



RESEARCH SERVICES

BRITISH COLUMBIA'S SEA KAYAKING SECTOR (2005)

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In cooperation with:



Wilderness
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EXECUTIVE SUMMARY

Tourism British Columbia (Tourism BC), in partnership with the Sea Kayak Guides' Alliance of British Columbia (SKGABC), sought to gain a more comprehensive understanding of the commercial sea kayaking sector operating in British Columbia. Consequently a survey was undertaken of all sea kayaking businesses operating in British Columbia in 2006.

The 2006 survey of sea kayaking businesses identified 114 companies offering sea kayak activities within the province of BC. For the purposes of this research, the sea kayaking sector was defined as commercial sea kayak businesses offering services and products to clients engaging in ocean-based sea kayaking activities. Such services and products included sea kayak tours (day trips and multi-day trips), kayak rentals, sea kayak instruction, and recreational and professional guide training. The database compiled for this research contained two sub-populations: member businesses of the SKGABC and non-member businesses. The SKGABC executive provided a current 2005/2006 membership database. The non-member database was compiled from Research Services' existing database of sea kayaking businesses operating in British Columbia, and was updated with the assistance of the SKGABC executive and with various other techniques, including internet and yellow pages searches.

On average, businesses have been in operation for 11.5 years. Most businesses are relatively small, employing on average, 3.2 full-time staff throughout the year and 5.7 full-time staff through the summer months. Businesses also employ an average of 1.6 part-time staff year round, and 2.8 part-time staff during the summer months.

Sea kayaking businesses provided products and services to almost 70,000 clients in 2005. Overall, the 2005 gross revenues for the sea kayaking sector were approximately \$14,255,000. Gross revenue attributable to tourists participating in sea kayaking activities in British Columbia was \$11,277,700 for all businesses.

The vast majority of companies operate either in the southern part of the province or the Queen Charlotte Islands, with a small percentage of companies operating on northwestern Vancouver Island, and the North and Central Coasts. Overall, the majority of businesses offered sea kayaking as their primary business activity in 2005. In addition, more than one-third of businesses surveyed offered only sea kayaking in 2005. The majority of businesses offered sea kayaking tours as the primary service to sea kayakers, followed by sea kayak rentals.

The sea kayaking sector draws most of its clients from British Columbia and Alberta. Internationally, the sector draws clients from the United Kingdom, and Germany, Austria and Switzerland, which we grouped together for the purpose of this study. The clientele is almost evenly divided between males and females, with a slightly higher percentage of female clients. The majority of clients are between 35 and 54 years of age, and travel mainly as couples, families or individuals, rather than with group tours. Businesses reported that most of their sea kayaking clients stay between 2 and 5 nights in the local community and that over half of their clientele travelled to the community specifically to participate in sea kayaking activities. Over three quarters of all clients in 2005 were classified as tourists (for the purposes of this research, a tourist was defined as “someone who is not a resident of your community”).

The three largest categories of operating expenses for businesses in 2005 were labour, new facilities and/or equipment (capital costs), and transportation costs. Fourth was advertising and promotional activities, on which businesses spent an average of \$8,910 in 2005.

The four most commonly used marketing methods in 2005 were: respondents' own web site, brochures and/or posters, magazine ads, and other websites. Businesses reported that most of their bookings came from wholesale travel agents, repeat clients/guests, and by word of mouth.

The majority of businesses stated that too much government regulation was one of the most significant constraints to the long-term growth of their businesses; however, nearly half of businesses stated that so too was the lack of government enforcement of existing regulations. “Too much government regulation,” was specifically related to the amount the time and money required to obtain licenses, tenures and permits as well as frustrations with the overall system and lack of benefits from existing regulations.

More than three-quarters of all businesses felt that the long-term growth of their business was slightly to seriously constrained by the inability to “find staff with adequate training”. The ability to retain staff with adequate training was also seen as a slight to serious constraint by 60.6% of businesses.

A high percentage of businesses also felt that their long-term growth was constrained by high marketing costs, accessibility issues including the cost and timing of air and ground transportation, and general weather/seasonality.

Acknowledgements

This research would not have been successful without the support of the Sea Kayak Guides' Alliance of British Columbia executive and members, as well the businesses who willingly and freely supplied information regarding their operations. The Wilderness Tourism Association and the Council of Tourism Associations also provided support for this project. Thanks are also due to the Department of Recreation and Tourism Management at Malaspina University College for their assistance with this research, including students Rachel Huber, Jesse Crockett, and Les Campbell and professor Nicole Vaugeios. Caroline Fisher contributed to the project through her first-hand sea kayaking expertise and assistance with this report.

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1.0 INTRODUCTION

In 2005, 22.8 million tourists spent \$9.8 billion dollars in the province, many of whom participated in outdoor and wilderness activities, including adventure-based tourism activities. As one of the fastest growing segments of Canada's tourism industry, adventure tourism showcases British Columbia's stunning and distinct land and seascapes to people from around the world. Adventure-based tourism is defined as tourism that takes place in unusual, remote or wilderness areas, involves unconventional forms of transportation, and is associated with either high or low levels of physical activity and risk¹.

With more than 27,000 kilometres of intricate coastline, British Columbia is a world-class destination for sea kayaking. The combination of largely undeveloped and sheltered island groups, rich First Nations cultural heritage and abundant marine wildlife make the province an ideal location for ocean-based exploration. Since the province's first sea kayaking company was established in 1976, the sector has grown rapidly and is today regarded as a world leader in the quality of experience available.

This study, undertaken in 2006 by Tourism British Columbia (Tourism BC), in partnership with the Sea Kayak Guides' Alliance of British Columbia (SKGABC), sought to develop a more comprehensive understanding of the sea kayaking sector in British Columbia. Specifically, it was anticipated that this project would provide detailed information on the characteristics of the sector, such as the types of products and services being offered, where the products and services were being offered, the percentage of gross revenues attributable to clients participating in sea-kayaking related activities, the percentage of clients who were tourists, the average business' gross revenues from products and services related to his or her sea kayaking business, the number of clients and/or tourists being served, the constraints to growth that business owners experience, and a demographic profile of clients. Further, it was anticipated that this research would

¹ Nickerson, N.P., & Kerr, P. (2001). *Snapshots: An introduction to tourism*. Prentice Hall: Toronto.

provide information on the sector's overall gross revenues for 2005. Finally, it was expected that this research would provide valuable information for sea kayaking operators in British Columbia, and for SKGABC members.

The report is compiled as follows: Section 2 briefly outlines the methodology employed in this research (see Appendix A for more details regarding the methodology), while Section 3 provides a comprehensive analysis of the data. Section 4 presents a summary of the findings, recommendations for the sector and Section 5 discusses the limitations of the study.

2.0 METHODOLOGY

This report is based on a survey of sea kayaking businesses operating in British Columbia during the period of the survey and thus entailed defining and identifying the target population, designing an appropriate questionnaire, data collection, and data analysis.

Research Services, Tourism BC, worked in partnership with the SKGABC to develop a definition of the target population, to develop a database of sea kayaking businesses operating in British Columbia at the time of the data collection phase, and to design the questionnaire that was used for this project. Using the compiled database, businesses offering sea kayaking services and products in British Columbia were surveyed by means of a mail-back questionnaire in 2006.

2.1 Defining the target population

For the purposes of this research, the sea kayaking sector was defined as commercial sea kayak businesses offering services and products to clients engaging in ocean-based sea kayaking activities in the province of British Columbia. Such services and products included sea kayak tours (day trips and multi-day trips), kayak rentals, sea kayak instruction, and recreational and professional guide training. This study examined the provision of sea kayaking services and products in British Columbia, and consequently businesses providing only products (retail sales) were not included in this research.

2.2 Database development

The database compiled for this research contained two sub-populations: member businesses of the SKGABC and non-member businesses. The SKGABC executive provided a current 2005/2006 membership database. The non-member database was compiled from Research Services' existing database of sea kayaking businesses operating in British Columbia, and was updated with the assistance of the SKGABC executive and with various other techniques, including internet and yellow pages searches. As of March

2006, the database contained contact information for 114 companies offering sea kayaking services and products in the province of British Columbia.

2.3 Inventory of sea kayaking businesses operating in British Columbia

As of August 2006, 60 companies completed and returned the questionnaire and confirmed that they offer marine-based kayaking activities in British Columbia. The operating locations of the respondents have been assigned to one of the nine *Commercial Sea Kayaking Zone Boundaries* (see Figure 1). Note that some businesses operate in more than one zone.

