that the destination offers in order to attract these outdoors-type people. However, wildlife viewing is generally not promoted in conjunction with these other activities. The Eagle Watch Study revealed that some eagle viewers may have been persuaded to spend a night in Squamish had they been aware of other activities that the area had to offer.

Evaluation: Analyses of the domestic survey data revealed that approximately a third of tourists who partake in wildlife viewing also tend to participate in ethnic culture and events, such as festivals. Squamish offers the annual Winter Bald Eagle Festival, among other festivals, which augments the wildlife viewing product. Analyses of the domestic survey responses also revealed that wildlife viewers tend to engage in a variety of other outdoor activities. Squamish offers a variety of high quality outdoor recreation opportunities that would likely meet the needs of wildlife viewers, but present wildlife viewing product development has generally not focused on bringing these activities together in one offering.
Gap: The variety of outdoor activities that Squamish has to offer is not adequately incorporated into the development and promotion of wildlife viewing products.

5.2.4 POTENTIAL COMPONENTS

Potential components of tourism products represent everything that could attract and hold potential customers. Respondents identified several potential components for wildlife viewing product development in the Squamish area: the Squamish Estuary, salmon viewing, culture and general tourism development.

Squamish Estuary

Three respondents proposed that, besides eagles, other bird species have a great potential to attract wildlife viewers to the Squamish area. In particular, respondents suggested that birding in the Squamish Estuary could be further developed to attract more tourists year-round. They felt that wildlife observation in the estuary is a unique product to offer wildlife viewers because “it is one of the richest urban estuaries around” and that “there are relatively few of them that are in tact and accessible”.

Respondents noted that the monthly bird counts at the Squamish Estuary have the potential to draw in more non-locals and would offer year-round wildlife viewing opportunities to travellers. Three respondents reported that trumpeter swans, which can also be viewed in the winter, could potentially attract wildlife viewers. The potential to offer birdcall interpretation and education about amphibians was also suggested. One respondent added that promoting photography in the estuary could also be used to attract tourists.

Evaluation: Birds and perhaps other amphibians have the potential to form an additional *generic* component of wildlife viewing products offered in Squamish. Products that offer chances to view these creatures would complement Bald Eagle viewing for they would be available year-round.
Opportunity: Enhance, develop and promote tourism activities in the Squamish Estuary.

Salmon Viewing

Respondents emphasized that the Return of the Salmon Festival is an activity that has great potential to draw in tourists in the future. This festival, held for the first time last November, will likely become an annual event. It focused on educating community members about the importance of salmon to the eagles and highlighted the historical and cultural associations with the salmon. One respondent felt that attracting tourists to view the salmon and participate in the festival would take little effort. Respondents generally agreed that this festival would complement the Winter Bald Eagle Festival in two ways. First, it would provide complementary education in the sense that residents and visitors would be more aware of the issues surrounding the salmon, which are vital to the survival of the eagles. Second, the Return of the Festival would extend the tourism season. The Eagle Festival occurs in winter, and the Salmon Festival would attract tourists during the late fall.

Some respondents felt that in addition to the festival, general salmon viewing could be further developed. One respondent suggested that the fish hatchery and trails along the spawning channels could be promoted for use by tourists. They could be further enhanced if the small amount of interpretive signage along the rivers was increased.

Evaluation: Salmon have the potential of forming another *generic* component of wildlife viewing products offered in Squamish. The Return of the Salmon Festival and salmon viewing have could be used to attract tourists during the off-season.
Opportunity: Develop and promote salmon viewing and the Return of the Salmon Festival.

Culture

Many respondents thought that cultural components tied to wildlife have not been developed to their full potential. One respondent felt that First Nations could become more involved with wildlife viewing by offering dances and art revolving around eagles. It was also suggested that First Nations could become more involved in the Return of the Salmon Festival. Their cultural and historical ties to salmon could be used to educate tourists.

One respondent thought that existing local artisans could be better promoted. Through their products, artisans could reinforce the images of the importance of Squamish's wildlife.

Evaluation: Images and education about Squamish's important wildlife could be enhanced through the development of cultural tourism products.
Opportunity: Develop wildlife-related cultural tourism products.

General Tourism Development

One respondent noted that there is great potential for tourism development where the Royal Hudson train disembarks its passengers in Squamish. The Royal Hudson makes it way with tourists from North Vancouver along Howe Sound, and stops for two hours in Squamish. However, one respondent felt that the location where the train unloads currently resembles an “industrial wasteland”. Travellers stepping off the train to spend a couple hours in Squamish usually do not know where to go, and have little exposure to any wildlife in the area. However, artisan shops, cafes and other tourist facilities could be built to enhance the character of the area. While this type of development would not involve direct wildlife viewing activities, through its offerings it could be used to reinforce and promote wildlife viewing opportunities in the area. For example, shops could focus on estuary or eagle viewing themes. They could also provide stopover tourists with information about wildlife viewing and other outdoor recreation opportunities in the area. This may entice Royal Hudson travellers to revisit the Squamish area on a future trip.

Evaluation: The area where the Royal Hudson disembarks its tourists currently lacks tourism appeal. Development of this area could be used to attract train travellers in the future and to promote Squamish’s wildlife image.
Opportunity: Develop the area where the Royal Hudson passengers disembark.

5.2.5 KNOWLEDGE OF THE NATURE OF DEMAND FOR WILDLIFE VIEWING

Market Research

In general, respondents felt that very little market research related to wildlife viewing has been conducted for the Squamish area. The District of Squamish itself has not undertaken any market research related to wildlife viewing. However, several of the respondents were aware of the Eagle Watch Study in 1999. It revealed several socio-demographic and trip characteristics of wildlife viewers visiting Squamish. Its results were presented to Council, but were not incorporated into any plans for wildlife viewing product development.

One respondent pointed out that wildlife viewers' needs are dependent upon numerous factors. These include the length of stay, the amount of necessary gear that they own, skill level/experience, time of year, and what their goals are. For example, an expert may not require a guide – they may just need a map and guidebook. Beginners, on the other hand, would likely need fully trained guides to take them to the mid or backcountry regions. However, further market research is needed in order to assess the general skill level, requirements and desires of Squamish's wildlife viewers.

Evaluation: In order to fulfill wildlife viewers' needs and expectations, local market research must occur and the results need to be incorporated into product development. Only one market research study known to respondents has been conducted to reveal the characteristics of wildlife viewers in Squamish. Its results have not been incorporated into the development of wildlife viewing products.
Gap: Limited market research has led to insufficient knowledge about wildlife viewers' characteristics and expectations.
Gap: Knowledge about demand has not been incorporated into product development.

5.2.6 OTHER PRODUCT DEVELOPMENT CONSIDERATIONS

During the interviews, respondents outlined concerns that need to be addressed when developing wildlife viewing in the Squamish area. These concerns, both environmental and socio-cultural in nature, are described, and priorities for product development based on the priorities are brought forth in this section.

Environmental Concerns

Most respondents emphasized the importance of addressing environmental concerns. They felt that while eagle viewing is important to Squamish, protecting eagles and their habitat is the priority. Three respondents indicated that a major concern for the development of eagle viewing is the stresses that crowds of tourists can create upon the eagles and their vital habitat. A lack of viewing platforms and adequate trail systems can lead to wildlife viewers trampling on sensitive eagle habitat. One respondent suggested that viewers should be better educated about viewing etiquette. Additionally, two respondents voiced their concern over the impact that noisy, wandering dogs and unmanaged children can have on the eagles.

One respondent also stressed the need for more education amongst operators. Some outfitters have been trained to be respectful to eagles, other wildlife and sensitive areas. Others have not and their activities sometimes conflict with what is best for the eagles. One respondent noted that a river raft operators code of ethics has been developed, but little else has been done to ensure environmentally sensitive practices among other businesses.

