ALLEGRA

klue

Benchmark Report
Developing Finnish Lapland as a year-round travel destination through outdoor activities

1. Management Summary

While this benchmark study was initially focused on summer outdoor tourism, we shifted our focus a bit more towards MTB tourism, as this lays in the interested of the majority of interviewed experts.

To achieve good results for this report we assessed the current status of summer outdoor tourism in Finnish Lapland and compared it with the world's most successful destinations in this field.

A huge advantage is Lapland's vast and untouched wilderness and nature. Something mid-European guests are looking for. While nature in the Alps and Western Europe is beautiful, it's never as untouched or wide open. The density of population is big and there's almost not a point in nature where you can't see any signs of human impacts.

For each benchmark we explained how it is comparable to Finnish Lapland and in which matters they are not. For example, while Scotland is relatively remote as well, they don't have existing tourism infrastructure or even winter tourism. On the other hand, Sölden, is comparable in the lack of summer tourism and the existing tourism destination, it's not as remote.

All those successful benchmark destinations have one of the following two things in common. They grew successful as a summer destination because of a very strong local summer outdoor sport culture. For example, Rotorua, NZ had a very active MTB club. After starting in 2005 they've worked their way up as a destination over the past fifteen years with the help of a lot of passionate volunteers.
On the other hand, some choose a systematic approach for the development of their summer tourism. Like Graubünden and Sölden that created in their own success within three years through a top-down development project.
Destinations that don't have one of the two, have failed in creating a sustainable success as a summer destination.

2. Project Initiation

This report and all its reviews and recommendations relate to summer outdoor tourism. We define the snowless season extending from June until October as "summer".

a. Why this project is needed

The benchmark study about "developing Finnish Lapland as a year-round travel destination through outdoor activities" was launched in Summer 2020 in the midst of the global COVID-19 pandemic which has dramatically changed the market for travel and tourism. It seeks to build a basis for Finnish Lapland to effectively transform itself into a year-round tourism destination and grow its appeal as a summer destination for outdoor enthusiasts.

There is no question that Finnish Lapland already offers beautiful nature and untouched wilderness along with exotic cultural experiences and good infrastructure for outdoor activities. However, this project was needed to ensure that Finnish Lapland will stand out from the pack and realize its full potential as a summer destination against increasingly professional international competition.

b. Approach

Our approach focuses on long-term sustainable development of destinations. We ensure this by including all stakeholders within a community from the initial stages of the development process. To identify the ambitions, values and concerns of the local community regarding outdoor tourism development, the project team carried out two webinars, two workshops and nine expert interviews. We identified half a dozen benchmarking international destinations and compared them with Finnish Lapland based on key characteristics.

The selection of the benchmarking destinations was based on the following principles:

- Quality of tourism infrastructure, services and identity
- Remoteness and accessibility
- Diversity of destinations in region
- Lack of summer tourism or economic challenges / successful transformation

c. Goals of the Project

The goals of this project were twofold: First, to gain an enhanced understanding of the current state, potential and future vision for summer outdoor tourism in Finnish Lapland by means of a series of interactions with key stakeholders. Second, to identify the main differentiators and outline the critical next steps based on an international benchmarking against six destinations with similar characteristics in terms of geographical location, existing tourism infrastructure and opportunities for outdoor activity tourism.

This project provides both guidance and a framework for the future development of outdoor summer tourism under the leadership of Visit Finland in close cooperation with the key actors in Finnish Lapland. It presents a practical toolkit and a set of concrete next steps that will help increase international awareness of Finnish Lapland as a summer destination for outdoor activity enthusiasts.

3. Analysis

a. Webinars, Workshops and Expert Interviews

The process kicked off in early November 2020 by means of two identical webinars entitled "Developing successful outdoor destinations". The purpose of these sessions was to introduce the project, provide an overview of the outdoor tourism market, describe the project methodology and collect initial views on main topics. More than 50 participants from around Finnish Lapland attended these webinars.

To gather more detailed feedback on the key themes under investigation, two virtual workshops were conducted in the latter half of November 2020. A total of 22 participants joined the workshops, including representatives of all main destinations, key tourism businesses and other key stakeholders in Lapland. Refer to Appendix 1 for a summary of workshop materials. The virtual workshops focused on outdoor tourism in general. However, the role of cycling and specifically mountain biking became progressively more central as the dialogue shifted to operational issues in the expert interviews.

Due to the ongoing Covid-19 pandemic, the project had to rely on remote working technologies for its execution. To gather feedback on the key themes under investigation, two identical virtual workshops were conducted in November 2020. They followed an introductory webinar during which Allegra-Klue provided an overview of the project methodology, outlined assignment goals and collected initial views on main topics. A total of 22 participants joined the workshops, including representatives of all main destinations, key tourism businesses and other key stakeholders in Lapland. Refer to Appendix 1 for a summary of workshop materials.

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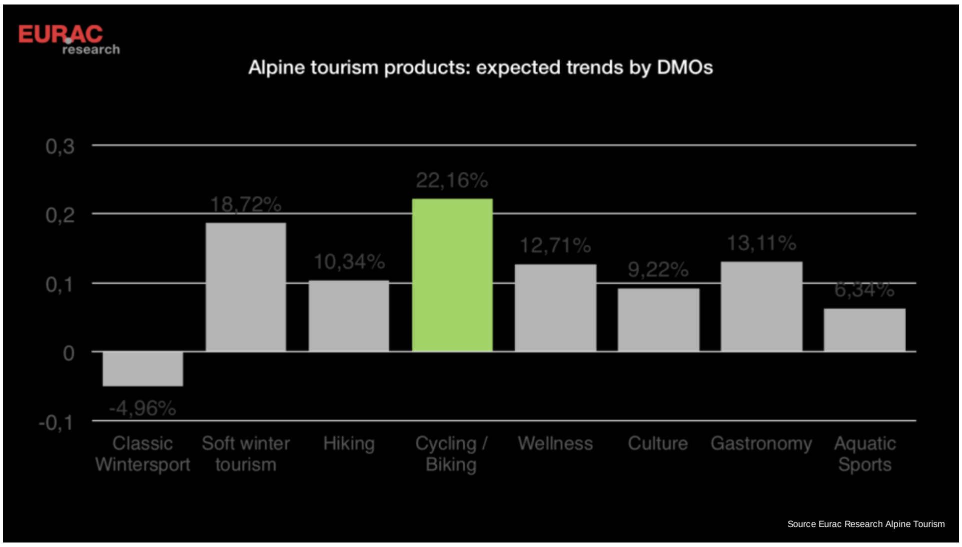
Workshop findings

When asked to identify the strengths of Finnish Lapland during the summer, the workshop participants emphasized its unique Arctic nature and Lappish culture. They also considered the positive approach to development to be an advantage, in addition to the current momentum around cycling and mountain biking. The existing infrastructure (e.g., for accommodation, services) was also seen to provide a solid foundation for future outdoor tourism development efforts.

Concerning the main challenges, the participants stressed the lack of resources and low public sector investment. Issues related to landowners and the low level of productization and lack of focus on customer experience and service design were also seen as weaknesses. Moreover, the participants identified a need to provide more outdoor-specific training and education to local tourism personnel. From an operational perspective, signage, route planning, equipment rental and service quality were mentioned as areas where there would be room for improvement.
The workshops also offered concrete solutions for some areas of development. Key for future success was considered to be open and coordinated cooperation among local actors and specific development projects at the 'whole of Lapland' level. Such an approach would ensure progress in the right direction, which would need to entail the selection of customer target groups, product and service design, and marketing.

The workshops were also used to gain insight into the topic of cycling/mountain biking, including the identification of target groups and segments. This discussion was structured around a matrix composed of cycling target groups (families, trail riders, explorers, downhill riders, etc.) and their typical length of stay (i.e., locals, day guests, weekend visitors, week holiday-goers, long-haul).


EURAC research
Alpine tourism products: expected trends by DMOs
0,3
0,2
0,1
0
-0,1
-4,96%
18,72%
10,34%
22,16%
12,71%
9,22%
13,11%
6,34%
Classic Wintersport
Soft winter tourism
Hiking
Cycling / Biking
Wellness
Culture
Gastronomy
Aquatic Sports
Source Eurac Research Alpine Tourism

The workshops concluded that the destinations are currently focused on offering trail-based activities, specifically for mountain biking, that are targeted at families, with the typical and preferred duration of stay being a week. Notably, however, the "explorers" target group was seen to possess future potential, albeit on a smaller scale.

The workshop participants stressed that further development work is extremely important and relevant in the current situation.

Expert Interview Findings

Following the virtual workshops, the project continued with expert interviews that were designed to collect in-depth information and views from carefully selected industry representatives.