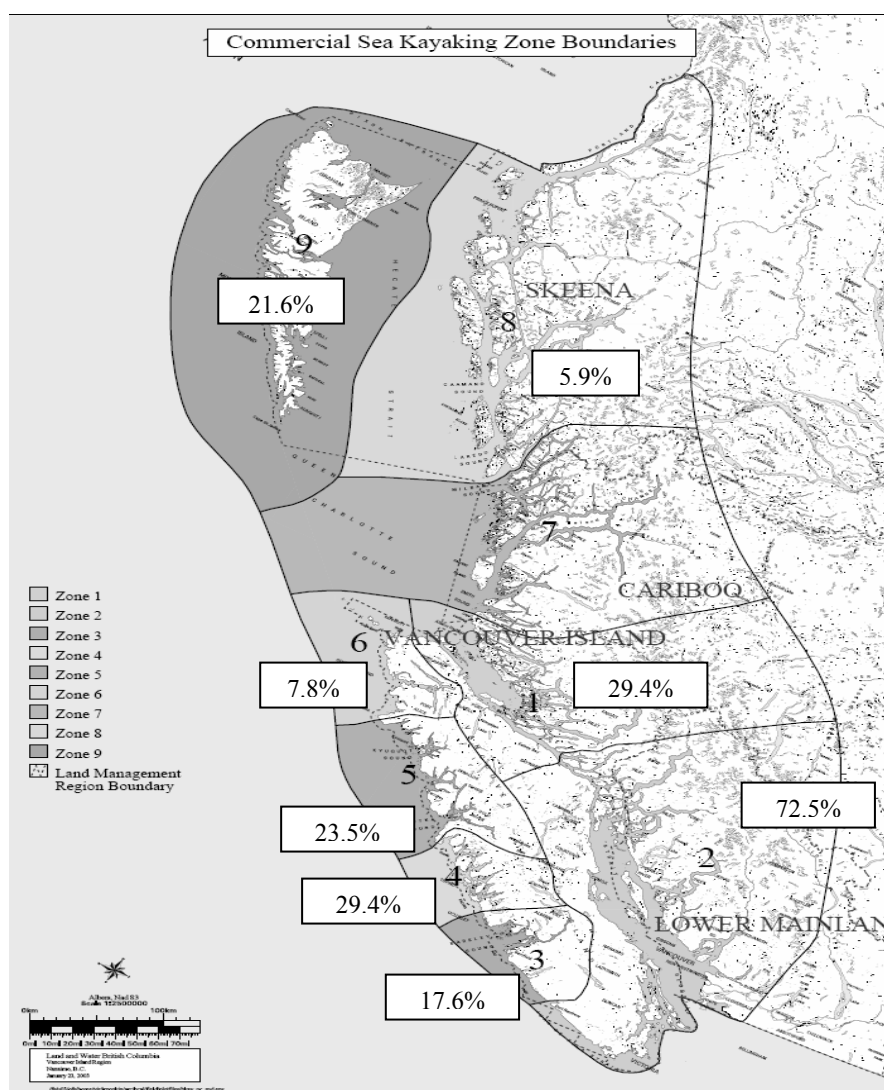


Figure 1: Percentage of responding businesses operating within the Commercial Sea Kayaking Zones

As highlighted in Figure 1, of the 60 companies, 15 (29.4%) operated in Zone 1, 37 (72.5%) operated in Zone 2, nine (17.6%) operated in Zone 3, 15 (29.4%) operated in Zone 4, 12 (23.5%) operated in Zone 5, four (7.8%) operated in Zone 6, five (9.8%) in Zone 7, three (5.9%) in Zone 8 and 11 (21.6%) in Zone 9. Overall, the vast majority of companies were operating either in the southern part of the province or the Queen Charlotte Islands. Few companies operate on north western Vancouver Island, or the North and Central Coasts where access and paddling conditions tend to be less conducive to commercial style kayaking trips.

2.4 Data collection

This study involved the use of two questionnaires: one for members of the SKGABC and one for non-members (Appendix B). The questionnaires were similar in design and content, except that the SKGABC member questionnaire contained an additional four questions specifically related to membership in the SKGABC (results from these four questions have not been included in this report). There were 60 completed surveys in total, and all have been summarized in this report.

2.5 Data analysis

The collected data from all completed surveys was entered and analysed using the computer software program known as Statistical Package for the Social Sciences (SPSS)². For the purpose of this report, the data were summarized for all businesses. The data was weighted based upon the known population of sea kayaking businesses operating in British Columbia (non-members = 73; members = 41) and the survey response rates (non-members = 37; members = 23). Since responses to some questions varied systematically between members and non-members, responses by each group were separately weighted upwards to represent either the population of members or non-members. The responses of members and non-members were then aggregated to represent the entire population. This report presents the aggregated results only.

² Data were not tested statistically for significance due to the small sample sizes. Differences of practical significance, defined as those exceeding 10.0% for the purposes of this report, are highlighted within the body of the report.

All reported percentages are valid percentages, unless otherwise stated³. It is important to recognize the possibility of response error in the reporting of percentages by respondents (to questions requiring a response in percentages), as the reported percentages are likely to represent approximations and best estimates as opposed to actual figures (see Section 5.0 Limitations). Finally, all dollar values reported are in Canadian dollars.

³ Valid percentages are determined by omitting non-responses to a question and then calculating percentages based on the total number of valid responses to the question.

3.0 RESULTS

3.1 Sector Characteristics

3.1.1 Type of Sea Kayaking Business and Years in Business

Respondents were asked to state whether their companies offered strictly sea kayaking services or whether they offered sea kayaking products and services (products were defined as retail sales and services were defined as kayak rentals, guided tours, training courses, and lessons). Overall, 51.5% of businesses reported that they offered services only, while 48.5% of businesses reported that they offered both products and services, (Figure 2).

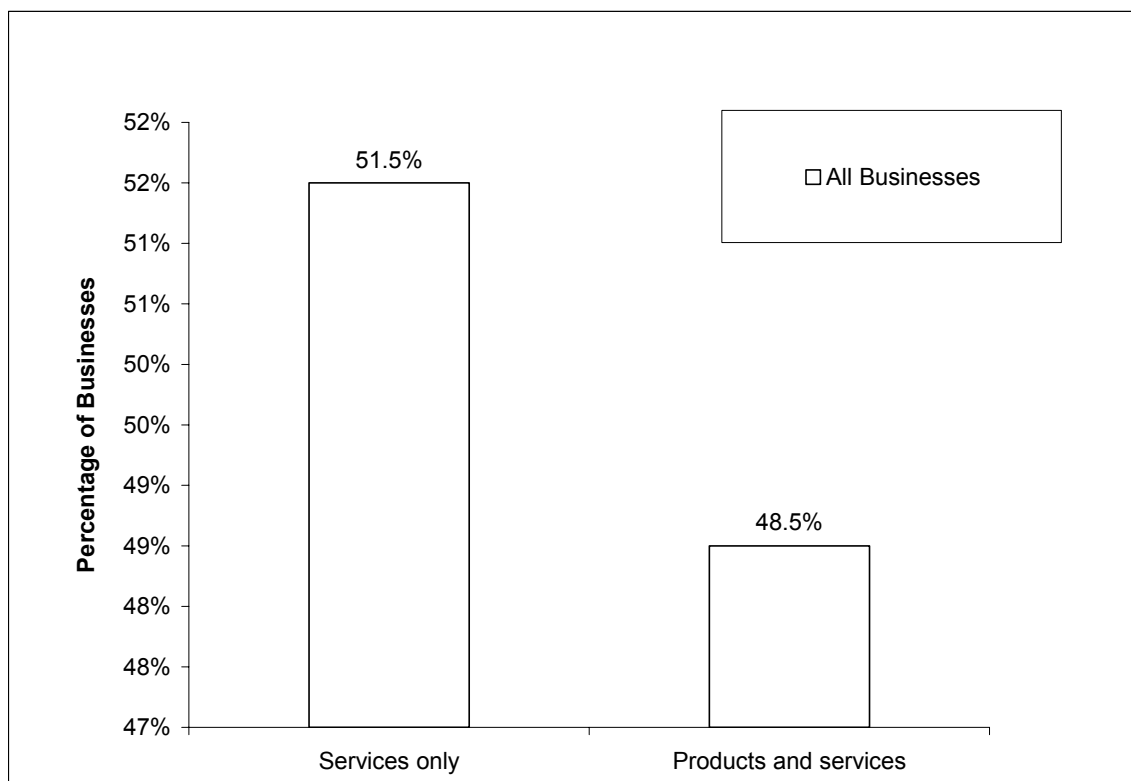


Figure 2. Percentage of businesses offering services only or products and services

Respondents indicated that, on average, they had been providing products or services to clients for 11.5 years. (Figure 3). More than one-quarter (27.5%) of businesses had been in business for less than 5 years.