Evaluation: Several activities threaten the sustainability of eagles, other wildlife and their habitat. Respondents stressed that, above all else, protection of these creatures must occur.
Priority: Ensure that all wildlife viewing development first considers the sustainability of wildlife and their habitat.

Socio-Economic Concerns

Not all residents of the District of Squamish support tourism development. As one respondent pointed out, there is a “lack of community understanding and support” for tourism development. This respondent noted that a number of residents are not aware of the wildlife viewing potential, and many have not even been to the estuary. Another respondent explained that there are some members of the logging community who do not want Squamish to become a service-oriented town. They sometimes view environmentalists and tourists as a threat to their jobs. Some of these residents have “forestry feeds my family” bumper stickers on their vehicles. Other residents would like Squamish to be more diversified by having both logging and the service industry contributing to the local economy. Some of their bumper stickers read, “forestry *and* tourism feed my family”. This was the result of conscious effort by the community to reduce animosity between the two industries.

Another area of contention between some residents is related to the notion that Brackendale, not Squamish, has been promoted as the Bald Eagle viewing destination. Three respondents acknowledged that the Brackendale Art Gallery Society has been responsible for raising awareness of the eagles and promoting Brackendale as an eagle viewing destination worldwide, and therefore deserves the attention that it has received. However, one respondent pointed out that the eagles do not belong to Brackendale and that they are found in Squamish too. This conflict between residents has had an impact on tourists. Two respondents indicated that the market research done during the Eagle Watch Program revealed that travellers were confused about whether they are viewing eagles in Brackendale or Squamish.

Evaluation: Analyses of the domestic surveys revealed that wildlife viewers place high importance on interesting and friendly local people and on personal safety. The conflicts between some members of the logging community and the tourism industry, if known to tourists, may make tourists believe that locals are not friendly and that their personal safety may be in jeopardy. Furthermore, the confusion between Squamish and Brackendale as the primary eagle viewing destination needs to be addressed from both community and tourist standpoints.

Priority: Further efforts should be made to eliminate hostilities between the forestry and tourism industries.

Priority: Efforts should be made to reduce the confusion among residents and tourists as to whether Brackendale or Squamish is the primary host for eagle viewing.

Lack of support from the District of Squamish has also been of concern to some respondents. In 1994, Squamish's *Tourism Development Plan* outlined the desire to increase wildlife viewing and interpretive activities. However, three respondents emphasized that the District of Squamish has done little, if anything, to enhance or develop wildlife viewing. The District has not financially supported wildlife viewing development.

One respondent noted that the only help that the District has given to the wildlife viewing industry is the provision of directional signs to eagle watch sites, as well as some interpretive trail signs. Respondents generally agreed that the District should become more involved in the development and promotion of wildlife viewing activities.

Evaluation: Wildlife viewing is an activity of recognized importance to the community of Squamish. The District, however, has generally not supported or initiated wildlife viewing product development.

Priority: The District should become more involved in the planning, development and promotion of wildlife viewing.

5.3 SUMMARY OF CASE STUDY FINDINGS

Gaps, opportunities and priorities for product development found in this case study are summarized in Table 5.1. Recommendations for overcoming these gaps, capitalizing on opportunities and incorporating priorities into product development are made in Chapter Six: Management Implications.

Table 5.1 Summary of Gaps, Opportunities and Priorities

GAPS	Viewers' expectations to see the *generic* component of the wildlife viewing product, Bald Eagles, are unfulfilled in non-winter months.
	Viewers' expectations to view wildlife, birds and flowers are generally not met by wildlife viewing products other than Bald Eagles.
	Education/interpretive components of tourism products do not meet the expectations of wildlife viewers.
	Trail systems and viewing platforms in Squamish do not meet the expectations of wildlife viewers and are inadequate from social and environmental standpoints.
	Viewers' expectations of experiencing local cuisine are not met due to lack of knowledge about such establishments.
	Squamish is unsure as to whether there are adequate campground facilities to meet wildlife viewers' accommodation expectations.
	Outstanding scenery is not adequately incorporated into the development and promotion of wildlife viewing products.
	The variety of outdoor activities that Squamish has to offer is not adequately incorporated into the development and promotion of wildlife viewing products.
	Infrequent market research has led to insufficient knowledge about wildlife viewers' characteristics and expectations.
	Knowledge about demand has not been incorporated into product development.
OPPORTUNITIES	Enhance, develop and promote tourism activities in the Squamish Estuary.
	Develop and promote salmon viewing and the Return of the Salmon Festival.
	Develop wildlife-related cultural tourism products.
	Develop the area where the Royal Hudson passengers disembark.
PRIORITIES	Ensure that all wildlife viewing development first considers the sustainability of wildlife and their habitat.
	Further efforts should be made to eliminate hostilities between the forestry and tourism industries.
	Efforts should be made to reduce the confusion among residents and tourists as to whether Brackendale or Squamish is the primary host for eagle viewing.
	The District should become more involved in the planning, development and promotion of wildlife viewing.

CHAPTER SIX: MANAGEMENT IMPLICATIONS

This chapter outlines the management implications based on the research findings of this study. The first section presents general recommendations for wildlife viewing product development in British Columbia. These recommendations were derived from the analyses of the Canadian Travel Survey and the Domestic Tourism Market Research Study. The next section highlights specific opportunities for development in the Squamish area, based on analyses of the case study interviews. Specifically, this section suggests methods for product development that could aid in closing product-market gaps, as well as *gap 1* and *gap 2* occurrences.

6.1 GENERAL PRODUCT DEVELOPMENT RECOMMENDATIONS

6.1.1 GENERIC PRODUCT COMPONENTS

Natural Features

For avid wildlife viewers, the fauna of a destination may represent the generic component of the tourism product (without which, there would be no product). However, data analyses from this research found that for many wildlife viewers, observing, studying or photographing fauna is one of the many activities that they participate in during their trips. Other important activities for viewers include walking, swimming, water sports (such as kayaking/boating), fishing, cycling, hiking, climbing, visiting natural ecological sights, driving to scenic places, visiting mountainous areas and national parks. Each of these activities directly or indirectly relies upon high quality natural resources (such as water bodies, mountains, forests and wildlife) in order to attract tourists. A variety of natural resources can therefore serve as *generic* components of the overall tourism product being offered at a wildlife viewing destination.

Recommendation 1-1: Develop and promote several natural features of a destination as the *generic* component.

1-1A: Offer packages that include a variety of outdoor activities rather than focusing on just one.

1-1B: Destinations should focus on providing pre-trip information about the variety of high quality natural resources and associated activities that they have to offer to wildlife viewers and other outdoor enthusiasts.

Unique Wildlife

Results from the domestic studies suggest that wildlife viewers are motivated to visit areas that offer chances to see wildlife, birds and flowers that they do not normally see. Some viewers who live in urban environments may not get a chance to see much wildlife at all, and could be easily enticed to visit a neighbouring community to view wildlife.

Recommendation 1-2: Develop and promote wildlife viewing products that focus on species that are unique to the destination or that would be unique to potential visitors.

1-2A: Develop and promote unique wildlife viewing products that will attract domestic travellers. For instance, many city dwellers may not normally get to see montane flora and fauna and may be attracted to areas that offer such viewing opportunities. Similarly, people who live inland may be attracted to view marine or estuarine wildlife.

1-2B: Develop and promote unique wildlife viewing products that will attract international travellers. Many wildlife species in British Columbia are quite different than species found elsewhere in the world. By highlighting species that are not seen in other parts of the world in tourism products, destinations may be able to attract more foreign wildlife viewers.

6.1.2 EXPECTED AND AUGMENTED PRODUCT COMPONENTS

This study's data analyses revealed several characteristics of wildlife viewers that need to be considered in order to meet or exceed their expectations when developing tourism products. Sometimes augmented components become expected when tourists become used to receiving a certain type or quality of tourism product. The differences between the two components are therefore sometimes hard to pinpoint. Since the domestic surveys did not specifically ask respondents to identify which aspects of tourism products are expected and which are augmented, these two components could not be fully separated. The following section therefore makes recommendations that, to some tourists, would meet their expectations, while to others, would exceed them.