A total of 9 interviews were conducted with experts who represented a broad range of Finnish Lapland destinations, hotel and restaurant enterprises, the public sector, outdoor tourism service providers and tourism specialists. The structure of the interviews, at 60-90 minutes of length, was designed to be consistent and evaluate the current state of outdoor tourism, its strengths and weaknesses, the future vision as well as to identify the actors and phenomena that most contribute to progress. Refer to Appendix 2 for a summary of the expert interviews.

A number of common themes surfaced through the expert interviews. Perhaps the most important is the fact that although the mandate of this benchmarking study was to explore outdoor activities during the summer season, the interviews without exception ended up discussing the future importance of cycling, specifically mountain biking. Mountain biking was seen as the main product driver that will be supporting the development of all other summer outdoor activities.

By the same token, the interviewed experts found it important that any future development work in this space is built on a shared master plan. Such a plan should consider both future infrastructure requirements and the related development of service design and the customer experience journey. In addition, the master plan should include the definition of target customer groups, which is seen as particularly crucial and might present a risk if not correctly done. The interviewees also noted both the concern and expectation that the Finnish public sector will need to provide strong background support for the project to succeed. Finally, they noted that outdoor tourism and especially mountain biking will require specific expertise and involvement of experienced professionals to ensure that the master plan is successfully executed.

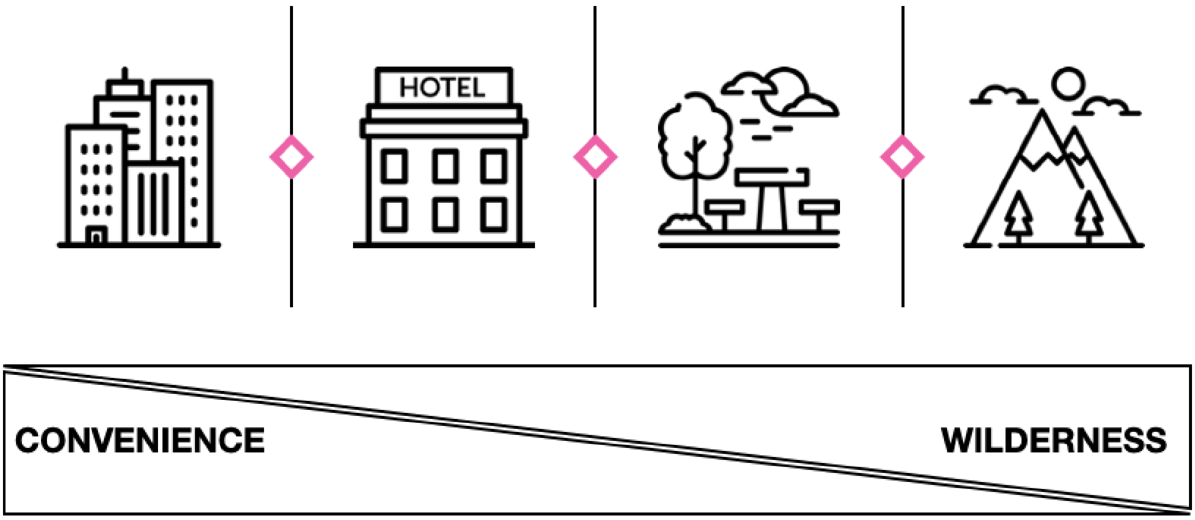
In terms of the vision for the future state of summer tourism in Finnish Lapland, the experts strongly agreed that there is great potential for outdoor tourism and that the summer season in 2030 will equal that of the current winter season. Indeed they expected Finnish Lapland to be an internationally known outdoor destination and comparable to Scotland when it comes to mountain biking by 2030. However, they also stressed the importance of sustainable development as the foundation for the new future direction. This will need to be reflected in route development, customer target group selection, investment decisions and service design, just to mention a few key areas. The threats or risks to the project's success will involve questions related to service quality, resourcing, inter-destination/inter-regional cooperation, and choices when it comes to key strategic focus areas.

Referring to the expectations for the present study, the experts highlighted the importance of its timing and the need for a common roadmap or a master plan for future development. Such a plan would help provide the high-level structure and ensure the integration of the needs of the different stakeholders. At the same time, the benchmark study is expected to provide insight into the current state of outdoor tourism (with focus on mountain biking) in Finnish Lapland compared with international destinations as well as to identify relevant best practices for operational implementation.

b. Market - Micro Perspective

Many outdoor activity enthusiasts expect to experience untamed nature that is readily available. On one side, they wish to go on authentic adventures in untouched nature and on the other side, these experiences are supposed to be within easy access and full of convenience. However, this seemingly unrealistic gap in expectations does not necessarily have to be an illusion if the customer journey is designed to bridge the gap through progressive offers. In other words, there has to be a smooth transition between different offerings that include decreasing levels of convenience and increasing amounts of wilderness.

It is the outdoor destination's task to bridge this gap between convenience and wilderness with a set of offerings and carefully tailored guiding of guests - from their everyday habitat (where convenience is very high) to the farthest frontiers of wilderness.



In the very near future, travellers will no longer feel comfortable in a role as tourists. The longing for bonding and community is growing. This need can be satisfied through the experience of natural elements or authentic encounters with the local population. A vacation is likely to become a space for personal development. Finnish Lapland has the potential to offer such open spaces in which travellers (not just as guests) can resonate with nature and bond with the local population.

The various facets of outdoor activities have the potential to satisfy the need for authentic encounters along multiple dimensions. This is why outdoor activities have to be understood as a vehicle of access to nature and the related experiences. Services such as accommodation or transportation are expected to be of the highest standard and act as gates from one convenience/wilderness stage to the next.

c. Market – Macro Perspective

According to recent research, outdoor activities are booming worldwide. There are many indicators that support the thesis that outdoor activities will further grow in popularity. This is showcased by the following figures:

- Globally, adventure tourism now valued at $445 billion is expected to grow to $1'335 billion by 2023 .[1]
- Hiking and cycling are expected to make up for 32.5 % among tourism products in rural destinations in the future.[2]
- Outdoor activities are popular in most European countries where the number of outdoor enthusiasts correlates with the population of the country. The largest markets are Germany, UK, France, Italy and Poland.

The e-bike sector has grown rapidly in recent past. Despite the high number of sold electric bicycles so far, manufacturers estimate that market saturation will exceed 50% in 2021. This means that the number of electric bikes in circulation is expected to double in the next 15 to 20 years.

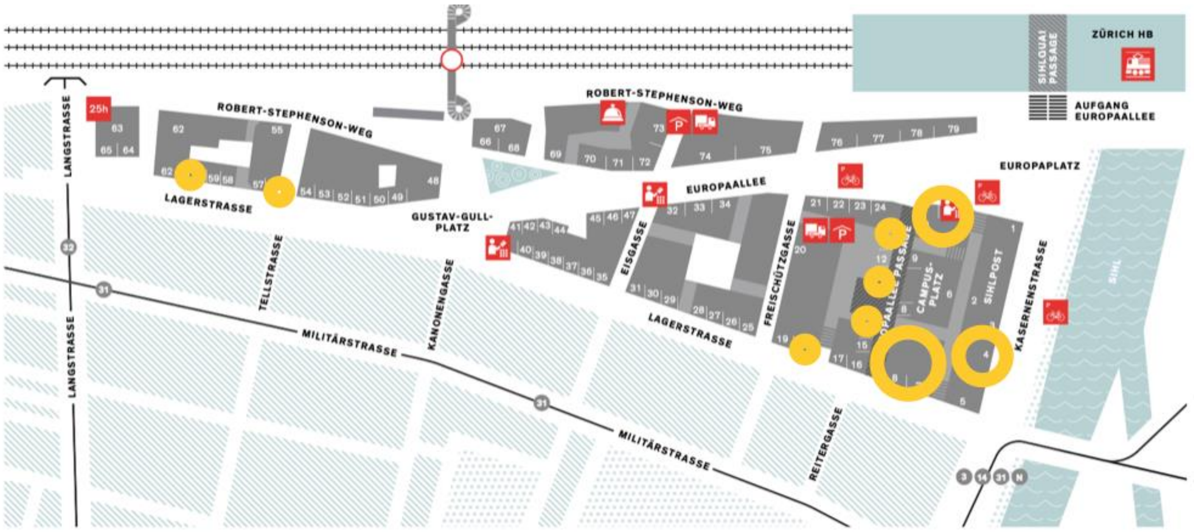
An interesting footnote during the Covid-19 pandemic is that Finland has been the EU country that has invested the most Euros (€7.76) per person in cycling infrastructure.