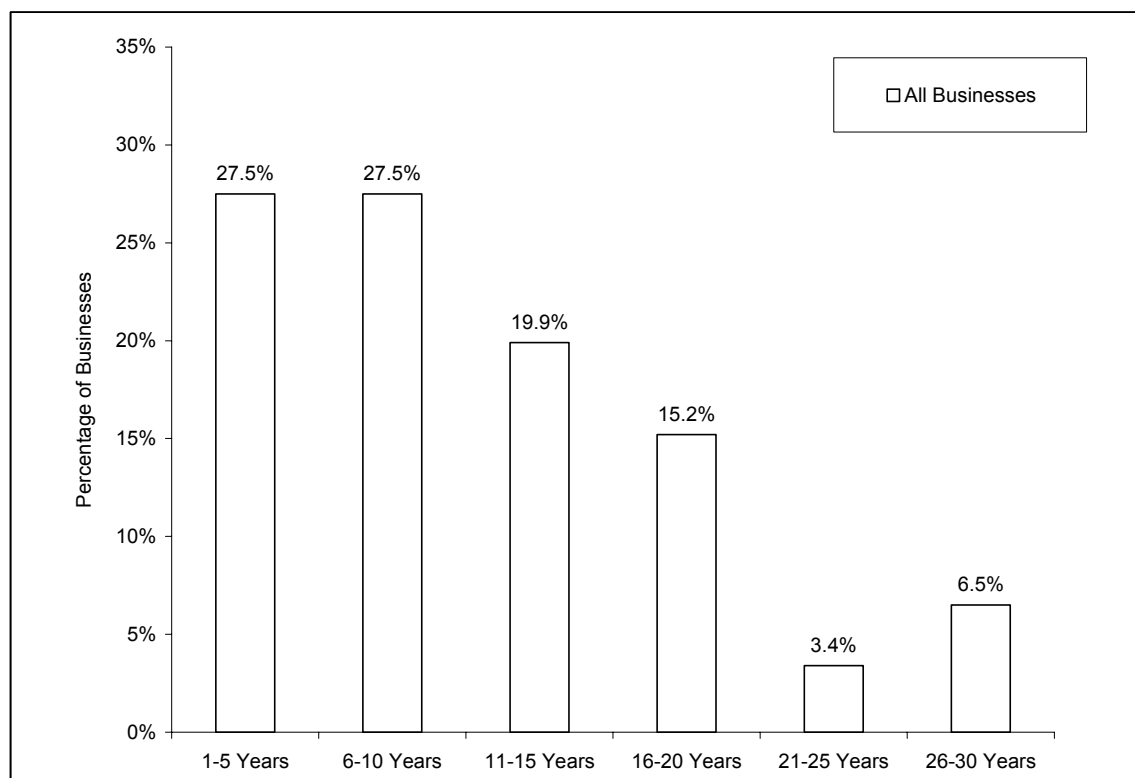


Figure 3. Number of years in business for all businesses

3.1.2 Primary Business Activities

Respondents were asked to indicate the primary activities offered by their businesses in 2005 as well as any additional services their businesses offered. Table 1 highlights that 63.5% of all businesses offered sea kayaking as their primary activity in 2005. A number of businesses indicated that they offered other primary activities not listed in the survey; these included sail charters/mothership trips, white water kayaking, outdoor education programs and marine resource monitoring, among others⁴.

⁴ Mothership trips are boat-based trips. Kayaks, equipment, and food etc. are carried on board the “mothership,” which then travels throughout an area during the course of a trip. Participants leave the mothership for day-excursions and return to the mothership for meals and accommodation.

Table 1. Primary business activity offered in 2005

Primary Activities (2005)*	All Businesses
Sea kayaking	63.5%
Accommodation	10.4%
Whale watching	3.5%
White-water rafting	1.8%
Sport or guided fishing	1.8%
Hiking	1.8%
Cultural tours	1.8%
Scuba Diving	1.8%
Other water-based wildlife viewing	1.6%
Surfing	0.0%
Other	12.2%

* Primary activity was defined as the highest revenue generating activity during 2005.

3.1.3 Additional Business Activities

In a separate question, respondents were asked to indicate any other activities or adventure sports their businesses offered in 2005, (Table 2). More than one third of all businesses (34.7%) indicated that they offered only sea kayaking.

Almost half (43.8%) of businesses also indicated that they offered other activities not listed in the survey. These included camping, canoeing, grizzly bear viewing, kayak rentals, leadership training, outdoor education, sailing and guide training programs, among others.

Table 2. Additional business activities offered in 2005.

Other Activities (2005)	All Businesses
Only sea kayaking	34.7%
Hiking	32.1%
Accommodation	31.8%
Other water-based wildlife viewing	30.7%
Whale watching	27.0%
Cultural tours	26.6%
Sport or guided fishing	18.1%
Birding	16.1%
White-water rafting	7.1%
Surfing	6.8%
Scuba Diving	5.5%
Golfing	3.6%
Other	43.8%

3.1.4 Primary Services offered to Sea Kayakers

Businesses were also asked about the primary and secondary services they offered to sea kayakers in 2005 (see Table 3). Over half (54.1%) of all businesses offered sea kayaking tours as a primary service to sea kayakers, and just over one quarter (25.7%) offered kayak rentals, (Table 3). A small number of all businesses (6.9%) responded that they offered other primary services to sea kayakers, such as multi-day mothership tours and kayak instruction.

Table 3. Primary services offered to sea kayakers in 2005

Primary services	All Businesses
Sea kayak tours (day trips and multi-day trips)	54.1%
Kayak rentals	25.7%
Sea kayaking instruction	8.3%
Recreational training (non-professional)	1.8%
Guide training (professional)	3.2%
Other	6.9%

3.1.5 Secondary Services offered to Sea Kayakers

Table 4 indicates that of the secondary services offered to sea kayakers, 20.6% of all businesses offered sea kayaking tours, while an equal number of businesses (20.6%) did not offer secondary services to kayakers.

Table 4. Secondary services offered to sea kayakers in 2005

Secondary services	All Businesses
Sea kayak tours (day trips & multi-day trips)	20.6%
Kayak rentals	29.4%
Sea kayaking instruction	5.4%
Recreational training (non-professional)	6.8%
Guide training (professional)	5.0%
Other	12.0%
None	20.6%

Over one quarter of businesses (29.4%) offered kayak rentals as a secondary service. A small number of all businesses (12.0%) responded that they offered other secondary services to sea kayakers that were not listed, for example accommodation, cultural tours, bear viewing and water/land taxi services.

3.1.6 Staffing

Respondents were asked to indicate the number of full-time and the number of part-time staff in each month of 2005. Full-time staff was defined as employees who worked 30 or more hours per week in 2005, while part-time staff was defined as those employees who worked less than 30 hours per week in 2005. As expected, analysis of staffing levels shows clear seasonality, with the months of May, June, July, August, and September showing the highest staffing levels (full time and part time) for all businesses. Businesses employ, on average, 3.2 full-time staff throughout the year, increasing staffing to an average of 5.7 full-timers through the summer months.

On average, businesses employ 1.6 part-time staff year round, and 2.8 part-time staff during the summer months.