Expectations Associated with Socio-Demographic Characteristics

Different socio-demographic segments of the population have distinct needs and preferences. This study has shown that viewers range from children to adults over 55 years old and come from households with a range of incomes. Tourism infrastructure should therefore be developed keeping these characteristics in mind.

Recommendation 1-3: Wildlife viewing products should be developed to accommodate tourists of all ages.

1-3A: Ensure that services and facilities adequately meet the needs of all ages. For example, easy walking and hiking trails should be developed so that children and seniors may enjoy them. Younger adults could tackle trails that are more difficult.

Recommendation 1-4: Destinations should ensure that services and facilities range from very affordable to high-priced luxury.

1-4A: Accommodation should range from budget (campgrounds, inexpensive motels, cabins and bed and breakfasts) to luxury (high quality, expensive hotels and bed and breakfasts).

1-4B: There should be a good selection of restaurants, ranging from casual fast food chains and cafeterias, to expensive, more formal dining.

1-4C: Activities should range from free and self-guided to organized with associated costs. Even if tourists partake in free activities, they are likely to spend their money on other things in the community, such as food services.

Focus on Family

Almost 65% of wildlife viewers responding to the 1998 Canadian Travel Survey in Western Canada indicated that children from their households accompanied them on their trip. Wildlife viewers travelling with children would likely have different expectations or desires than those without children. The needs families therefore should be incorporated into product development.

Recommendation 1-5: Offer wildlife viewing programs/activities that would interest children.

1-5A: Destinations should offer wildlife viewing programs that are interactive and educational, yet easy to understand and fun. Children may be interested in wildlife sound interpretation or in studying frogs or other pond life.

1-5B: Destinations could promote their activities in children's nature magazines.

Recommendation 1-6: Ensure that tourism products meet and exceed the expectations of families.

1-6A: Include several outdoor activities in the mix of products offered to wildlife viewers with families. Analysis of the Canadian Travel Survey revealed that wildlife viewers travelling with children tended to participate in Walking, swimming, water sports (such as boating) and fishing. These activities should therefore be the focus for product development at destinations that attract or wish to attract families.

6.1.3 POTENTIAL PRODUCT COMPONENTS

Affordable Getaways

Analysis of the Domestic Tourism Market Research Study revealed that wildlife viewers believe that money spent on travel is well spent and they like to take trips whenever they can afford to do so. They also tend to take frequent short trips of a few days each year.

> **Recommendation 1-7: Efforts should be made to attract wildlife viewers by offering affordable short-duration getaways.** Summer trips are most common among wildlife viewers. Offering shorter getaways during the shoulder seasons could help to alleviate some of the seasonality problems associated with wildlife viewing. With British Columbia's relatively mild climate, many communities could potentially offer products during shoulder seasons. An estimated 176 bird species can be viewed during non-summer months in BC, and raptors, waterfowl, shorebirds and montane wildlife are available to view year-round (Ethos Consulting et al., 1988).
>
> > **1-7A:** Weekend trips should be offered throughout the year to entice those viewers who work during the week or who wish to travel with school-aged children.
> >
> > **1-7B:** High value mid-week trips should be offered year-round to attract retired wildlife viewers or those who do not work during the week.

Outdoor Adventure Experiences

This study has found that wildlife viewing is just one of the many activities that viewers participated in during their trips. Previous studies have indicated a significant proportion of the Canadian population participates in non-commercial or indirect wildlife viewing (Federal-Provincial Task Force 2000, 1993; Ethos Consulting et al., 1991). Destinations with abundant or unique wildlife could focus on developing and promoting direct wildlife viewing opportunities to these people.

Recommendation 1-8: Develop and promote wildlife viewing packages to indirect wildlife viewers.

1-8A: Offer direct wildlife viewing opportunities to tourists who engage in indirect viewing activities, such as camping, horseback riding, boating, hiking, climbing, cycling and skiing. For instance, campers at Alice Lake Provincial Park could be encouraged to participate in interpretive studies or tours at the Squamish Estuary.

1-8B: Provide pre-trip information to indirect wildlife viewers about the wildlife viewing opportunities available at a destination.

6.2 RECOMMENDATIONS FOR THE DISTRICT OF SQUAMISH

Respondents to the case study interviews identified several concerns and suggestions for wildlife viewing product development in the District of Squamish, which are addressed in this section. The first segment outlines some of the overriding priorities that respondents felt should be incorporated into product development, and makes recommendations as to how this may be achieved. The following three sections examine product-market gaps for generic, expected, and augmented and potential components of wildlife viewing products in the Squamish District. Recommendations for overcoming these gaps are also presented. The final part outlines *gap 1* and *gap 2* occurrences, and also makes recommendations for overcoming these gaps.

6.2.1 OVERRIDING PRIORITIES

Sustainable development involves managing our activities in ways that balances social, economic and environmental considerations to meet our needs, as well as the needs of future generations. Environmental and socio-economic concerns related to wildlife viewing product development arose during the case study interviews. Based on these concerns, priorities for product development were established. While these priorities may not be central to a product-market match gap analysis, they are of utmost importance from a product development perspective. These priorities should be addressed before wildlife viewing development occurs.

Environmental Priorities

Wildlife viewing and other forms of outdoor recreation are activities of increasing importance to the Squamish area. Unfortunately, as these activities grow in popularity, they threaten the very resources upon which they depend. Respondents were very concerned about how tourism and non-tourism related activities threaten wildlife and their habitat in the Squamish area. They stressed that, above all else, protection of wildlife (especially Bald Eagles) and their habitat must occur.

Priority: Ensure that all wildlife viewing development and activities first consider the sustainability of fauna and their habitat.

Recommendation 2-1: Protect wildlife and critical habitat. While steps have been taken to ensure the protection of some of the critical habitat for Bald Eagles, activities within and outside of the Eagle Park still threaten their sustainability.

2-1A: Undertake environmental impact assessments for wildlife viewing and other tourism/recreation development and activities that may have a significant adverse impact on wildlife and habitat.

2-1B: Develop and implement limits of acceptable use and growth management plans so that undesirable levels of ecological change do not occur.

2-1C: Create and implement long-term visitor plans to ensure the sustainable use of wildlife habitats.

2-1D: Create guidelines or codes of conduct for wildlife viewing operators. A list of operators following these guidelines should be available so that tourists are made aware of the more environmentally sensitive business operations.

Recommendation 2-2: Provide substantial education about wildlife, habitat and the impacts that various activities can have on sustainability.

2-2A: Develop educational material for tourism operators about the impacts that their activities can have on wildlife and habitat. This should be developed in conjunction with guidelines/codes of conduct.

2-2B: Educate visitors so that their appreciation and understanding of environmental issues surrounding wildlife are enhanced. Signs, websites, literature, and briefings can all be used as educational tools.

2-2C: Educate residents not only about the impacts that they can have on wildlife and habitat, but the benefits that they receive from sustaining wildlife populations.

Socio-Economic Priorities

Conflicts can often arise in a community when tourism development does not take residents' attitudes, cultural values and concerns into account. Respondents had some socio-economic concerns related to wildlife viewing development in Squamish that need to be addressed.

Priority: Ensure that hostilities between forestry and tourism industries are minimized.

Recommendation 2-3: Further efforts should be made to encourage the "forestry *and* tourism feed my family" mindset in the community.

2-3A: Educate residents about how wildlife viewing and other aspects of the tourism industry benefit the community as a whole.

2-3B: Encourage more partnerships between the forestry and tourism industries. Local forestry-related businesses should be encouraged to provide resources and equipment to the tourism industry. This will result in reduced expenditure leakage and will encourage value-added industry at the local level, thereby economically benefiting these local companies (Anderson/Fast, 1996).