The outdoor equipment industry is strongly tied to outdoor tourism. While there are many indicators to underline its positive outlook, there are qualitative indicators that illustrate the rise of outdoor activities, such as the following example.

1 https://www.prnewswire.com/news-releases/global-adventure-tourism-market-expected-to-reach-1335738-million-by-2023-allied-market-research-672335923.html

2 2015_theALPS-Bike-Study-2015

The city of Zurich in Switzerland is not a large city but one with the highest cost of living in the world. The main train station represents the very center of the city. And it is in this area that an ambitious construction project has transformed old postal and train buildings into a vibrant area with residential and working infrastructure, schools, restaurants, cultural offers and shops. Within all spaces occupied by shops, the outdoor activities sector occupies a significant amount of all shopping surfaces (yellow circles).



This dominant position used to be reserved for luxury and fashion brands. The prominent presence of outdoor offerings in the most prestigious city districts is a clear indicator for the rise of interest in outdoor activities within everyday culture across the world.

d. Destination - Macro Perspective

The Lapland region is the northernmost, largest and most sparsely populated region in Finland. It enjoys eight different seasons with significant variations; the winters are exotically dim and the summers are light at night as well. These Arctic conditions and the special characteristics of the terrain are what creates the foundation for all-year outdoor tourism.

There is a public right of access in all of Lapland, which means that everyone has the right to roam on foot, skis or bike regardless of who owns the land or manages it. The public right of access is broadly respected in Finland and based on law. It applies to everyone, including international visitors. However, building marked trails on private land is not allowed without the landowner's permission, which must be considered in any outdoor activity development process.

The public right of access also does not apply in protected areas or in National Parks, which are managed by Metsähallitus (The Finnish Forest Administration). Metsähallitus plays a significant role in the use of land and protects nature in the national parks by directing visitors to maintained trails. In Lapland, approximately a third of the surface area for land and forest, including seven national parks and 12 wilderness areas, is governed by Metsähallitus. Consequently Metsähallitus is a key stakeholder in the development of outdoor tourism at both the regional and destination levels.

From the perspective of the destinations, the public sector and various project financing instruments play a key role in financing tourism. Besides specialized business entities within the municipalities, the most important of these are the Regional Council of Lapland (Lapin Liitto), the Center for Economic Development, Transport and the Environment (ELY Center), and Finnvera, a specialized financing company owned by the State of Finland, all of which work in regional development distributing both national and EU funding. National entities, such as the Ministry of Economic Affairs and Employment, Visit Finland, Business Finland and the Finnish Hospitality Association (MaRa) direct the development of tourism in Lapland by implementing the tourism policy as well as through lobbying. Concerning investment, the role of the private sector is also significant, and investment decisions by business have a direct impact on the destinations both in terms of operations and areas of emphasis.

e. Destination – Micro Perspective

Lapland is the main driver in Finnish tourism, when measured by growth in visitor numbers and awareness. The share of international visitors to Lapland has grown significantly in recent years. The appeal of Finnish Lapland is based on its unique, personalized nature experience and the ecosystem of tourism that has developed around this offering.

In 2019, Lapland registered more than three million hotel nights, not including the highly popular cabin nights and any bookings through digital shared economy channels, such as Airbnb. Altogether, it is estimated that there are more than 100'000 beds in Finnish Lapland, currently employing 8'000 people and delivering a total annual revenue of €1.5 billion (including the multiplier effect).

The current global COVID-19 pandemic is changing travel habits and giving rise to new trends. Lapland's summer season has several competitive advantages in this new market situation, led by its untouched nature, peace, quietness, space and safety. From an international perspective, one of the greatest challenges of tourism in Lapland is its seasonality and the disproportionate income currently derived from winter products and services. That's why future efforts must focus on the development of the summer season, specifically the outdoor activities segment.

There are different ways to segment the destinations in Finnish Lapland. In this report the following were used:

- Ski resorts
- Nature destinations
- Cities / towns with established tourism offerings

The lines between these segments can be blurred yet they help create a structure for the benchmarking analysis.

Today, most outdoor tourism activities offered by main ski resorts (e.g. Ruka and Levi) are based on services that are available near-by and easily accessible from the resort. The resorts are driven by the needs of their main snow season and hampered by limited touristic demand during the summer season. The largest ski resorts benefit from high quality existing infrastructure (e.g. accommodation, restaurant, services), however a review of outdoor activities on offer rapidly reveals a number of challenges and needs for development.

By contrast, the nature destinations (e.g. Kiilopää, Käsivarsi Wilderness Area) have until now focused on providing outdoor activities to active or experienced outdoor enthusiasts. Those experiences often take place in proper wilderness and are the main motivation for the person's visit. This is a significant difference when compared with the ski resorts.

Cities (e.g. Rovaniemi or Kemi) feature well-developed tourism service infrastructure and are relatively easily accessible. Their challenge is that they are viewed more as "stop-by" destinations, rather than proper outdoor destinations, even if they might already offer a wide selection of outdoor activities.

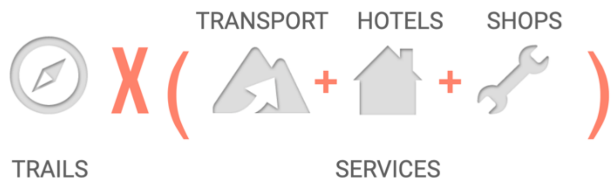
Although Finnish Lapland is a remote destination, it has succeeded in developing a strong winter season offer for international visitors. Initially this was thanks to connecting flights from Helsinki and special charter services, which have been supplemented by direct international flight connections in recent years. There are a total of six Finavia-operated airports in Finnish Lapland which are supported by a well-established collaboration model with resellers (tour operators) and basic train connections. The Covid-19 pandemic has dramatically changed the availability of flights which was already more limited during the summer season than during the winter. Accessibility through convenient flight connections remains a key factor for developing internation tourism in Finnish Lapland.

4. Conclusion

Nature: It's hard to beat the vast open nature and wilderness in Finnish Lapland, which is one of the main reasons for outdoor enthusiasts to visit. Even so, nature by itself won't be enough to attract large numbers of new guests. Several studies have shown that mountain bikers and other outdoor enthusiasts consider the nature experience together with riding pleasure as their main motivations. Simply put: Nature is the foundation, but the trails that provice access to nature are crucial for a top-quality experience.

In the European market, there are few destinations with access to vast and wild nature. Although the Alps provide pristine nature, they are densely populated and the human impact is visible everywhere. For outdoor enthusiasts, the vast and open nature in Finnish Lapland is something they don't have in their home region and it can be the region's unique selling proposition (USP).

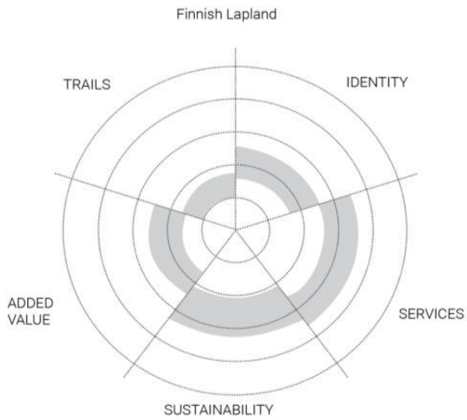
The equation of successful summer tourism



While trails and nature are the main pull factor (motivation) for outdoor enthusiasts to travel, the services infrastructure is more important for the local economy. Services are where value and a return on an investment (ROI) are created. Trails are a significant investment and have yet to be successfully commercialized on a big scale. Just as skiing slopes or Nordic trails are an investment, the lift tickets, hotels, rentals, shops and guiding services represent the ROI in summer or winter tourism.

a. Services

A big advantage for all destinations and communities in Finnish Lapland is their existing tourism infrastructure. It's easier to build the product (the trails) as part of an existing destination than the other way around. Services like hotels, restaurants, shops, guiding services and rentals are already there, but a few important steps need to be taken to adapt them to summer tourism.



First, the providers of these services need to see the value in summer tourism and witness the market grow.

Second, they need to understand the needs of the new guests. That's the foundation for creating a high quality costumer journey and service design that withstands an international quality test. Finnish Lapland will be competing with international destinations that have started this process much earlier.

What needs to be done:

- Develop business models, a bike outdoor tourism concept and tailored vision for each community and destination
- Implement the "Welcome Cyclist" quality standards for bike hotels
- Train hotel and other service staff for the needs of MTB tourists and their bikes
- Develop a training/ education program for guides and instructors for MTB
- Plan to increase transportation capacity (by rail and/or air) into Lapland in the long term
- Optimize the customer journey for outdoor enthusiasts
- Adapt lift infrastructure and train lift staff for handling bikes
- Create best practice trails that are sustainable, top quality and fit the right target groups for educational proposes and convince stakeholders of similar projects
- Develop MTB packages that include already existing services in the destination (transportation, guiding, hotels, restaurants, other tourist attractions, small businesses, etc.)