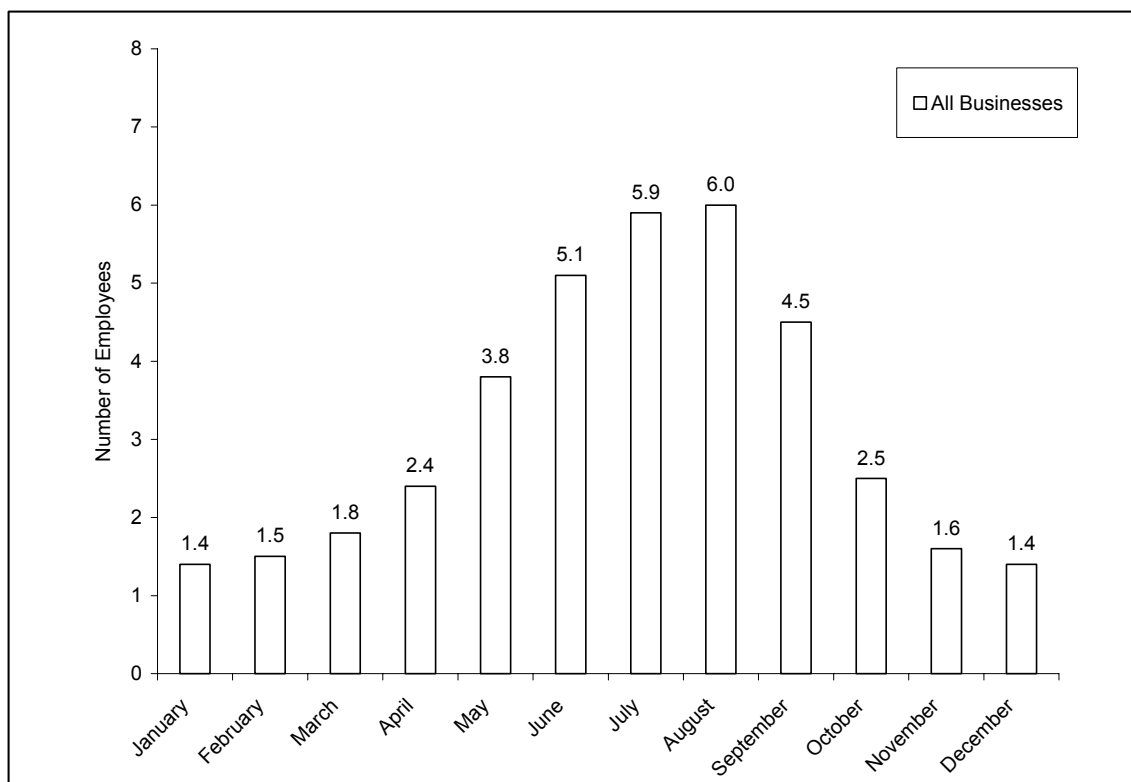


Figure 4. Full-time staffing levels for all businesses 2005

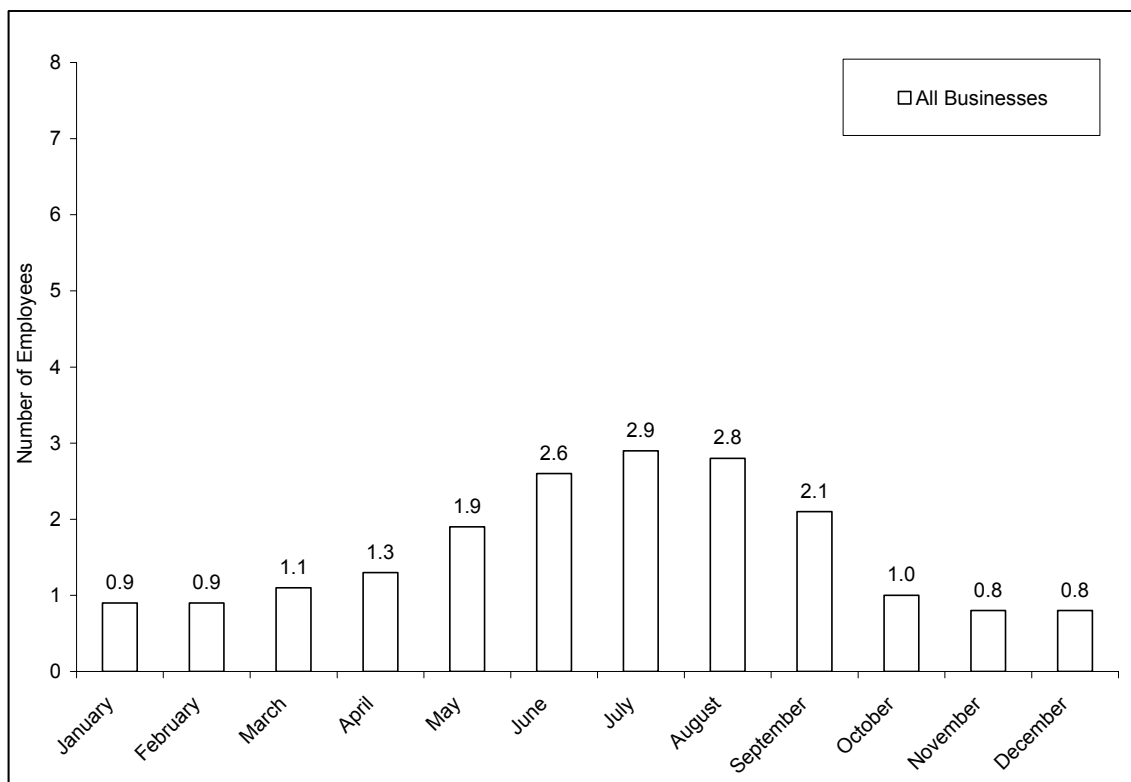


Figure 5. Part-time staffing levels for all businesses 2005

3.1.7 Number of Clients

Respondents were asked to estimate the number of their clients who participated in sea kayaking activities in 2005. Respondents were requested to exclude from the estimate those clients who had only purchased retail products. The average number of clients for all businesses in 2005 was 634, while the total number of clients for all businesses was 69,459 in 2005.

Figure 9 illustrates that close to three quarters of all businesses (69.0%) had 500 clients or less. Nearly one-third of all businesses (31.0%) had more than 500 clients. A small percentage of businesses (5.3%) had over 2,000 clients.

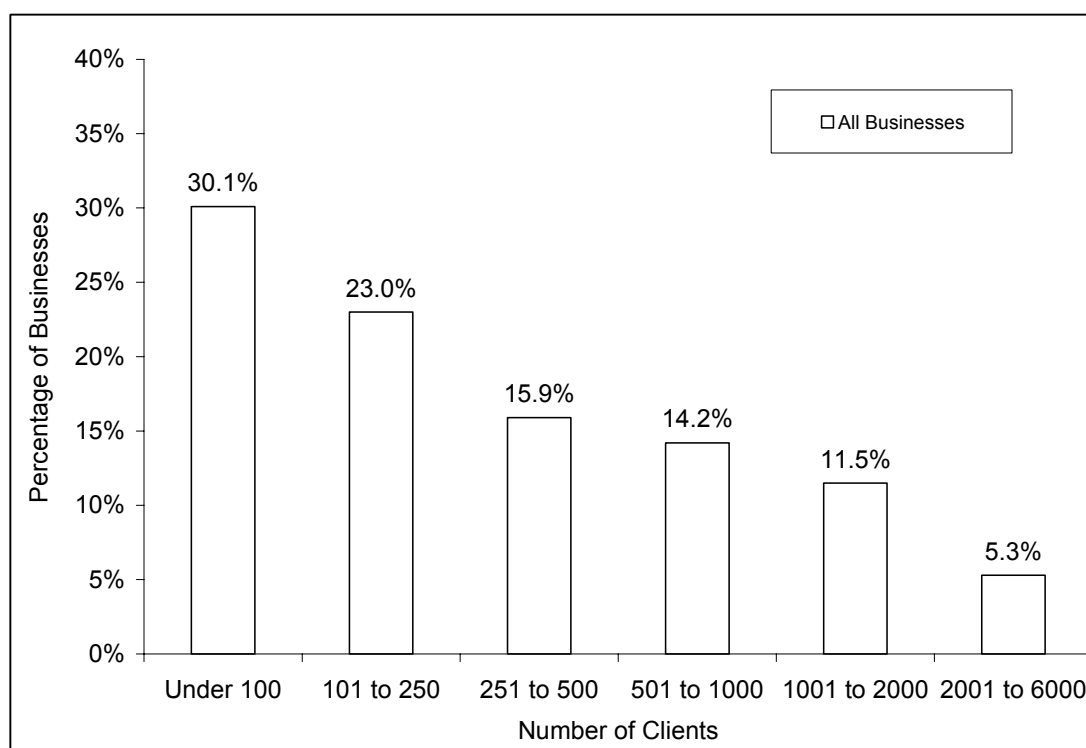


Figure 6. Number of clients for all businesses in 2005

3.1.8 Comparison of 2005 Client Volume over 2004 Client Volume

Respondents were asked to compare the volume of clients in 2005 to 2004 by indicating if their client volume had increased, decreased or stayed the same. Respondents were also requested to indicate by what percentage their volume had increased or decreased.

Overall, 44.7% of businesses reported that volume had increased (Figure 7) by an average percentage of 12.6%, (Figure 8). Overall, 39.9% of businesses reported that volume had stayed the same in 2005.

Fewer companies reported a decline in business volume (18.7%), indicating an overall decline in volume of 6.4%.