2-3C: Establish specific priorities for wildlife viewing development. Some forms of development may be more desirable and beneficial to residents. Members of the forestry community may be more likely to support tourism and wildlife viewing development if it is considered to enhance their quality of life.

Priority: Ensure that the confusion as to whether Brackendale or Squamish is the primary host for eagle viewing is diminished.

Recommendation 2-4: Establish community solidarity for the District as a whole.

2-4A: Create or enhance partnerships for wildlife viewing between stakeholders in the communities of Brackendale and Squamish. Community solidarity may be enhanced if residents are working towards the same goal.

2-4B: Agree upon and promote a catchphrase to describe eagles in the area. *Either* "the eagles of Squamish" *or* the "eagles of Brackendale" should be chosen. Alternately, efforts could be made to combine both names or to create a new catchphrase (e.g. the Sea-to-Sky eagles, featured in the communities of Brackendale and Squamish or Valley of the Eagles).

2-4C: Combine efforts of the communities in the Squamish Valley to take an ecosystem approach to wildlife viewing management.

Recommendation 2-5: Educate tourists about Brackendale and Squamish.

2-5A: Provide more comprehensive pre-trip information about the area that educates tourists about the history of Brackendale and Squamish, and how the two fit together. Press releases, the Internet, brochures and other media could be used.

Priority: The District of Squamish should become more involved in the planning, development and promotion of wildlife viewing.

Recommendation 2-6: Ensure that the District is fully aware of the importance of wildlife viewing to the community.

2-6A: Regular visitor surveys should be conducted to assess the amount of money spent in Squamish during wildlife viewing trips. The results from the 1999 Eagle Watch Survey provided some expenditure data related to eagle viewing. Such surveys need to be conducted on a more frequent and regular basis. Their results should be presented to the local council and to the community. The District is more likely to become involved if the benefits of wildlife viewing activities are fully realized.

6.2.2 GENERIC COMPONENT

The generic component of tourism products represents the core item without which there would be no product. Results from the case study interviews revealed that Bald Eagles formed the primary generic component of wildlife viewing products offered in the area, but that they were only available for viewing in the winter.

Gap: Viewer's expectations to see the *generic* component of the wildlife viewing product, Bald Eagles, are unfulfilled in the non-winter months.

Recommendation 2-7: Ensure that visitors are made aware of the months during which they can view Bald Eagles.

2-7A: Ensure that pre-trip information clearly states that eagles cannot be viewed during non-winter months. Before arrival in Squamish, tourists could be informed about the timing of eagle viewing via Internet sites, travel brochures and books, at non-local tourist information centres and through information provided at popular tourist destinations in Whistler and Vancouver.

2-7B: On-site information should explicitly inform wildlife viewers that eagles are only viewable in the winter. Although some signage already addressed this, a couple of respondents felt that the information provided was not adequate or not very noticeable.

Recommendation 2-8: Offer more eagle-related tourism products during non-winter months.

2-8A: Locals could give organized, interpretive lectures, walks or slide shows to educate non-winter tourists about the eagles, and perhaps to encourage them to return to Squamish to participate in the Winter Bald Eagle Festival.

2-8B: First Nations could offer eagle-related dances, stories, feasts and artwork throughout the year.

Gap: Viewer's expectations to view wildlife, birds and flowers are generally not met by wildlife viewing products other than Bald Eagles.

Recommendation 2-9: Enhance, develop and promote year-round opportunities to view wildlife.

2-9A: Enhance, develop and promote tourism activities in the Squamish Estuary. Bird watching, birdcall interpretation, amphibian studies, guided tours and nature photography could be developed or enhanced, and better promoted. An estuary interpretive centre, as recommended in the Eagle Watch Market Study, could be built.

2-9B: Promote the Return of the Salmon Festival to prospective tourists. This community event has the potential to draw in tourists, especially from Vancouver and Whistler. It would extend the wildlife viewing season.

2-9C: Investigate the feasibility of developing midcountry and backcountry wildlife viewing opportunities during the summer.

6.2.3 EXPECTED COMPONENTS

Results from both the case study interviews and from the Eagle Watch Market Study reveal that wildlife viewers have several expectations when visiting the Squamish area. When viewers' expectations are not met, product-market match gaps occur. The following section outlines some of the product-market gaps that occur in Squamish, and makes recommendations for overcoming them.

Education/Interpretation

Gap: Education/interpretive components of tourism products do not meet the expectations of wildlife viewers.

Recommendation 2-10: Enhance learning experiences offered to tourists.

2-10A: Encourage operators to offer more education/interpretation about wildlife and habitats in the products they offer. Proper training of operators is required for this.

2-10B: Increase interpretive signage along trails.

Trails and Platforms

Gap: Trail systems and viewing platforms do not meet the expectations of wildlife viewers and are inadequate from social and environmental standpoints.

Recommendation 2-11: Create more walking and hiking trails.

2-11A: Develop trails in areas that are least likely to have adverse environmental and social impacts.

2-11B: A variety of trails should be created to please tourists with a range of skill levels. Easy, interpretive frontcountry trails could be connected to more difficult backcountry ones.

2-11C: Interpretive trails could be built through a variety of ecosystems. This would not only satisfy wildlife viewers' expectations for a more elaborate trail system, but would also provide an additional educational/interpretive component sought out by viewers.

Recommendation 2-12: Develop additional viewing platforms

2-12A: Additional platforms should be developed in areas that have the least potential to disturb wildlife.

Food Services

Gap: Viewers' expectations of experiencing local cuisine are not met due to lack of knowledge about such establishments.

Recommendation 2-13: Increase viewers' awareness of the locally unique restaurants that Squamish has to offer.

2-13A: Pre-trip information should highlight the unique restaurants that Squamish has to offer. A comprehensive website could be created as a restaurant guide. The website could provide links to restaurants' individual web pages, which could feature menus, specials, hours of operation and location. While the Chamber of Commerce website does this to some extent, many of the restaurants do not have web sites, and some of the locally unique establishments are not even listed.

2-13B: A restaurant guide, as recommended in the Eagle Viewer Study, should be created. It should contain a map and sample menus, and should be distributed at key locations throughout the Squamish area.

Accommodations

Gap: Squamish is unsure as to whether there are adequate campground facilities to meet wildlife viewers' accommodation expectations.

Recommendation 2-14: Conduct market research in the summer months to establish whether more camping facilities need to be developed.

Outstanding Scenery

Gap: Outstanding scenery is not adequately incorporated into the development and promotion of wildlife viewing products.

Recommendation 2-15: Incorporate the range of different ecosystems into product development and promotion.

2-15A: Pre-trip information should describe the beautiful mountain, forest, swamp, estuary, freshwater and marine environments that Squamish has to offer.

6.2.4 AUGMENTED AND POTENTIAL COMPONENTS

Outdoor Recreation

Wildlife viewers partake in a variety of outdoor activities during their trips. The analysis of the Eagle Watch Survey found that eagle viewers are often unaware of the different recreational options available to them, and therefore only spend a couple of hours in Squamish.

Gap: The variety of outdoor activities that Squamish has to offer is not adequately incorporated into the development and promotion of wildlife viewing products.

Recommendation 2-16: Incorporate other outdoor activities into wildlife viewing products.

2-16A: Display a local business guide with maps at the Eagle Watch Shelter (as recommended by the Eagle Watch Survey analysis).

Royal Hudson Unloading Area

The area where the Royal Hudson tourists disembark currently is not very attractive to travellers. However, if developed, this area could reinforce the friendly atmosphere and outdoor focus of Squamish.

Recommendation 2-17: Investigate the feasibility of developing the area where the Royal Hudson unloads.

2-17A: Develop restaurants, coffee shops, and artisan and souvenir shops at the Royal Hudson unloading area. While these facilities are not directly related to wildlife viewing, they could focus on an eagle, estuary or nature theme that could reinforce Squamish's outdoor image in the minds of these passing tourists.