- Create common/regional bike tickets on lifts or public transport for transportation

b. Trail / Infrastructure

A common understanding of quality and sustainability standards needs to be established across Finnish Lapland. A trail is not just a line through the forest. The trail provides the main added value experiences the guest is seeking. Combined with nature, the trail is the main motivation for them to visit.

Existing trails in Finnish Lapland are competing with high quality trails worldwide. In other destinations, trails were designed for the best guest experience and carefully selected target groups. By implementing common standards for trails in Finnish Lapland, the trail infrastructure can be built meet the guests' expectations. In addition, rising visitor numbers will cause erosion that will impact the quality of trails and if not designed and built right, the maintenance costs will increase rapidly.

What needs to be done:

- Educate stakeholders (land management, environmentalists, national park) on benefits and impact of trails and their management requirements
- Develop shared trail quality standards for sustainability, planning, design and construction together with stakeholder groups
- Implement a common signage framework aligned to international standards
- Create uniform maps and an online trail database
- Build high quality trails for different skill levels and customer segments
- Systematically develop new trails and maintain existing ones
- Ensure funding for new trail development
- Provide training for trail specialists in design, planning, construction and maintenance
- Develop a plan for co-existence, shared trails or user separation on trails

c. Identity

The “identity” of an outdoor tourism destination is what holds all the service providers and stakeholders in the community together and unites them behind the effort.

The identity includes:

- Knowhow of summer outdoor tourism
- Involvement in outdoor sports by the local population
- Common vision and shared branding
- Marketing and events

Finnish Lapland has a great opportunity to develop a common outdoor activity identity, to profit from each destination’s experience and to share the costs of development. After all, the main competition for each local destination lies not within Finnish Lapland, but in in the Alps, the Mediterranean or outside of Europe, where popular summer holiday destinations are located. For the coming years, the challenge will be to establish an awareness in the target markets for Finnish Lapland as a summer outdoor destination, and that will be much more effective if the region works together.

What needs to be done:

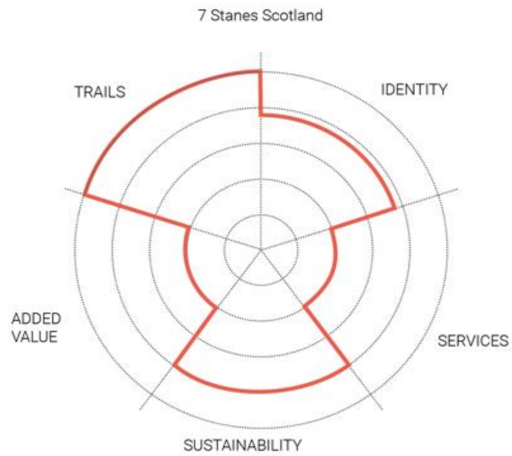
- Build an identity for Lapland outdoor activity tourism
- Educate key stakeholders on value of outdoor summer tourism
- Create a lobby group for outdoor summer tourism
- Develop local events to build a local bike culture
- Start school programs for trail-based activities to grow acceptance and local identity
- Organize trail / bike events for stakeholders, tourism operators, local communities
- Start educational events such as an MTB tourism conference
- Develop events that fit the local community
- Create a long-term plan for international events

5. Benchmarking six destinations

To benchmark Finnish Lapland from the summer outdoor tourism perspective, Allegra Klue chose destinations that encountered similar challenges and have done especially well.

a. 7 Stanes, Scotland

Scotland has become one of the prime MTB destinations in Europe over the last twenty years. The development of the MTB tourism infrastructure there started in 2001 after the Foot and Mouth disease hit the country and rural areas were suffering. The Scots took this disruption as a chance and with the help of EU funding they started systematically developing MTB trail centers under the name of "The 7 Stanes". By 2005, they had 500'000 annual visitors at their new attractions. By 2020, the number of visitors has risen to 1.4 million.



7 Stanes, Scottland

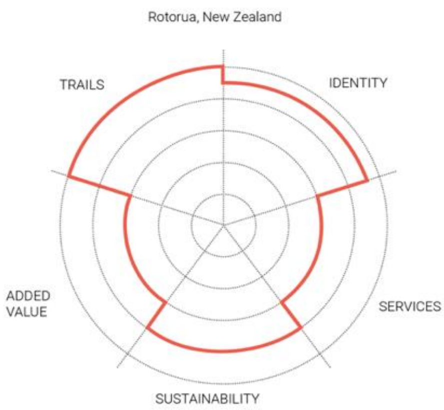
Comparable in:	Remoteness, Accessibility, Diversity
Not Comparable in:	Lack of winter based tourism, Existing destinations
Trail Infrastructure:	Despite the remoteness of the trail centers, the 7 Stanes attract very high visitor numbers which is due to a very high level of trail quality. Over the past twenty years, they've set a new quality standard for trails.
Services:	As none of the seven trail centers are actual tourism resorts, they lack in commercial infrastructure and services. It's impossible to compare the 7 Stanes to a tourism resort in Finland or even a community or village. At most trail centers of the 7 Stanes, there's only a car park and maybe a café, so this benchmark ranks very low on commercializing the visitors by offering touristic services.
Identity:	Over the past twenty years, the project has managed to reach a wide spectrum of UK society. The 7 Stanes and other, newer MTB projects have a strong focus on the local community and no touristic purpose. Activation of schools, families and other community-based activities have shown great success.
Sustainability (Ecological, Economic, Social):	The 7 Stanes have put sustainability at the core of their trail development from the beginning, which resulted in a high ecological sustainability of the infrastructure. By involving locals in the trails, they managed a high level of social sustainability. The economics of 7 Stanes trail centers are not a benchmark, as they generate a low value for local economies compared to other tourism resorts.
Economic Value created:	Compared to classic tourism destinations with a smooth customer journey and well-designed products, the Scottish MTB tourism clearly lags behind. Large visitor numbers are

generated in remote forest parks with only very little chance for customers to use local services. Nearby towns are not set up for tourism. It's easier to create a touristic product (like a trail center) than a touristic ecosystem (like a resort or destination).

How did they do it?	"Scottish taxpayers have invested financially in mountain biking through public agency funding; the partners and other stakeholders involved in mountain biking have given their time, imagination, skills and energy. Together we have given taxpayers a considerable return on their investments." Source: MTB Strategy-Scotland-2019-2025

b. Rotorua, New Zealand

Rotorua is a small community of around 55'000 residents. Travel there from Europe takes roughly 40 hours or more. The town has managed to become the best MTB destination on the southern hemisphere and attracts large numbers of international and regional mountain bikers. Starting as a community project, the local mountain bike club actually laid the foundation for a successful MTB destination.

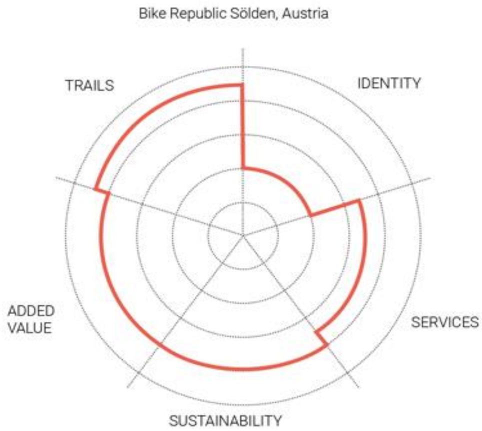


Comparable in:	Remoteness, Accessibility, Community size
Not Comparable in:	Lack of winter-based tourism, Existing Destinations
Trail Infrastructure:	The Rotorua trail infrastructure could easily be the best on the southern hemisphere. The quality of trails, dirt and riding experience is hard to beat. The Whakarewarewa Trail Center offers great experiences for all levels of riders on almost 200 kilometers of trail network.
Services:	Inside the park, there are good services from rental, uplift service, cafes and guiding. The town itself lacks MTB tourism specific services, such as MTB hotels or cycling friendly infrastructure. But since Rotorua is a tourist town, there are plenty of general tourism facilities.