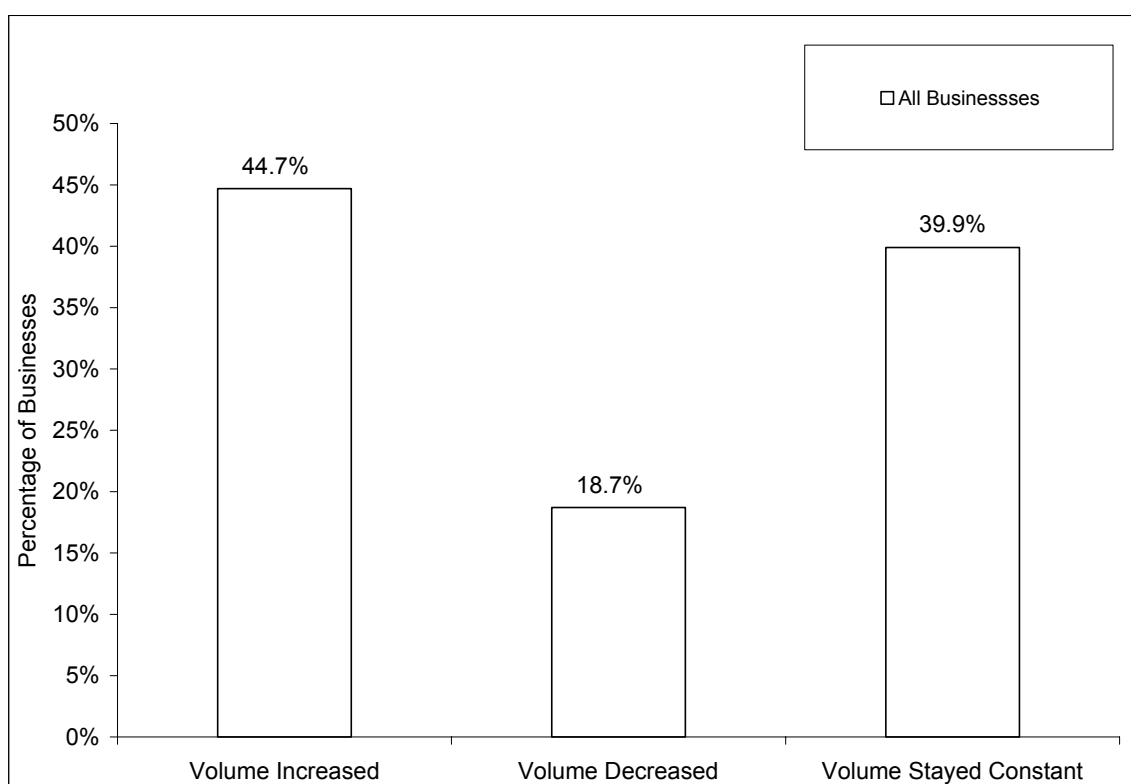


Figure 7. Percentage of business volume change in 2005

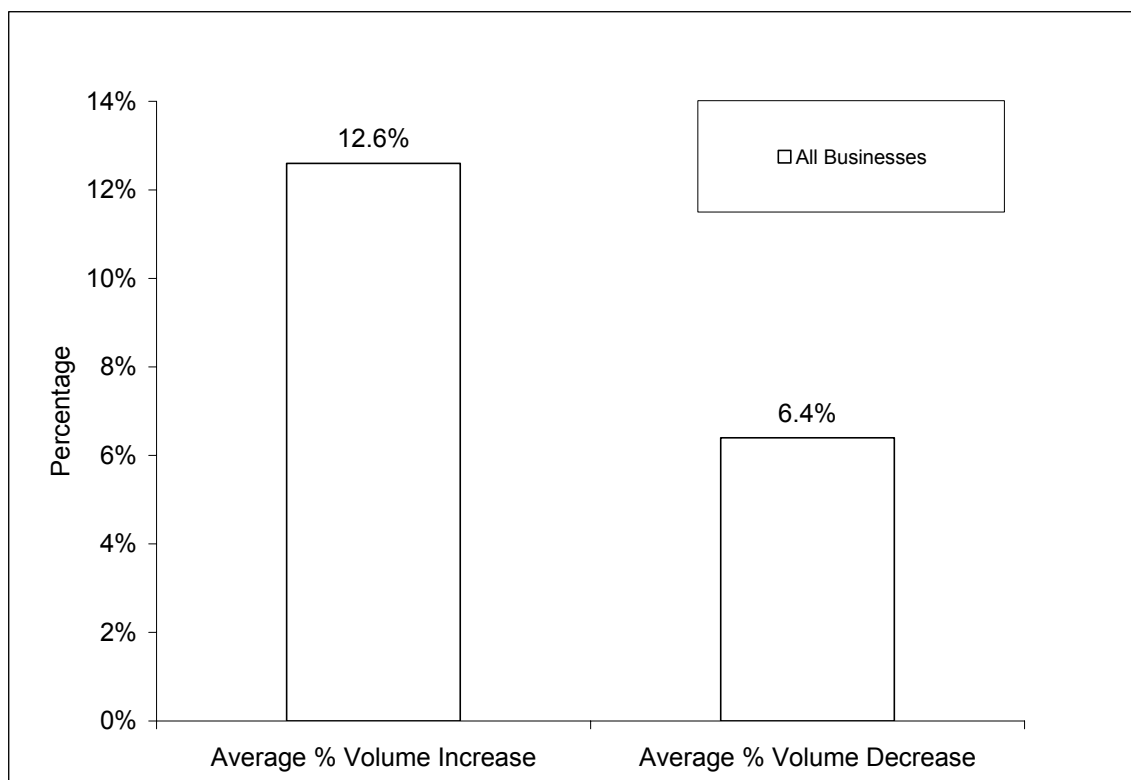


Figure 8. Average percentage increase or decrease in client volume 2005 over 2004

Despite inclement weather early in the 2005 season, the majority of businesses reported a volume increase in 2005. Overall, more than twice as many companies reported a business volume increase, than decrease, and the average reported percentage of volume increase was almost double the average reported percentage of volume decrease.

3.1.9 2005 Gross Revenues from Sea Kayaking Products and Services

Respondents were requested to estimate the percentage of their 2005 gross revenue that was attributable to clients who participated in sea kayaking activities (defined as revenue from guided tours, courses, lessons, and rentals). Overall, businesses reported that 55.7% of their 2005 gross revenue was attributable to clients who participated in sea kayaking activities.

Information was also collected on respondents' gross revenue from sea kayaking products and services in 2005 (see Figure 9). Respondents were presented with a choice of one of eight gross revenue ranges. More than half of all businesses (58.2%) reported that their company's total 2005 gross revenue was between zero and \$100,000. Slightly

more than one quarter of businesses (28.2%) reported gross revenues between \$100,001 and \$250,000. Almost 13.7% of all businesses reported revenues in the \$250,001 to more than \$400,000 category (Figure 9).

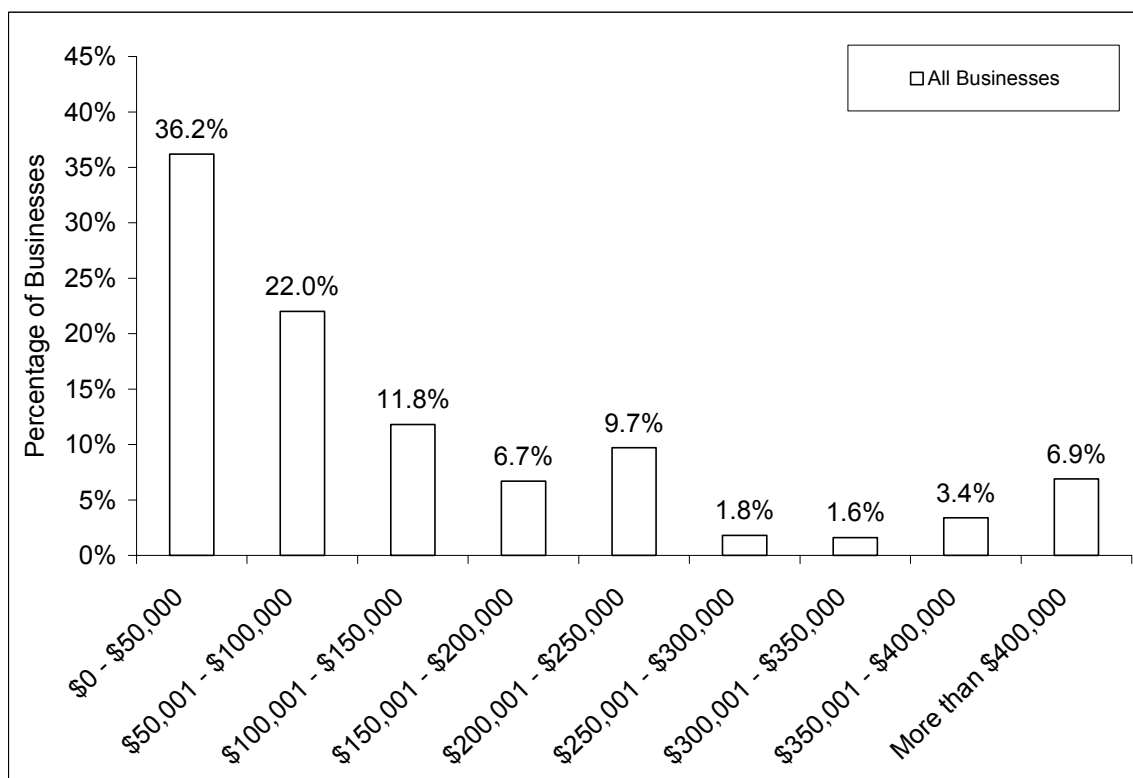


Figure 9. Gross revenue related to sea kayaking products and services for all businesses