Recommendation 2-18: Provide information about wildlife viewing and other tourism/recreation opportunities available in Squamish to Royal Hudson passengers. These passengers may decide to return to Squamish if they are educated about the options available to them.

2-18A: Develop an information kiosk where the Royal Hudson unloads. Maps, brochures for outfitters and other businesses and information about watchable wildlife could be featured and may entice train travellers to revisit the Squamish area in the future.

6.2.5 MARKET RESEARCH

The Eagle Watch Study, conducted in 1999, is the only comprehensive market study about wildlife viewers at the community level. It was conducted during the eagle viewing season. Its findings revealed some key characteristics about eagle viewers. However, these characteristics are not reflective of non-winter wildlife viewers and have generally not been incorporated into product development or enhancement.

Gap: Infrequent market research has led to insufficient knowledge about wildlife viewers' characteristics and their expectations. This is a *gap 1* occurrence.

Recommendation 2-19: Conduct regular market research.

2-19A: The District of Squamish should undertake, or at least provide funding for, some additional visitor market research studies at the community level.

2-19B: Individual operators and tourism-related businesses should be encouraged to conduct their own market research to identify characteristics that are specific to their clientele.

2-19C: Market research should be conducted during the summer in order to understand the needs and expectations of non-winter tourists. The survey that was used for the Eagle Watch Study could be modified in order to apply to tourists who visit throughout the year.

2-19D: Market research should be conducted at least every few years so that trends and changes in demand will be realized.

Recommendation 2-20: Use existing market research data.

2-20A: Market research about wildlife viewers should be gathered from external sources. Results from surveys such as the Canadian Travel Survey and the Domestic Tourism Market Research Study can be used to better understand visitors that could potentially visit Squamish.

Gap: Knowledge about demand has not been incorporated into product development. This represents a *gap 2* occurrence.

Recommendation 2-21: Ensure that market data is used in product development.

2-21A: Provide operators and businesses with contact information for consulting companies who could conduct and analyze visitor surveys for them. Alternately, businesses could be briefly educated on how to conduct and analyze visitor surveys.

2-21B: The Squamish Districts' Tourism Committee should reassess tourism development plans on an ongoing basis in order to take into account the most recent market data analyses.

CHAPTER SEVEN: CONCLUSIONS AND RECOMMENDATIONS

Wildlife viewing is an increasingly important tourism activity. British Columbia is particularly well suited for this endeavour. The purpose of this study was to gain a better understanding of travel market needs and opportunities associated with wildlife viewing development in British Columbia. A literature review, analyses of market demand studies and gap analyses of the case study area were all undertaken in order to achieve this purpose. This chapter first outlines the major conclusions regarding these issues. This is followed by a discussion of specific topics that would benefit from further research.

7.1 MAJOR FINDINGS

7.1.1 KEY CHARACTERISTICS OF DEMAND AND PRODUCT DEVELOPMENT

This study revealed several characteristics of demand that are important from a product development perspective. The most salient socio-demographic characteristics were that viewers were highly educated and were well dispersed in age and income categories. Analyses of psychographic information revealed that wildlife viewers travel whenever they can afford to do so and that they place importance on getting value for their holiday money. They also placed importance on chances to see wildlife, birds and flowers that they do not normally see, opportunities to pursue outdoor activities, visiting national or provincial parks, campgrounds/trailer parks and outstanding scenery. Analyses of behavioural characteristics suggested that wildlife viewers mainly travel in the summer, like to camp, and participate in a variety of outdoor activities. Based on these findings, recommendations for product development were made. Specific suggestions were made for generic, expected, augmented and potential components of tourism products for British Columbian wildlife viewing destinations.

7.1.2 GAP ANALYSIS IN SQUAMISH

This study demonstrated the use of a gap analysis in order to make recommendations for product development. Interviews with key stakeholders in the Squamish District were used to gain an understanding of supply of wildlife viewing resources, to ascertain market demand knowledge, and to identify opportunities for future development. The findings of the interviews were compared against the domestic survey analyses in order to reveal gaps, opportunities and priorities for product development. These were summarized in Table 5.1. General management implications based on the gap analysis were outlined in Chapter Six.

Wildlife viewing has been recognized as a means by which the District of Squamish can diversify its economy. Overall, the District has done relatively little to develop and promote wildlife viewing development. Current products are dispersed throughout the community and seem to lack overall coordination. In many cases, there is a lack of understanding of what wildlife viewers are seeking, and a failure to incorporate viewers' demands into product development.

In order to be better prepared to attract and meet the needs of wildlife viewers, Squamish needs to have more of a community effort in creating an overall tourism plan and in undertaking market research. Priorities, goals and timelines for development should be made so that *ad hoc* tourism development does not occur. A more comprehensive and influential tourism development plan is needed.

The findings from this case study alone are not applicable to other communities. However, the methods by which the gap analysis was conducted could be applied to other destinations. Specifically, this study demonstrated that three types of gaps could be identified and analyzed in order to make product development recommendations. Using locals' knowledge about supply and demand, and comparing findings to market data analyses revealed not only product-market gaps, but also *gap 1* and *gap 2* occurrences. These latter two gaps can reveal *how* market knowledge usage is insufficient at a destination, while the former identifies *what* aspects are missing from wildlife viewing products. However, while methods of the gap analyses presented in this research may be applicable to other destinations, a few issues should first be addressed. These issues are discussed in the next section, which outlines recommendations for future research.

7.2 RECOMMENDATIONS FOR FUTURE RESEARCH

Indirect vs. Direct Wildlife Viewing

This study used the results from the Canadian Travel Survey and the Domestic Tourism Market Research Study in order to identify the characteristics associated with wildlife viewers. Wildlife viewers were segmented from the general surveyed population if they indicated that they participated in bird or wildlife viewing during their last trip. However, this question gives no indication as to whether these tourists participated in direct or indirect wildlife viewing, or whether wildlife viewing was the primary activity or motivational factor for their trip. In the future, domestic surveys could help clarify this by asking respondents to indicate whether they took trips specifically for viewing wildlife.

Frontcountry vs. Backcountry Wildlife Viewers

The frontcountry zone for wildlife viewing is easily accessible and often attracts a large volume of tourists (Ethos Consulting et al., 1991). Backcountry areas, on the other hand, are more difficult to access and often demand viewers to have higher skill levels and be more physically fit than frontcountry viewers. Future questions in the domestic surveys could ask respondents to clarify the zone in which they undertook wildlife viewing. By doing so, researchers would be able to further segment the two types of viewers so that wildlife viewing packages could be customized to their specific needs.

Bird Watchers vs. Other Wildlife Viewers

Bird watching a popular activity that is often pursued by avid naturalists. Other wildlife viewing may attract some avid naturalists, but has great appeal to the rest of the population as well. Due to these differences, the characteristics of bird watchers likely differ from other wildlife viewers. In fact, distinct segments among bird watchers alone have already been established (Scott, 2000; McFarlane, 1996). In order to compare these differences, domestic surveys should ask respondents to identify whether it was bird watching or other wildlife viewing that they pursued.

Other suggestions for further research include:

- Examining the characteristics of international wildlife viewers so that product development and marketing efforts could be better match to attract these travellers;
- Designing a systematic gap analysis method that incorporates **local** market studies into the evaluation step. This study's gap analysis used national surveys. While findings presented an overall picture of wildlife viewers, they did not necessarily pinpoint the specific characteristics of viewers to a particular destination; and,
- Conducting a "best practices" study to reveal how sustainable wildlife viewing development might be achieved. This may be especially useful to Squamish since wildlife viewing is still relatively undeveloped.