Identity:	The local MTB culture is very strong. The Rotorua MTB Club and nowadays the Trails Trust are great examples of what proper momentum can create. What makes this local MTB community so special is that it represents all social forms and is very broad, not just die-hard, young and male MTB freaks.
Sustainability (Ecological, Economic, Social):	The local trails have always been planned and built sustainably, but the ecosystem in that tropical and industrial pine forest is not as sensitive to the impact of MTB than in some other places in the world. Also, socially the Rotorua MTB tourism has a sound foundation as it's created by locals.
Economic Value created:	While the area of the Rotorua Trail Center offers several services to mountain bikers and large events have been created in the last couple of years, the touristic destination and the town of Rotorua don't have any MTB specific services. MTB visitors use the common touristic infrastructure and add value to the local economy through that. A 2018 impact study found that MTB tourism adds 26 million euros annually to the local economy of the 55'000 inhabitants' town of Rotorua.
How did they do it?	In 2005, the very active Rotorua MTB club started applying for permits and building trails in their local forest. The local community developed such a dynamism and passion that out of their own energy they've created a world class MTB destination. Funding now comes from a Forest Fund specifically designed to further MTB tourism.

c. Sölden, Austria

Sölden is a large and famous ski resort in the Tyrolian Alps. Until 2014, summer tourism was a niche without importance, and the local economy was relying on ski tourism. Most local business owners were not interested in summer activities as their turnover in winter was large enough and most were exhausted after a long winter season.



Comparable in:	Relative Remoteness, Community size, Systematic development, Lack of summer-based tourism, Existing Tourism Destination
Not Comparable in:	Accessibility, Extreme remoteness
Trail Infrastructure:	Sölden started creating MTB trails in 2014 and now features about 60 kilometers of lift accessed MTB trails. After initial mistakes in the trail quality that caused sustainability, maintenance and legal issues, they switched to high-quality MTB trail building and created their own “Sölden Trail Building Standards”. To date, Sölden is the only destination that have enforced their own sustainability rules, and those standards were later adapted as the statewide trail standards

	in the state of Tyrol, Austria. The trails are all lift accessed and see up to 200'000 frequencies per summer, while causing only 5% maintenance costs.
Services:	Sölden is a ski town and has excellent service for ski tourists in winter. Adapting their services to MTB tourists and understanding their needs took some time. While fundamental services (lift, rental, guiding) were adapted very fast, other more specific services grew with the understanding for the mountain biker's needs.
Identity:	The Bike Republic Sölden was and still is a top-down project. It was initiated by the local tourism organization. For the past two years, the local MTB scene and identity has been systematically supported. Now the locals grow up becoming mountain bikers as everyone is already a skier in a ski town. The local youth MTB club sees record numbers of kids and after work rides are common with locals in summer.
Sustainability (Ecological, Economic, Social):	The environmental laws are extremely strict in Tyrol, so the planning and construction of trails had to be very sustainable. The construction of Sölden trails revegetates most of its impact and in planning, the plans are made to avoid impact to rare species. Low maintenance costs guarantee a high return of the MTB tourism and at the same time attract a lot of visitors as their trails stand out in the regional competition as the best.
Economic Value created:	The MTB tourism project in Sölden was created to optimize revenue streams. Sölden created a concept, a business plan and a return-on-investment plan before starting to build any trails. Their return on an investment of approximately seven million euros into trails came three years after, with 165'000 visitors each spending up to 190 euros a day.

How did they do it? In Sölden it took one strong man with a vision. That man was tourism director Dominik Linser, who believed in his vision and was able to convince and motivate key partners. Most of the funding came from the tourism tax, from the lift company and some from the state government.

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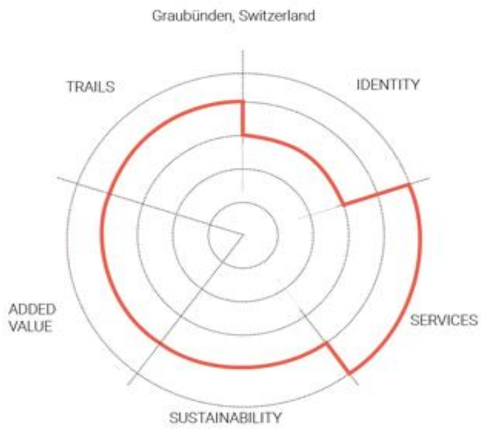
d. Graubünden, Switzerland



Summer tourism has traditionally had a minor importance in Graubünden as the region boasts many ski resorts including famous names such as St. Moritz and Davos. The region now appears under one touristic brand that covers 17 regions and over 30 destinations. Some destinations are small towns, others are big fancy resorts like St. Moritz with hundreds of hotels and multimillion dollar operations. The diversity is very high, yet Graubünden has managed to create common standards and a common identity. Mountain biking has been systematically enhanced since 2009, when the largest MTB tourism project, called "GraubündenBike" was started. As a joint venture between the regional government and the destinations, each financing a half, over 4.5 million Swiss francs have been invested. As a result, Graubünden is Switzerland's number one MTB tourism destination and ranks on the top in the Alps.

Comparable in:	Diversity, Community sizes, Lack of summer-based tourism, Existing tourism destinations, Systematic development
Not Comparable in:	Accessibility, Extreme Remoteness

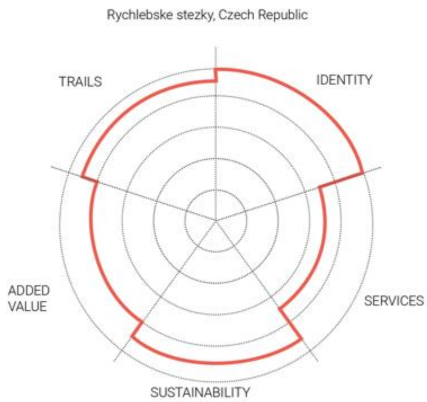
Graubünden, Switzerland

Trail Infrastructure:	Graubünden and its destinations have had a big legislative advantage: the almost 26'000 existing kilometers of hiking trails were always available to be ridden on bikes. Those existing trails were and are carefully mapped out in master plans that consider the different user groups and make sure that co-existence between hikers, trail runners and bikers is maintained. The legal process to approve and create new, MTB specific trails, was laid out in an early stage. Regional standards on quality, signage, planning, and maintenance were established and are accepted in all of Graubünden. Even farmers in the region were educated on how to create safe and MTB friendly fence crossing on trails.
Services:	As part on the project "GraubündenBike," a lot of basic documents and standards were created. Product development workshops were held, market studies and know-how distributed, and an overall awareness of the customer's needs and quality was created. Standards for MTB specific hotels were established, and blind tests regularly executed.
Identity:	A common identify was first established through the regional project that involved a lot of local stakeholders and opinion leaders. To introduce everyone into the topic, the project brought decision makers together on bike rides to get them to feel the topic of MTB tourism. Over the years, local MTB communities have formed and received support from the regional project in developing their own ideas. As a leading resort in Graubünden, Lenzerheide has hosted four MTB World Cups and in 2018 the UCI World Championships.

Sustainability (Ecological, Economic, Social):	The environmental laws are extremely strict in Switzerland and environmental organizations play a major role, which means that the planning and construction of trails had to be very sustainable. Specific maintenance manuals and training programs were developed to ensure sustainability.
How did they do it?	From the beginning the goal was systematic economic gains in tourism. First, the economic facts and benefits were laid out and proven to the government, then the funding was secured and a systematic project covering all the fundamentals of MTB tourism was rolled out.

e. Rychlebske stezky, Czech Republic

Rychlebske stezky is a mountainbike trail center near the small village of Cerna Voda which lies about 200 kilometers east of Prague on the border to Poland. Černa Voda took the grassroots approach, working directly with the community and an army of volunteers to build trails. Rychlebske Stezky adopted a methodical approach. The majority of trails were built by hand with limited funding. The first year they opened a handful of trails and have added only one trail a year since. Rychlebske Stezky has created an extremely positive and sustainable model. They have grown into a popular regional destination while building a community that supports their vision. Their success can be measured in numerous ways, including the revitalization of the town Černa Voda. In 2009, the MTB community bought an old farmhouse and made a trail center. This central hub became a hive of activity. It was not only a trailhead, but an info center, bike rental shop, and a pub serving up home-made dumplings and legendary pilsners.