In order to determine the average gross revenue earned by sea kayaking businesses operating in British Columbia in 2005, the midpoint for each of the nine revenue ranges was used (see Figures 9). Because the category “more than \$400,000” does not have a midpoint, a conservative value of \$425,000 was assigned as the midpoint to this revenue range. Overall, the average business offering sea kayaking in British Columbia in 2005 had an estimated gross revenue of \$125,705 from the sale of sea kayaking products and services. Once revenues are added across the sector, the total 2005 gross revenues of the sea kayaking sector operating in British Columbia can be estimated at \$14,255,000, (Table 5).

As previously highlighted, many businesses reported that a percentage of their 2005 gross revenue was attributable to clients who had participated in sea kayaking activities.

Businesses frequently offer additional products and services such as accommodation or activities such as whale watching, wildlife viewing, or cultural tours. Therefore, in order to calculate this extra gross revenue, each business' 2005 gross revenue from sea kayaking products and services was factored up to take into account revenue attributable to additional activities. For example, if a business reported that its 2005 gross revenue attributable to sea kayaking products and services was \$75,000, but also stated that 80% of the company's 2005 gross revenue was related to clients participating in sea kayaking-related activities, then this business was estimated to have additional revenue of \$18,750 ($\$75,000 \times [(1.0/0.80) - 1] = \$75,000 \times 0.25 = \$18,750$). If a business reported that 100% of its 2005 gross revenue came from clients participating in sea kayaking-related activities, they were excluded from this calculation.

Once a figure had been determined for each business reporting additional gross revenue these figures were summed. As shown in Table 5, in 2005 all businesses had further gross revenue of approximately \$41,723,678 from additional activities. When including all products and services, the sea kayaking sector had gross revenues of \$55,978,678 in 2005. (Table 5).

Table 5. 2005 Sea kayaking sector gross revenue estimate breakdown

	2005 Gross Revenues
Average 2005 gross revenue from products and services related to sea kayaking business	\$125,705
Total 2005 gross revenue of sea kayaking sector operating in British Columbia related to sea kayaking business.	\$14,255,000
2005 gross revenue from additional activities	\$41,723,678
Estimate of total 2005 sector gross revenue	\$55,978,678
Estimate of 2005 sector gross revenue attributable to tourists participating in sea kayaking activities	\$11,277,700

In order to determine the total 2005 gross revenue attributable to tourists participating in sea kayaking activities, each business' gross revenue from products and services related to sea kayaking was multiplied by the business' stated percentage of clients who were

tourists (defined as “someone who is not a resident of your community”). Consequently, in 2005, the gross revenue attributable to tourists participating in sea kayaking activities in British Columbia was \$11,277,700 for all businesses (Table 5).

3.1.10 Operating Expenses

A number of questions were asked about businesses’ operating expenses. Businesses were asked to estimate what percentage of their 2005 operating expenses was allocated to each of fourteen expense categories, including administration, transportation and labour expenses. Figure 10 illustrates that the three highest expense categories were labour (including payroll, taxes and benefits), new facilities and/or equipment (capital costs) and transportation (including fuel).

Overall, businesses spent 28.9% of their operating budget on labour. Approximately 12.7% of businesses’ operating budget was allocated to capital costs (new facilities and/or new equipment, and 8.5% to transportation costs, including fuel. Three of the categories in Figure 10 (related to equipment purchasing and repairs, and permits) are discussed further in Sections 3.1.11 and 3.1.12.

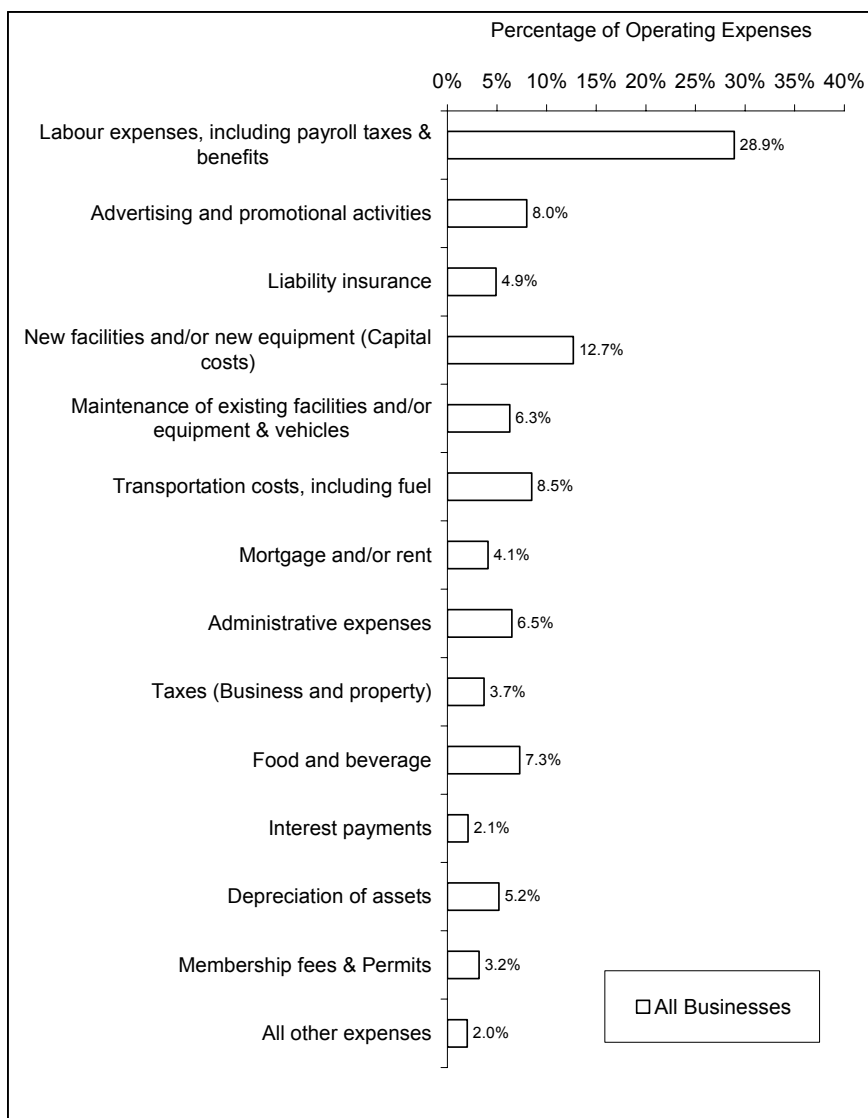


Figure 10. Average percentage of 2005 operating expenses for all businesses

3.1.11 Expenditures for Purchase and Repair of Kayaks and other Equipment

Businesses were also asked to indicate how much they spent on the purchase and or repair of sea kayaks for the combined years of 2003, 2004 and 2005. Respondents had a choice of nine spending ranges. On average, businesses spent a total of \$21,689 on sea kayak purchases and repairs during this three year period.