APPENDIX A: DOMESTIC TOURISM MARKET RESEARCH STUDY TABLES

Socio-Demographic Characteristics

Response	Wildlife Viewers	Non-Viewers	$\chi 2$	Sig.
Gender - Female	48.5%	51.5%	6.892	0.009
Marital Status				
Married or living with someone	63.0%	56.9%	30.225	0.000
Single	24.2%	30.0%	32.440	0.000
Separated or divorced	8.5%	6.9%	7.867	0.005
Widow/widower	3.3%	5.8%	25.106	0.000
Education				
Graduated from high school	25.3%	27.0%	2.894	0.089
Bachelor's degree	18.8%	15.2%	18.232	0.000
Some college, CEGEP or university	15.3%	16.4%	1.899	0.168
Some high school	12.5%	19.1%	58.121	0.000
Graduated from college or CEGEP	11.7%	9.3%	12.491	0.000
Masters or Doctorate	7.8%	4.7%	36.374	0.000
Graduated from a technical or vocational school	5.6%	5.5%	0.046	0.831
Primary school (grades 1-7)	3.0%	1.9%	11.224	0.001
Occupation				
Professional	21.7%	16.0%	45.465	0.000
Retired	16.7%	16.8%	0.018	0.893
Laborer (blue collar)	10.5%	9.8%	0.992	0.319
Clerk/sales (white collar)	10.1%	11.6%	4.325	0.038
Student	8.2%	11.9%	27.672	0.000
At home	7.3%	9.0%	6.836	0.009
Technician	5.3%	4.4%	3.119	0.077
Director/manager	4.8%	5.0%	0.082	0.775
Self-employed/business owner	3.8%	3.7%	0.114	0.736
Teacher	3.0%	1.5%	28.932	0.000

Socio-Demographic Characteristics (Continued)

Response	Wildlife Viewers	Non-Viewers	$\chi 2$	Sig.
Occupation (Continued)				
Service industry	2.6%	1.1%	34.929	0.000
Unemployed	2.6%	3.0%	1.011	0.315
Other	2.5%	3.2%	3.077	0.079
Healthcare	0.9%	1.7%	9.098	0.003
Annual Household Income				
Less than $20,000	3.5%	8.9%	77.006	0.000
$20,001 to $30,000	18.2%	14.4%	21.631	0.000
$30,001 to $40,000	12.3%	13.6%	2.700	0.100
$40,001 to $50,000	14.8%	11.1%	27.348	0.000
$50,001 to $60,000	9.8%	10.7%	1.635	0.201
$60,001 to $70,000	9.9%	8.8%	2.627	0.105
$70,001 to $80,000	4.5%	5.6%	4.864	0.027
$80,001 to $90,000	2.8%	3.5%	2.431	0.119
$90,001 to $100,000	4.1%	2.3%	25.654	0.000
$100,000 or greater	4.0%	3.8%	0.163	0.687
Age				
15-19	5.4%	9.2%	36.080	0.000
20-24	8.9%	9.3%	0.447	0.504
25-29	11.8%	10.7%	2.673	0.102
30-34	10.7%	11.7%	1.830	0.176
35-39	15.0%	9.8%	54.557	0.000
40-49	23.6%	16.2%	75.650	0.000
50-59	8.3%	12.4%	31.817	0.000
60-64	5.1%	5.6%	0.994	0.319
65 and over	10.3%	14.6%	29.841	0.000
Number of minors in household	0.90	0.80	3.88138	0.00010
Number of adults in household	2.01	2.13	-6.42977	0.00000
Contributors to household income	1.72	1.72	-0.16948	0.86542

Source: Derived from the 1995 Domestic Tourism Market Research Study

Activity Participation During Most Recent Trip

Activity	Wildlife Viewers	Non-Viewers	$\chi 2$	Sig.
Taking pictures or filming	58.9%	49.5%	31.533	0.000
Visiting scenic landmarks	54.5%	31.0%	217.999	0.000
Informal or casual dining with table service	54.1%	59.4%	10.171	0.001
Dining in fast food restaurants or cafeterias	52.9%	51.7%	0.540	0.462
Visits to appreciate natural ecological sites like forests, wetlands, or animal reserves	52.2%	17.7%	605.777	0.000
Sunbathing or other beach activities	50.6%	28.3%	205.692	0.000
Visiting small towns and villages	47.6%	30.0%	125.632	0.000
Driving to scenic places	45.7%	33.1%	62.061	0.000
Getting to know local people	42.0%	34.1%	24.598	0.000
Visiting mountainous areas	41.4%	16.4%	346.092	0.000
Outdoors activities such as climbing, etc.	39.5%	15.4%	339.760	0.000
Sampling local foods	37.6%	24.3%	80.898	0.000
Local crafts and handiwork	31.3%	19.7%	71.365	0.000
Taking a nature and/or science learning trip	29.4%	11.2%	248.916	0.000
Enjoying ethnic culture/events (e.g. festivals, music, neighborhoods, food)	28.8%	23.0%	16.537	0.000
Water sports (e.g. water skiing, sailing, canoeing)	25.6%	10.8%	173.391	0.000
Staying in campgrounds or trailer parks	24.8%	7.5%	299.559	0.000
Visiting remote coastal attractions like fishing villages or lighthouses	21.0%	9.4%	120.865	0.000
Short guided excursion/tour	18.9%	12.7%	29.169	0.000
Visiting places of archaeological interest	16.8%	6.7%	121.166	0.000
Seeing big modern cities	15.7%	19.0%	6.679	0.010
Stay at a resort area	15.4%	13.6%	2.424	0.120
Visiting places with religious significance (e.g. churches, temples)	11.2%	15.2%	11.331	0.001
Visiting sites commemorating important people	11.0%	9.9%	1.199	0.274
Taking a cruise for a day or less	10.5%	4.8%	54.121	0.000
See or experience unique or different native groups (such as Inuits and Indians)	9.8%	5.2%	33.565	0.000
Diving (snorkeling or scuba)	8.9%	2.4%	116.311	0.000
Visiting casinos	7.9%	7.3%	0.492	0.483

Activity Participation During Most Recent Trip (Continued)

Activity (Continued)	Wildlife Viewers	Non-Viewers	$\chi 2$	Sig.
Playing tennis	7.4%	3.6%	32.949	0.000
Other winter sports	7.3%	8.4%	1.638	0.201
Other gambling	7.0%	4.5%	12.255	0.000
Horse-riding	5.4%	4.4%	2.287	0.130
Visiting places where you can experience life on a ranch	4.1%	3.9%	0.082	0.775
White water rafting	3.7%	1.0%	49.806	0.000
Taking a cruise of one or more nights	3.4%	1.2%	30.331	0.000
Visiting places of military significance	2.9%	6.7%	21.910	0.000
Visiting health spas	2.5%	2.3%	0.195	0.659
Snowmobiling	2.4%	2.9%	0.763	0.382
Surfing	0.9%	1.1%	0.386	0.534
Other	4.7%	9.2%	22.424	0.000

Source: Derived from the 1995 Domestic Tourism Market Research Study

Trip Motivations

Motivation	Mean Response		t	Sig.
	Wildlife Viewers	Non-Viewers		
Standards of hygiene and cleanliness	3.59	3.52	1.73686	0.08251
Nice weather	3.48	3.48	-0.04396	0.96494
Having fun, being entertained	3.45	3.27	3.72756	0.00020
Destination that provides value for my holiday money	3.32	3.29	0.66705	0.50479
Interesting and friendly local people	3.27	3.15	2.60375	0.00927
Environmental quality of air, water and soil	3.25	3.15	1.89951	0.05759
Personal safety, even when traveling alone	3.23	3.41	-3.89843	0.00010
Opportunity to increase one's knowledge	3.20	3.02	3.75650	0.00018
Variety of things to see and do	3.17	3.32	-3.12464	0.00180
Outstanding scenery	3.16	3.07	1.83114	0.06718
Inexpensive restaurants	3.00	2.76	4.78415	0.00000
Chances to see wildlife, birds and flowers that you don’t normally see	2.78	2.46	5.72588	0.00000
Local cuisine	2.76	2.76	0.02796	0.97769
Lakes and rivers	2.70	2.52	3.18946	0.00144
Availability of comprehensive pre-trip and tourist information	2.69	2.72	-0.52691	0.59830
Easy access to good health care facilities	2.67	2.98	-5.70476	0.00000
Budget accommodation	2.55	2.62	-1.27266	0.20323
Shopping	2.52	2.73	-3.96054	0.00008
National parks and forests	2.52	2.34	3.26260	0.00112
Beaches for sunbathing and swimming	2.52	2.58	-0.97517	0.32955
First class hotels and resorts	2.45	2.38	1.25128	0.21093
Arts and cultural attractions (e.g. live theatre, concerts, dance, opera, festivals)	2.43	2.44	-0.27543	0.78300
High quality restaurants	2.42	2.48	-1.01785	0.30883
Historical places or buildings	2.35	2.48	-2.21652	0.02673
Nightlife and entertainment (bars, clubs, dancing)	2.35	2.44	-1.51218	0.13059
Outdoor activities such as hiking, climbing	2.34	2.11	4.00283	0.00006
Activities for the entire family	2.33	2.38	-0.78631	0.43175
Taking advantage of the currency exchange rate	2.30	2.64	-5.37625	0.00000