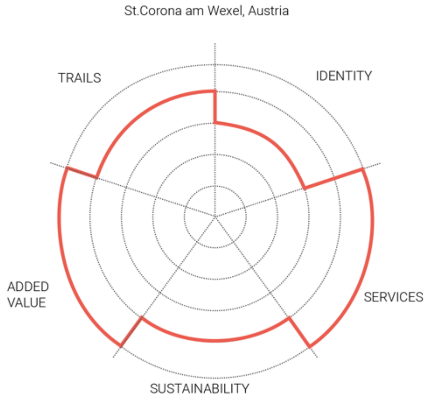


Rychlebske stezky, Czech Republic

Comparable in:	Small community, lack of tourism
Not Comparable in:	Accessibility, Extreme Remoteness
Trail Infrastructure:	Rychlebske stezky started offering very high-quality single trails in the 2000's. Mostly hand-built, the trails were always focused on the highest sustainability level. As other trail centers in the Czech Republic suffer maintenance issues and use heavy machinery impact to try and stay on top of erosion, Rychlebske trails are known to be high quality.
Services:	Services have slowly grown together with the network of trails. First, the old farmhouse was the main hub, now accommodation and other services are offered by different local people around the town.
Identity:	In the past decade, more people joined, and the volunteer pool became like an army. Rychlebske Stezky began to develop a fan base, attracting people of all ages to build and ride. They want everyone to feel like an important part of the community and give each volunteer special attention. For example, the volunteers may get a t-shirt with a special design, something not for sale to the public. Trail workdays involve beer, food, and music, not just digging in the dirt and moving rocks.
Sustainability (Ecological, Economic, Social):	Besides ecological sustainability of the trails, the economic and social sustainability is special about Rychlebske Stezky. The business model of the trail center is community based and added value from mountain biking is spread to different members of the community. Besides creating 15 to 50 jobs in a community of less than 700 population, it has brought people together with a common goal.

Economic Value created:	There are now 15 full-time employees that work for Rychlebske Stezky and another 15-20 that are employed seasonally. The marketing director moved from Prague to Černa Voda because it had everything he needed, especially quality of life and nature.
How did they do it?	At the beginning there was a guy with a vision. His special talent was not to build great trails but to involve others and make them feel part of a special community.

f. St.Corona am Wexel, Austria



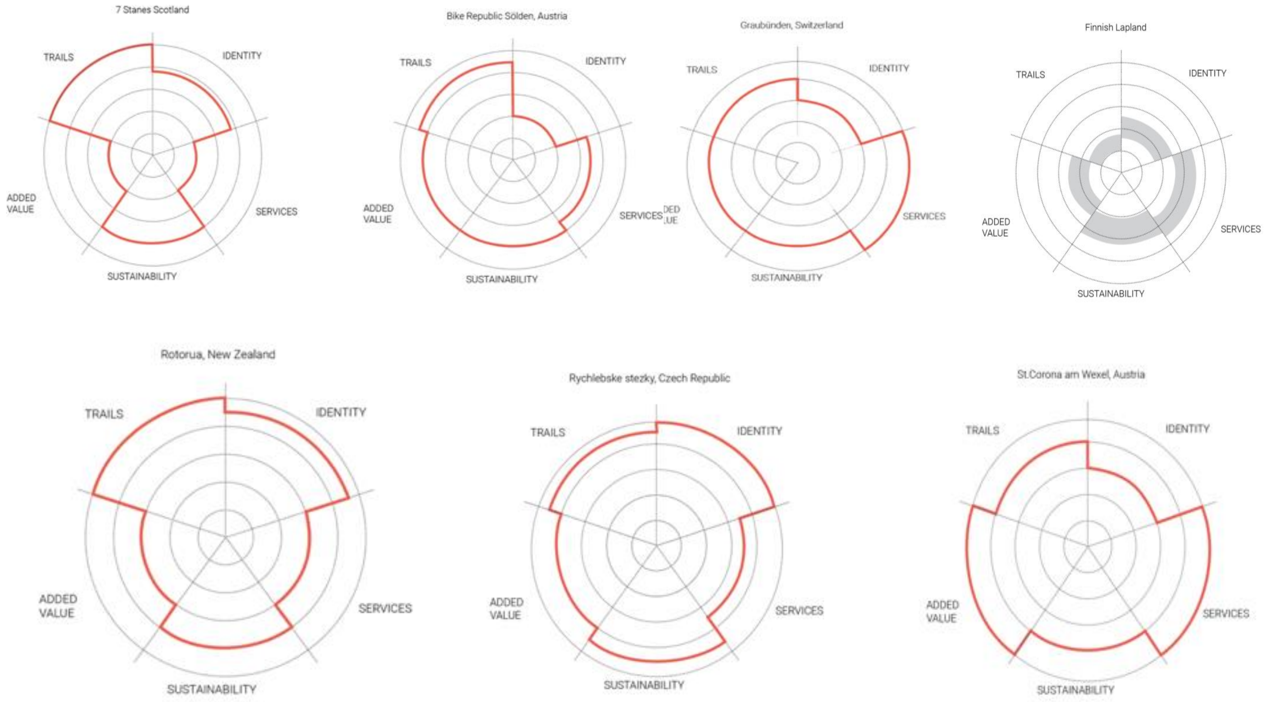
"St. Corona is a model for ski resorts in the Alps that are transitioning to mountain biking, hiking and other tourist offerings so that they don't have to depend on snow" wrote the The Washington Post in an article in February 2021. Located 90 minutes from the greater Vienna area, the small ski resort collapsed less than 10 years ago with the ongoing decline of winter tourism. The transformation to an all-year destination started with a radical focus on families with small children that want to experience a safe and convenient mountain bike and outdoor activity.

St.Corona am Wexel, Austria

Comparable in:	Small community, End of Winter Tourism
Not Comparable in:	Accessibility, Remoteness
Trail Infrastructure:	The trails were all-purpose built for mountain bikers at entry level or kids. The initial offer included a magic carpet and only 80 meters of trails. In the following years, the network has seen the addition of increasingly larger loops. But still to this day, the complete offer is very compact and relatively small for its economic impact. The infrastructure is spread over only a small area, so its impact on nature is kept small, permitting is easy and construction and maintenance relatively quick
Services:	The area is service designed to optimize the user experience and offer maximum comfort to the guests. At the bottom of the small trail park, that is accessed by a magic carpet, there are a restaurant, shops, rental and a bike school. The MTB Kids Park is just one product at St.Corona am Wexel. In addition there is an activity park called "Motorikpark" and a summer sledding offer. The rental fleet of mountain bikes was expanded from 25 bikes in the first summer to more than 100 bikes in the second. Shuttle services have reached a dimension, so that a new lift just for bikers will be installed in the near future.
Identity:	The "Family Arena" is clearly positioned, leaving no doubt that the offer is not for thrill seekers or extreme sports enthusiasts. It's fun for the kids and safe for the parents.

Sustainability (Ecological, Economic, Social):	The Family Area has triggered a series of private investments in the area, from new hotel businesses to a new project for remote working for urban Vienna population. New jobs have been created and St Corona has become a model for sustainable development in one of Austria's most rural areas.
Economic value created:	Besides the economic impact in the whole region, St. Corona also charges a ticket for the use of trails and playgrounds. Daily tickets start at 3 and 6 Euro. This entry fee for trails is a very unusual solution that has turned out to be viable and very accepted amongst guests.
How did they do it?	Having been an initial partner in the developments in St. Corona, Allegra can identify two factors as crucial for the destination's success. First, there was a clear business model and a clearly defined strategy of what the destination should become and what it should not become. Second, the project was immediately anchored within the local community, triggering initial private investment and large public impulses.

g. Overview and Conclusion



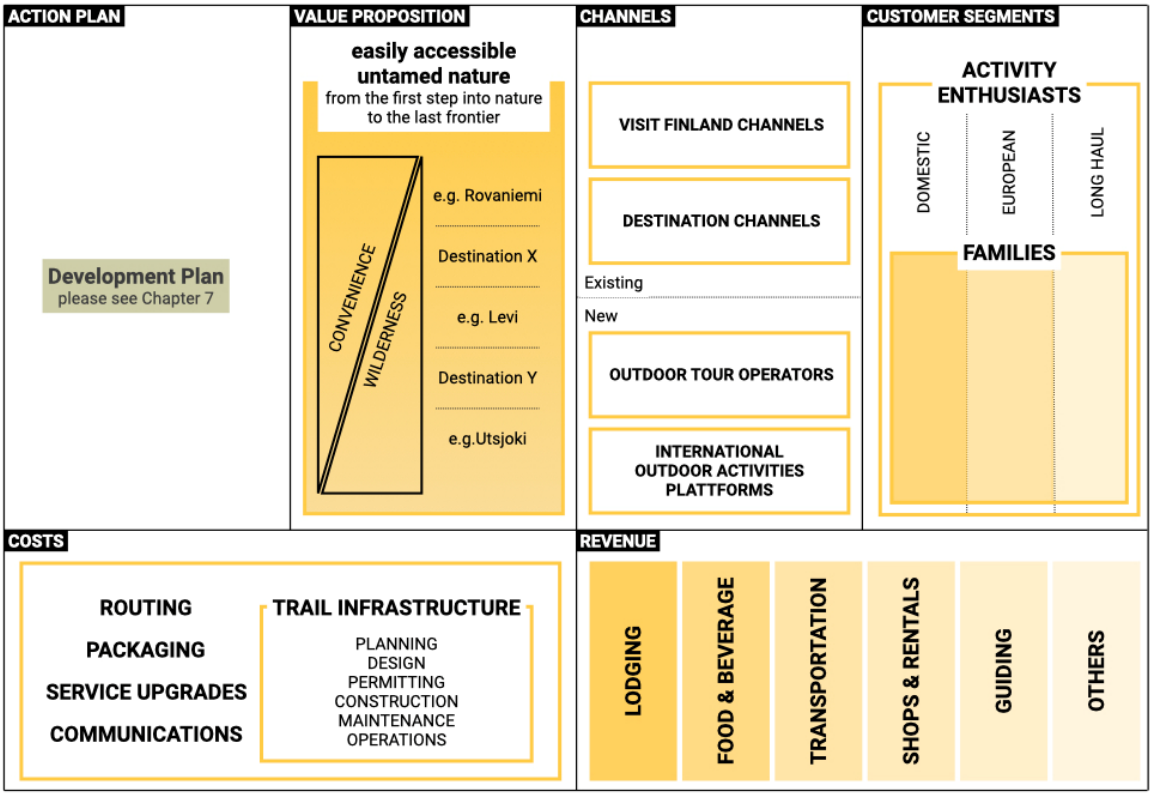
One thing all these successful destinations have in common is a comprehensive development plan through a business model and a strong identity. Rotorua, Rychlebske and 7 Stanes were born out of a local bike identity. Sölden, Graubünden and St. Corona have a comprehensive business model at their core.