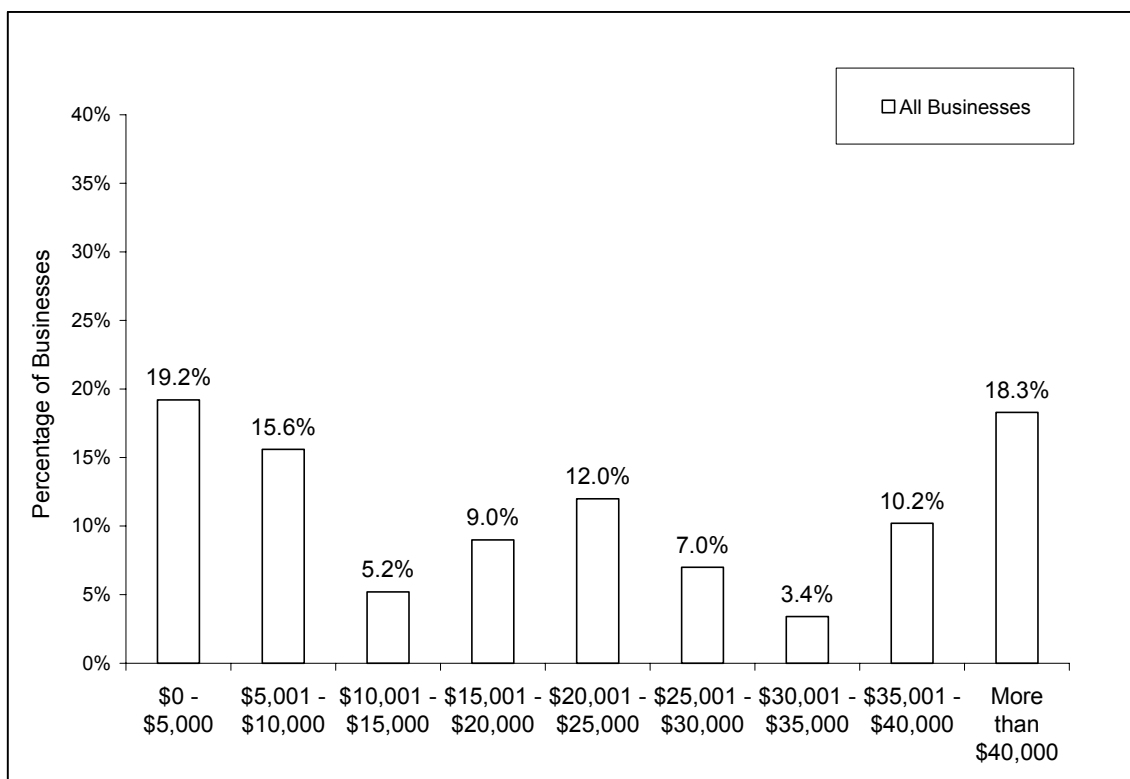


Figure 11. All businesses' expenditures for sea kayak purchase and repairs 2003-2005

As illustrated in Figure 11, 18.3% of all businesses spent more than \$40,000 on the purchase and repair of kayaks between 2003 and 2005.

Respondents were also asked to estimate their 2005 expenses for other, non sea kayak equipment such as vehicles, trailers, gear and office equipment. Again, businesses were requested to select one response from a list of nine expense categories (see Figure 12). The average amount spent by businesses on non-kayak equipment was \$17,004. Almost half of businesses, 47.9% spent \$10,000 or less on other equipment. On the other hand, 19.0% of businesses spent more than \$40,000 on the purchase and repair of non-kayak equipment.

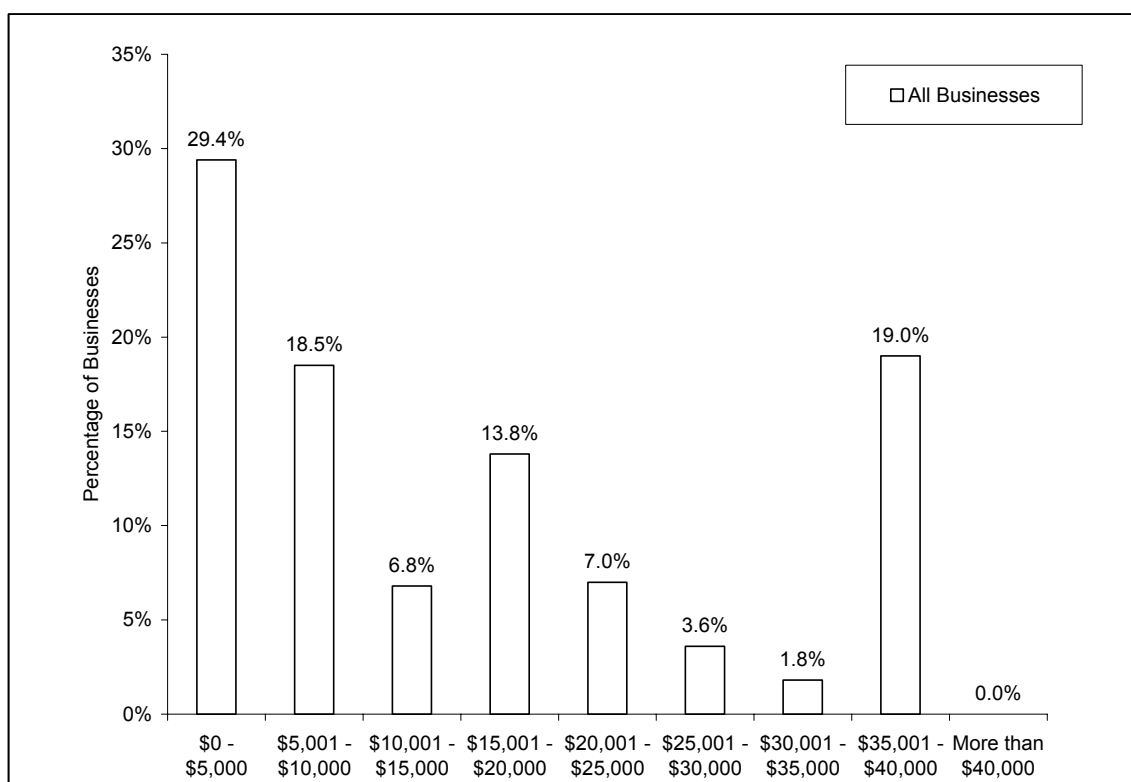


Figure 12. All businesses' expenditures on purchase and repair of non-kayak equipment (vehicles, trailers, gear, etc.)

3.1.12 Parks Permits and Crown Land Tenures

Respondents were requested to approximate the total cost to their business, in 2005, of obtaining permits (including all Crown land tenures, and Provincial and National Parks' permits). Businesses were required to choose one of six cost ranges. The majority of businesses (56.3%) spent \$1,000 or less on permits and tenures in 2005.

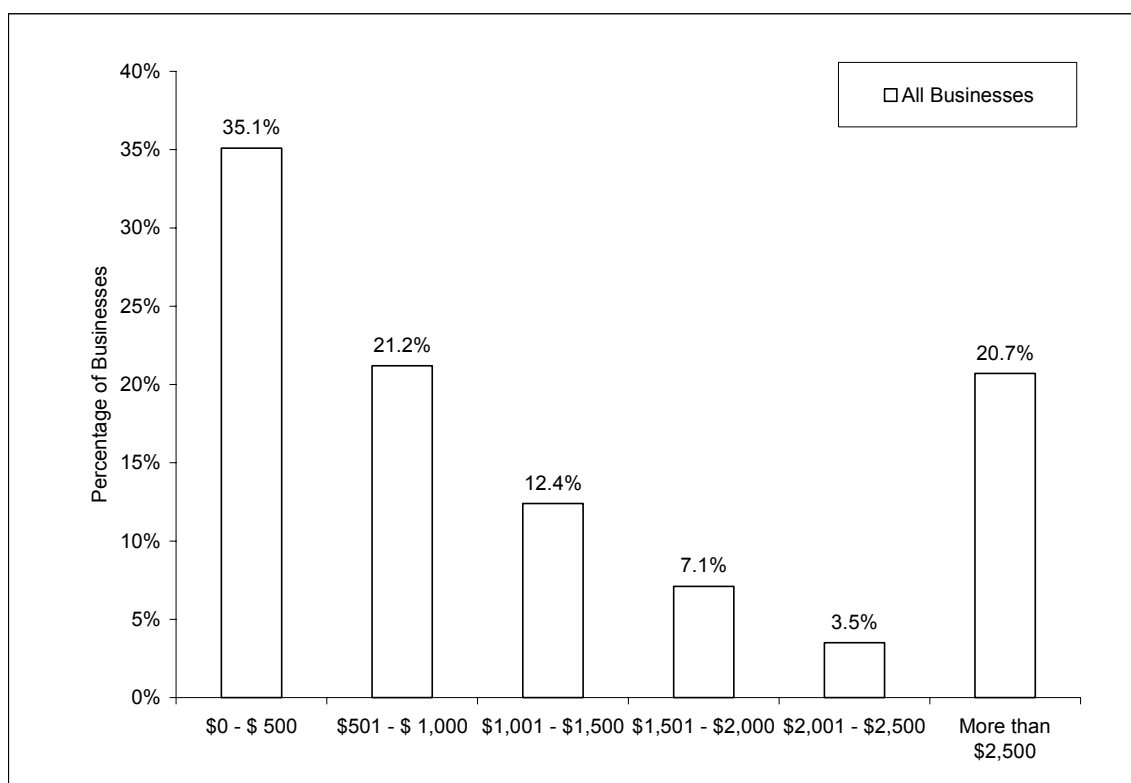


Figure 13. All businesses' spending on permits, Crown land tenures, Provincial & National Park Permits

3.2 Client and/or tourist characteristics

3.2.1 Client Gender

Respondents were requested to indicate the gender distribution of their clientele. Table 6 shows that in 2005 sea kayaking clientele for all businesses, had a slightly higher proportion of females than males (females = 53.0%; males = 47.0%).