Trip Motivations (Continued)

Motivation (Continued)	Mean Response Wildlife Viewers	Non-Viewers	t	Sig.
Big modern cities	2.28	2.40	-2.33235	0.01975
Availability of package trips and all inclusive holidays	2.23	2.30	-1.20715	0.22747
Variety of short guided excursions/tours	2.22	2.38	-2.89151	0.00386
Museums and art galleries	2.21	2.28	-1.40276	0.16079
Opportunity to see or experience native cultures	2.08	2.17	-1.76319	0.07797
Water sports (such as swimming or sailing)	2.06	2.11	-0.82427	0.40985
Theme parks and amusement parks	1.94	2.00	-1.16762	0.24305
Visiting remote coastal attractions like fishing villages or lighthouses	1.93	1.99	-1.05060	0.29353
Cottage/country home	1.82	1.77	0.98302	0.32567
Spectator sporting events	1.79	1.84	-0.92178	0.35672
Alpine skiing (downhill)	1.70	1.42	6.48530	0.00000
Campgrounds and trailer parks	1.68	1.55	2.66461	0.00775
Casinos or other gambling	1.66	1.79	-2.39967	0.01647
Hunting or fishing	1.51	1.49	0.53440	0.59311
Golf	1.46	1.55	-1.86699	0.06200
Cruises of one or more nights	1.45	1.77	-6.43547	0.00000
Tennis	1.25	1.44	-4.82872	0.00000

* Based on a scale where 1 = not important at all, 2 = not very important, 3 = somewhat important and 4 = very important.

Source: Derived from the 1995 Domestic Tourism Market Research Study

General Travel Motivations

Motivation	Mean Response * Wildlife Viewers	Non-Viewers	t	Sig.
Standards of hygiene and cleanliness	3.63	3.62	0.79863	0.42452
Destination that provides value for my holiday money	3.54	3.44	5.36723	0.00000
Personal safety, even when traveling alone	3.48	3.51	-1.42776	0.15338
Variety of things to see and do	3.41	3.28	7.58874	0.00000
Nice weather	3.40	3.48	-4.41553	0.00001
Outstanding scenery	3.36	3.14	11.35244	0.00000
Opportunity to increase one's knowledge	3.33	3.16	8.93867	0.00000
Interesting and friendly local people	3.32	3.22	5.13480	0.00000
Having fun, being entertained	3.32	3.30	1.22900	0.21909
Environmental quality of air, water and soil	3.29	3.21	3.43623	0.00059
Chances to see wildlife, birds and flowers that you don’t normally see	3.10	2.82	12.87012	0.00000
Availability of comprehensive pre-trip and tourist information	3.02	2.75	11.01925	0.00000
Easy access to good health care facilities	3.02	3.03	-0.48097	0.63055
Activities for the entire family	2.90	2.75	5.77505	0.00000
National or provincial parks	2.89	2.64	11.68782	0.00000
Taking advantage of the currency exchange rate	2.89	2.84	1.98297	0.04739
Beaches for sunbathing and swimming	2.86	2.69	7.59708	0.00000
Historical places or buildings	2.81	2.69	5.26622	0.00000
Budget accommodation	2.77	2.78	-0.10368	0.91742
Local cuisine	2.72	2.64	3.75343	0.00018
Inexpensive restaurants	2.72	2.70	1.09602	0.27309
Outdoor activities such as hiking, climbing	2.71	2.37	13.82429	0.00000
Shopping	2.59	2.74	-6.52491	0.00000
Arts and cultural attractions (e.g. live theatre, concerts, dance, opera, festivals)	2.50	2.51	-0.43581	0.66298
Water sports (such as swimming or sailing)	2.43	2.18	10.69499	0.00000

* Based on a scale where 1 = never important, 2 = sometimes important, 3 = often important and 4 = always important.

General Travel Motivations (Continued)

Motivation (Continued)	Mean Response * Wildlife Viewers	Non-Viewers	t	Sig.
Nightlife and entertainment (bars, clubs, dancing)	2.37	2.39	-1.08595	0.27752
High quality restaurants	2.35	2.11	10.13014	0.00000
Theme parks and amusement parks	2.30	2.22	3.76172	0.00017
Opportunity to see or experience aboriginal cultures	2.29	2.24	2.33670	0.01947
Visiting remote coastal attractions like fishing villages or lighthouses	2.27	2.11	7.39574	0.00000
Museums and art galleries	2.26	2.21	2.19550	0.02814
Variety of short guided excursions/tours	2.26	2.25	0.83739	0.40239
Availability of package trips and all inclusive holidays	2.22	2.21	0.41358	0.67919
Big modern cities	2.17	2.35	-8.69347	0.00000
Campgrounds and trailer parks	2.12	1.85	11.35311	0.00000
First class hotels and resorts	2.10	2.14	-1.80384	0.07128
Spectator sporting events	2.05	2.09	-1.95965	0.05005
Hunting or fishing	1.93	1.73	8.79135	0.00000
Cruises of one or more nights	1.76	1.82	-2.79431	0.00521
Alpine skiing (downhill)	1.68	1.57	5.37662	0.00000
Golf	1.66	1.59	3.62672	0.00029
Casinos or other gambling	1.62	1.66	-2.40836	0.01604

* Based on a scale where 1 = never important, 2 = sometimes important, 3 = often important and 4 = always important.

Source: Derived from the 1995 Domestic Tourism Market Research Study

Travel Philosophy

Travel Philosophy	Mean Response * Wildlife Viewers	Non-Viewers	t	Sig.
There is a lot to see and do in Canada	3.81	3.77	3.91817	0.00009
Getting value for my holiday money is very important to me	3.66	3.70	-2.88388	0.00393
I travel for leisure, recreation or holiday whenever I can afford to	3.63	3.53	6.16922	0.00000
For me, money spent on travel is very well spent	3.55	3.52	2.09246	0.03641
I enjoy making my own arrangements for my holidays	3.53	3.44	5.49269	0.00000
I often take holidays during the summer	3.45	3.31	6.51933	0.00000
I generally take frequent short trips of a few days each year	3.40	3.17	10.16045	0.00000
I generally take one or two trips of a week or more each year	3.21	2.95	10.57512	0.00000
I take lots of short trips to a lake or cottage	3.00	2.41	21.71627	0.00000
I prefer taking a holiday in Canada instead of going to the U.S.	3.00	2.91	3.48291	0.00050
I would consider traveling more in Canada in the spring or fall if special packages or value added offers were available	2.93	2.90	1.27783	0.20133
I often take winter holidays	2.57	2.46	4.50598	0.00001
It is important that the people I encounter on a holiday trip speak my language	2.47	2.86	-15.47796	0.00000
Once I get to my destination, I like to stay put	2.28	2.36	-3.19825	0.00139
It’s easier to find good hotel rooms in the U.S. during the summer	2.21	2.35	-4.67873	0.00000
I prefer traveling overseas	2.20	2.23	-1.28519	0.19874
I like to travel on all-inclusive package holidays	2.15	2.26	-4.07970	0.00005

* Based on a scale where 1 = strongly disagree, 2 = somewhat disagree, 3 = somewhat agree and 4 = strongly agree.