While Finnish Lapland ranks low in trails and identity compared to the top destinations, the region is doing well in terms of services. The Finnish destinations already know tourism, have service infrastructure and a good understanding of tourism from their winter operations. The trails will be key to the summer experience and are the main reason for outdoor enthusiasts to travel to a destination, which is why they need to be of top quality and at a high level of sustainability. Identity is what embodies the know-how and understanding of the summer outdoor tourism sector. It's knowing what the clients want and what target groups to focus on. However it is also very much about living an outdoor activity lifestyle and comprehending traveling for hiking or MTB tourism holidays. There are excellent examples for summer outdoor tourism in Finnish Lapland, but those are unicorns and often relatively small service providers.

Developing the local identity for a destination should be the priority number one. Getting everyone to see the value of summer outdoor tourism, developing a common direction and a shared plan for the development based on a well-founded business model will start a process of self-improvement inside the destinations and reduce the amount of outside help that needs to be brought in.

Increasing the quality of trails and the trail experiences is another key task. Since the trails will take a long time and a lot of investment, they should come at the beginning of the development. Everything starts with knowledge of sustainable trails and common standards.

6. Business Model Canvas



Allegra uses the so called 'Canvas' as a tool to quickly shape the future business model of an outdoor destination. It is a practical and easy-to-read overview and acts as the permanent point of reference for all stakeholders that are involved in the development process.

Target groups

The key target group has already been defined as "activity enthusiasts". Within that target group, the segment of "families" is prioritized. While the objective is to attract this segment for longer stays (one week or longer) from international markets, the first milestone should be to attract guests from near-by markets for a few days. Due to the time needed to develop the necessary infrastructure especially the trails, it will not be possible to focus on long haul guests from the very beginning.

Value proposition

The value proposition does not refer to a set of services or infrastructure features, but to the value proposition to the customer. In the case of Finnish Lapland, the value proposition can be directly deducted from visitor needs, which is:

- easily accessible
- untamed nature
- from the first step into nature to the last frontier of wildnerness

The destinations in Finnish Lapland can offer different levels of convenience and wilderness, depending on their accessibility and current infrastructure. As an example, Rovaniemi might offer a mountain bike park for young families with a high degree of service convenience, while Utsjoki might develop a selection of adventure routes for explorers.

Distribution and Communication Channels

For communication and distribution of a product, different channels can be activated. Since the consumption and production of a vacation is tied to a time and place, the main channels for outdoor tourism in Finnish Lapland are for communication.

There are more than 130 channels available to an average destination. The most important and effective for Finnish Lapland for its new offer of outdoor activities are the following:

- Existing channels of Visit Finland and internal partners.
- Destination channels aimed at current visitors
- International platforms for outdoor activities (such as Outdoor Active or Komoot)
- Domestic tour operators.
- International tour operators

Cost drivers and revenue streams

The dilemma is that the highest costs will not incur where there will be the highest return of revenue.

Investments in trail infrastructure (planning, construction, maintenance, signage and more) will demand the highest budgets. In comparison, costs for additional service infrastructure or marketing are significantly smaller.

Revenue streams will be triggered at different service points along the customer journey, from highest to lowest: lodging, food & beverage, transportation, other services (for instance rental and guiding).

7. Development Plan and Next Steps

To become a successful outdoor destination it is key to prioritize the next steps. Our recommendations are for Finnish Lapland as a complete ecosystem that consists of different stakeholders and not directed at one specific organization. Therefore, we recommend the following prioritization:

a. Involve and Unite: Identity

Form one or several groups to create a strong alliance in support of summer outdoor tourism and its development.

- Create a super lobby group of top level decision makers (e.g. destination CEO's, politicians, private stakeholders). Involve them into mountain biking, educate them on the facts and light their fire for the topic. This super group together with VF should create a common vision and set goals, take a study trip and handle the lobbying (for details on the study trip, see chapter 9).
- Spread facts and market research on the topic
- Create local action groups in destinations and communities
- Do NOT start with a press release about your intentions!

b. Define and roll-out a Comprehensive Development Plan and Roadmap (Master Plan)

Use this study or stage a workshop with local stakeholders to define development needs and define a comprehensive whole of Lapland master plan.

- Clarify responsibilities between agencies and stakeholders
- Develop an overall concept and then a business model for each destination specifying the local development steps
- Secure funding on national and local levels with the help of the super lobby group
- Choose a passionate person for project management; they will have to undertake a lot of persuasion work
- Break down the development plan into regional and local work packages
- Form working groups and systematically start developing each work package

c. Identity: Educate and Convince

Know-how must be accessible to ensure long-term success, so we recommend

- Organize a roadshow with impulse presentations
- Create a common library and learning platform
- Identify existing know-how and opinion leaders and recruit them
- Start creating a common identity through events and common activities
- Offer help for each destination and community to create their own busines plan and summer outdoors tourism concept in order to secure their own identity as part of the regional master plan

d. Start with trails

Trails are the main provifers of a customer experience in trail-based activities. Without high quality sustainable trails, long-term success is unrealistic.

- Offer support in financing and know-how in trail planning, design, construction and maintenance, based on the shared sustainability concept
- Launch a training program for local municipalities and construction/ outdoor companies on sustainable trail development
- Review existing destination business models and roll out packaging workshops

e. Involve more operators

Involve accommodation providers, lift companies, restaurants, shops, guides and services providers and help them design and implement the right offers to be successful in the market.

- Establish the required quality standards
- Establish guidelines to help them create products & services of high quality
- Ensure booking and online sales channels are seamless and friction free

f. Promote local outdoor culture and events

Local outdoor sports culture will ensure long-term success. Start small events for locals, school programs, help local start-ups with loans and guidance. Also start planning international events.

8. Suggested Roadmap and Work Packages

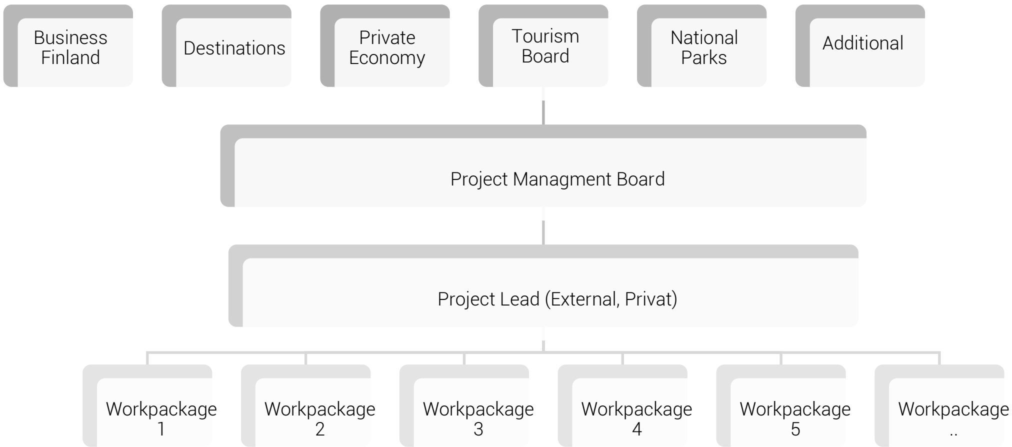
Workpackages Outdoor Tourism Development Finnish Lapland

Category	Item	National Level	Region Level	Destination Level	Roadmap 21	2022	2023	2024
Start-Up	Inform everyone on the Outcomes of the Benchmark Report							
	Lobby super group. Educate them. Then create a common vision and set goals. Study trip. Lobby work.							
	Campaign with facts and market research on the benefit of Outdoor Tourism and create local action groups							
Basics	Comprehensive Development Masterplan Plan, Clarify responsibilities, Secure Funding, decide on a project management (PM) and a board							
	Business Model as a development concept for each destination							
	Break down the master plan into regional and local work packages							
	Form work groups and start systematically developing each work package							
Identity	Start a roadshow with impulse presentations							
	Create a common library and learning platform							
	Common identity through activities and events							
	Work on target group definition an market position on regional and local levels							
	Create and define content for marketing							
	Start creating events (International and Regional)							
	Build-up distribution and sales							
	Start school programs, Kids on Bikes							
	Start a Outdoor Tourism Congress							
Trails	Develop Criteria, Levels, Signaging for Mountainbike-Routes and -Trails							
	Develop Rules and Measures on Shared Use and Trail Experience Quality							
	Define Process for planning and permitting of Trails							
	Develop Specific Infrastrcture for Kids and other Levels							
	Establish Trail-Masterplans for each Destination and Municipality							
	Establish Common Online Portal for Trails an Navigation							
	Educate and Establish Quality Standards on Trail Construction and Maintentnace							
Serivces	Support for local Product Development							
	Help local start-ups with loans and guidance							
	Design Think the Costumer Journey in each Destination and in(to) the Region							
	Help model Service Providers (Bike-Schools, Parks, Hotels, Shops) and showcase them							
	(Int.) Tour-operator sales events							
	Optimize Travel into the desination, increase capacity							
	Implement on Regional Quality Standards for Bike-Hotels							
	Education for certified Guides and Instructors							
	Mystery Check Quality and introduce Awards							
	Suggest Technical Solutions for Bike Service in Hotels, Transport, Lifts, Washstations							
	Specific Bike Tickets for Lifts and Public Transport							
Controlling	Measure success, gather and publish data							
	Review Stakeholders Needs							
	Update the workpackage list and roadmap							
	Mystery Check all the developed Product and Trails							

9. Questions and Answers

How should the project be organized and structured?

Looking at similar projects in Scotland or Switzerland, the projects were structured as follows:



At this point of our analysis, we cannot determine which organizational structure is ideal to implement these recommendations. We would have to dive deeper into the organizational layer.

What study trip would be recommended:
We'd recommend a study trip to the Swiss and Austrian alps. The benchmarks in those areas are the most similar to the situation and resorts in Finnish Lapland.

Day 1:	*Fly to Zürich/ Munich, travel to Lenzerheide. Get a glimpse on the "Apres Bike Feeling" in the evening.*
Day 2:	*Meet the brains behind Switzerland's MTB Destination #1 and the official "*Bike Kingdom Lenzerheide*". Learn how they implemented their marketing strategy, branding and how it's all digitalized. With this best practice you can learn from the mistakes they've made in the past 10 years. Ride the trails, have lunch in their restaurant at 3000 meters.* *Afternoon/ Evening: Visit* **Trail-Center Thusis.** *A small group of MTB activists have created a tourist's attraction for families and one of Switzerlands largest MTB events. It's all based on volunteer work and passion.*
Day 3:	Visit Engadin Valley*, where to large trail network is mostly shared between hikers and MTB. Several villages make up the destination that is connected with trains and cable cars. One of the world's best examples for touring MTB and the integration of public transport. Ride the Bernina Pass with its unique Train/Trail combination. Talk to the tourism director of Engadin, St.Moritz.* *Transfer to Livigno. A busy Italian summer resort in the Alps. They have turned from 90% winter business to a more balanced 60%/40% within 15 years with the help of MTB tourism.*
Day 4:	Transfer to Sölden*. The Bike Republic of Sölden is Europe's fastest growing MTB resort. Talk to the man behind the scenes, tourism director Dominik Linser. He can tell you how and why they've invested 6 million Euros into the MTB development, and why they have already seen a return on that investment.*
Day 5:	Return to Finnland or visit Innsbruck, Serfaus, Nauders, Leogang, Davos or one of many other destinations in the region.

What are Lapland's means of distinguishing itself from other similar destinations; what are the pull factors and unique selling points as an active holiday destination?

Wilderness vs. comfort on different levels. While top quality tourist services and infrastructure in most areas already exist wilderness is vast but accessible.
It's important to find Lapland's USP in the outdoor tourism market, create a strategy and follow that. It could be epic wilderness trails or the number of trails available, or even a combination of comfort and wilderness. Surely Lapland's unique characteristics need to be part of a market positioning. For now, we don't have enough information available and haven't worked specifically on that topic to come up with a clear and simple answer to this. By deciding on a target group and a business model the options will be narrowed down, and experts can help define means of distinguishing Lapland from other outdoor destinations.

Does accessibility become a hindrance for the development of mountain biking in Lapland?
Not if transportation is designed seamless and rental services are up to international standards. For an international market the products must be oriented for long term stays of five or more days. Other MTB destinations require travel up to10 hours as well:
La Palma Canary Island – 7 Hours
Reykjavík, Iceland – 7- 15 Hours

Is an activity enthusiast interested in train travel and prepared to take a 10-hour train journey from Helsinki to reach the destination in Lapland?
Yes if the product at the end of the trip is right. It has to be unique and only available in Finnish Lapland.

Mountain biking is identified as the key product in this study. But what are the supporting products, services and activities, that already exist in Lapland and are of interest to the target group?

All trail-based activities. Mountain Biking, trail running, hking, cycling touring, bike packing, cycle cross. All these activities can be staged on different trails and require similar services: transportation, accommodation, guiding, instructing, rental, washing facilities, maintenance, shops.

Does an activity enthusiast look for guided or independent activities?
Both. The more experienced or skilled are less likely to book guided activities. Unless wilderness or wayfinding and transportation require a certain amount of local help. For example, the island of La Palma in the Canary Islands is popular with expert mountain bikers. They all ride with a guide that organizes shuttle services, food and provides experiences on the best trail routes.
The entry level activities offer higher margins / value for a destination. The market for guiding tends to grow with the development of the outdoor market.

Is the selected target group, activity enthusiasts, correct for this study?
Yes, according to several studies of the market.

How to reach the right target group?
First develop a destination business model and define the right target groups for you (sub-segments of the outdoor enthusiasts) . Then create products that are unique and tell a story. A good example are the Rovaniemi 150 and 300 races. The target group of those races are extreme sports enthusiasts, but the event is so unique that it's well known in the MTB scene.

How much has been invested in mountain biking in Lapland?
Different resorts have invested in trails. A more detailed assessment would need to be made for further detail. Successful MTB destinations have systematically invested in trails (like Tyrol with the the state government financing up to 50% of trail projects) or in services like accommodation, shops, staff education (like Graubünden or Sölden with its comprehensive development projects). See chapter 8 for more detail.

How can transportation capacity be successfully increased in the long term?

The planning of transportation capacities is a long term project. Multi year commitments have to be elaborated and signed by transportation providers with the other contributors to the value chain. Further, it needs to be taken into consideration, that transportation in the context of outdoor tourism means transporation services for people, equipment, unassisted luggage and special ticketing.

How are the words service and infrastructure to be interpreted?

In this report "services" refer to touristic services. As mentioned in the equation of successful outdoor tourism, services are all the points of contact with the guests where economic value is generated.
"Infrastrucutre" refers to tourism infrastructure and in outdoors mostly the trail. The trail holds the experience for the tourists. In some cases "service infrastructure" can mean transportation and accomodation facilities or similar that need to be technically adapted to fit the needs of mountain bikers or other outdoor entusiasts.

Which services are necessary when a destination wants to become an internationally successful outdoor / MTB destination?

Different services are needed to cater to outdoor guests and make their experience more comfortable. Each destination must choose to offer those services that fit with their chosen business model and positioning.

Lodging

- *Hotels and apartments that cater to outdoor guests, with specific service infrastructure (like a drying room) and services (for instance a laundry service or bike wash)*

Catering

- *Food & beverage before, during and after an adventure, fueling energy and connecting to local culture*

Transportation

- *Transportation infrastructure and services for people, their equipment and their unassisted luggage*

Shops & Rentals & Repairs

- *Possibilities to purchase spare equipment or replace broken and forgotten items*

Guiding

- *Assisted experiences to optimize precious vacation time towards maximized experience*

Others

- *Emergency services, common services (for instance a supermarket)*

The quality standard of each service can be defined in catalogues with specific criteria.