Travel Philosophy (Continued)

Travel Philosophy	Mean Response *			
	Wildlife Viewers	Non-Viewers	t	Sig.
I prefer to go on escorted tours when taking a longer trip	2.06	2.03	1.23630	0.21637
I generally like to go to the same place every year for my holiday	1.97	2.07	-4.33225	0.00001
For most pleasure trips of one night or more, I tend to think of going to the U.S. first	1.69	1.91	-9.22834	0.00000
Long distance travel of more than 1000km (620 miles) is more of a hassle than a holiday	1.66	1.78	-5.38255	0.00000
I do not really like to travel	1.27	1.31	-2.33915	0.01934

* Based on a scale where 1 = strongly disagree, 2 = somewhat disagree, 3 = somewhat agree and 4 = strongly agree.

Origin:

Province	Wildlife Viewers	Non-Viewers
Alberta	11.1	9.9
British Columbia	10.6	12.5
Manitoba	3.2	4.4
New Brunswick	2.0	2.6
Newfoundland	1.2	2.2
Northwest Territories	0.4	0.1
Nova Scotia	2.2	3.5
Prince Edward Island	0.1	0.4
Ontario	31.2	39.6
Quebec	34.1	20.9
Saskatchewan	3.4	3.8
Yukon	0.5	0.2

$\chi 2$ = 259.00269. **Sig. =** 0.00000.

Main reason for taking trip:

Trip Purpose	**Bird Wildlife**	**Other**
Weekend getaway	9.2	7.8
To combine business and pleasure	4.5	5.4
For pleasure or a vacation	51.0	32.6
A honeymoon	0.7	0.3
A company vacation	0.0	0.4
To study	1.7	0.7
Shopping	0.5	1.4
To visit friends or relatives	22.6	40.7
Other	2.7	1.8
Sporting event/concert/tournament	0.7	3.6
Wedding/funeral/graduation	0.1	2.3
Ski/fishing	6.0	2.1
Other	0.3	0.9

χ**2** = 643.44851. **Sig.** = 0.00000.

Month trip started:

Month	**Wildlife Viewers**	**Non-Viewers**
January	7.4	7.3
February	6.6	7.0
March	8.5	5.8
April	5.6	6.1
May	5.9	7.4
June	13.0	8.0
July	26.5	18.1
August	10.9	10.5
September	1.4	4.8
October	9.9	10.4
November	1.6	4.6
December	2.8	10.0

χ**2** = 371.74117. **Sig.** = 0.00000.

Nights away from home:

	Wildlife Viewers	Non-Viewers	t	Sig.
Average Number Of Nights	10.86	7.98	11.13557	0.00000

Destination Decision Maker:

Destination Decision Maker	**Wildlife Viewers**	**Non-Viewers**
Yourself	61.1	56.7
Wife/girlfriend	19.0	18.4
Husband/boyfriend	23.7	16.4
Other	3.6	5.4
Couple	3.3	6.2
Mother	10.9	16.1
Father	9.3	7.2
Family	2.0	1.9
Other relatives	3.0	3.6

Travel Party Sizes:

	Wildlife Viewers	Non-Viewers	t	Sig.
Average travel party size when trip started	2.99	2.97	0.46853	0.63941214
Average #. of minors in travel party when trip started	0.87	0.90	-0.77706	0.43713327

Package Usage:

Package Usage	Wildlife Viewers	Non-Viewers
Yes	16.7	13.3
No	83.3	86.7

$\chi 2$ = 5.88835. **Sig. =** 0.01524.

Accommodation in which spent at least one night during trip:

Type Of Accommodation	Wildlife Viewers	Non-Viewers
Home of friends or relatives	27.3	53.6
Mid price hotel (e.g. Holiday Inn/Ramada)	23.3	24.9
Campground or caravan park	29.0	6.9
Budget hotel (Best Western)	11.5	9.0
Other	15.8	5.2
Luxury hotel (e.g. Hilton or Sheraton)	10.5	8.7
Bed & breakfast (includes tourist homes)	5.7	2.3
Resort (that provides all facilities and activities)	6.8	3.1
Private cottage or cabin	1.5	2.2
Motel	1.3	1.3
Lodge (hunting, fishing lodge)	3.4	0.5
University accommodation	0.0	0.8
Cruise Ship	4.9	0.5
Backpackers/youth hostel	0.9	0.8
Timeshare unit	1.6	1.1
Rustic resort	0.3	0.4
None	0.0	0.6
Ski resort	0.0	0.4

APPENDIX B: CASE STUDY INTERVIEW QUESTIONNAIRE

General

1. In December of 1994, the *Tourism Development Plan* for Squamish outlined the desire to "encourage wildlife viewing and interpretive activities". From your observations, what initiatives have been taken since 1994 to develop wildlife viewing opportunities?
2. What makes Squamish a unique wildlife viewing destination?
3. What could wildlife viewers see in the area that might be of interest and what are the different types of wildlife viewing attractions they could visit?
4. What are the main factors that motivate wildlife viewers to visit Squamish/your organization (e.g. natural environment, location, safety, variety of things to see and do, etc.)? Does Squamish/your organization attempt to incorporate these factors into the design of wildlife viewing products?
5. What type of image does Squamish/your organization wish to instil in the minds of tourists in general and in wildlife viewers about the area as a tourism destination? Does Squamish/your organization attempt to brand itself in any way?
6. Does Squamish/your organization conduct any market research related to wildlife viewing? If so, how is this done? What are the major findings of this research (e.g. what do wildlife viewers like or dislike about Squamish/your organization, and what do they feel is missing)? Are these findings incorporated into the development of wildlife viewing products? If so, how?
7. What are the main *expectations* of wildlife viewers (what demands of wildlife viewers need to be met in order for them to view wildlife in Squamish? e.g. do they require just the presence of wildlife, or do they also need guides with first aid training or educational training, interpretive signs, etc.)? Does Squamish adequately meet these expectations? How does Squamish attempt to exceed wildlife viewers' expectations?
8. Does Squamish/your organization cater to any specific socio-demographic groups of tourists? If so, how?
9. In general, what factors hinder tourism and wildlife viewing development in the Squamish region?

Natural Resource

10. Other than Eagles, do any other wildlife species attract tourists to the area? Are these species unique in any way to Squamish? Are there any other species that have the potential to attract tourists in the future?
11. What other natural resources (i.e. lakes, mountains, etc.) could attract wildlife viewers to Squamish?
12. What are the main environmental concerns associated with wildlife viewing/wildlife viewing development in the Squamish area?

Cultural

13. Are there any cultural activities associated with wildlife viewing in Squamish? If so, what are they and are they unique to the area?
14. Is there any cultural or social sensitivity related to wildlife viewing?

Events

15. Does the Eagle festival attract non-local participants? If so, what proportion of these visitors stay longer than a few hours? What proportion of these visitors stay overnight?
16. Does the Eagle festival complement or compete with other local events? If so, which events?
17. Does Squamish host any wildlife-related events in addition to the Eagle Festival? If so, what makes the event unique? What is the frequency of occurrence?

Activities

18. What different activities could wildlife viewers participate in during their visit to Squamish? How unique are these activities to Squamish?
19. Which of these activities are likely most appealing to wildlife viewers?

Services and Facilities

20. What types of food services would wildlife viewers prefer? Does Squamish have an adequate supply of these food services?
21. What types of accommodation would wildlife viewers prefer to stay in? Does Squamish supply adequate accommodation of this type?
22. Does Squamish lack any facilities that wildlife viewers would need or desire?

Do you have any additional comments regarding wildlife viewing in Squamish?

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