Table 6. Gender of Clientele

	All Businesses
% of clients who were female	53.0%
% of clients who were male	47.0%

3.2.2 Client Age

Respondents were also requested to indicate the percentage of their clientele who fell within each of eight age categories (Table 7). Overall, respondents reported that nearly half (43.2%) of their clientele fell between the ages of 35 to 54 years of age. The 25 to 34 age category accounted for 14.6% of all business clientele, while 13.1% of clients fell between the ages of 55 to 64 years of age. Businesses reported that a small percentage of their clientele (4.2%) was 65 years or older (Table 7).

Table 7. Age Categories of Clientele

Percentage of Clientele	All Businesses
17 years or younger	9.8%
18 - 24 years of age	11.4%
25 - 34 years of age	14.6%
35 - 44 years of age	19.6%
45 - 54 years of age	23.6%
55 - 64 years of age	13.1%
65 - 74 years of age	3.6%
75 years and over	0.6%

Respondents were also asked whether or not the age makeup of their sea kayaking clients had changed in the last 10 years and if so, how it had changed. Overall, the majority (72.0%) of respondents indicated that the age make up of their clients had not changed in the last 10 years (Figure 14).

Of the respondents who described how their clientele had changed, many stated that their clientele was getting older, often by an average of five years. One business stated that his or her clientele was “moving from 35 to 55 to 40 to 60 year olds” who can “better afford both the time and money.” Another recurrent comment was that businesses were seeing more families with children both “15 years and less” as well as older kayakers who are returning with their adult children ages 18 to 44. It appears that as the baby boom generation ages, many are both starting and continuing to participate in kayaking, and may, in fact, be introducing their children and grandchildren to the activity, as well.

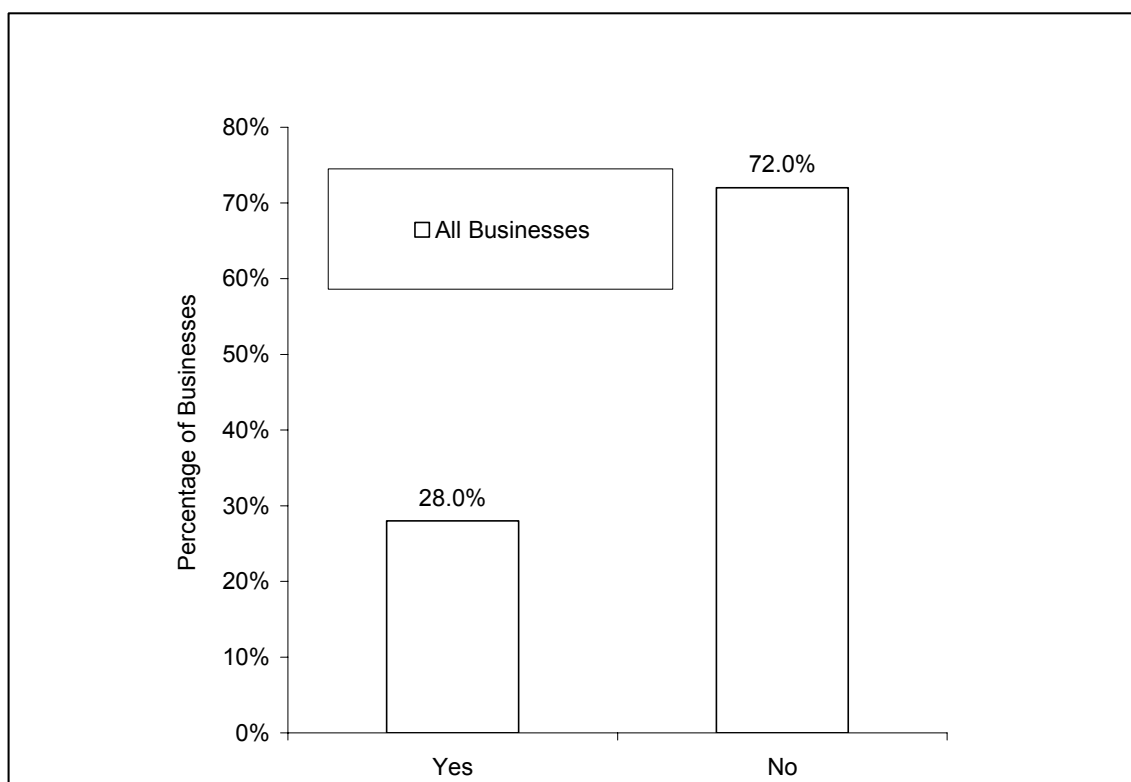


Figure 14. Has the age distribution of clients changed in the last 10 years?

3.2.3 Travel Party

Respondents were requested to think about the size of the group their clients travelled with in 2005 and to indicate the approximate percentage of clients who fell within the travel groups of individual, couples, families, friends, tour group and other. Figure 15 illustrates that respondents reported that 18.6% of their sea kayaking clients were traveling as individuals, 30.1% were travelling as a couple, 19.6% were traveling as a family, 17.0% were travelling with friends, and 9.2% were travelling as part of a tour group. A small percentage of respondents (2.1%) indicated “other,” which included school and or educational programs.

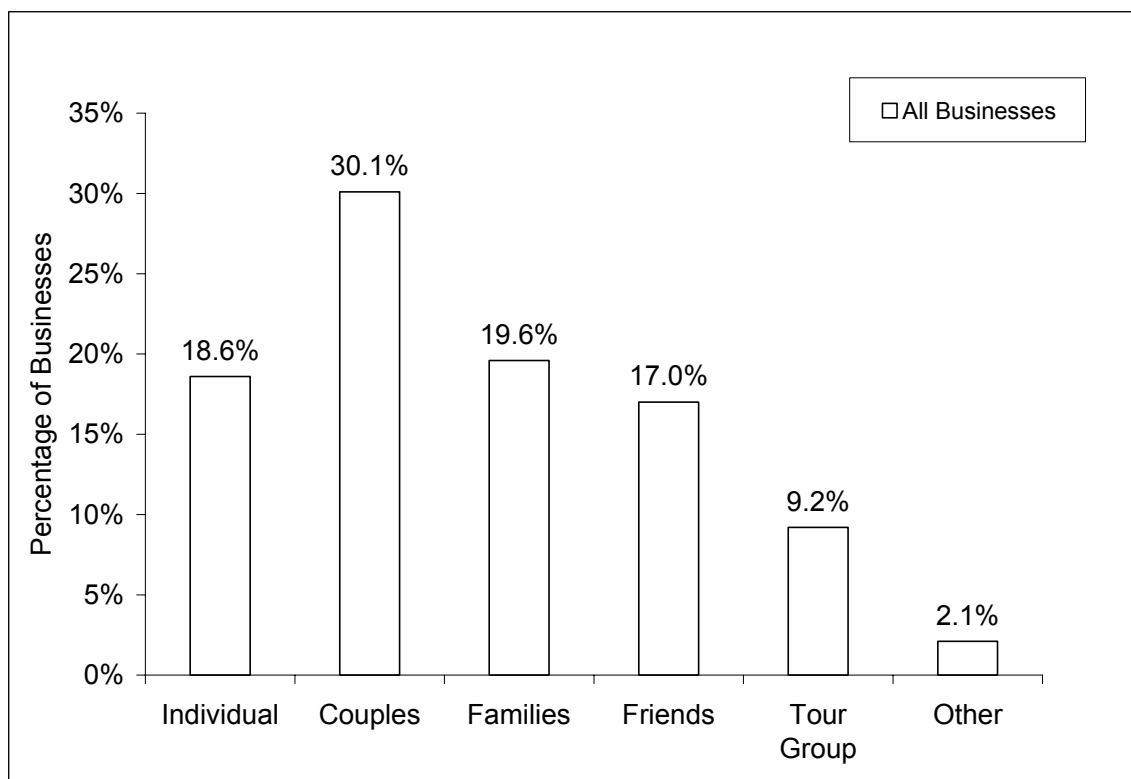


Figure 15. Travel party composition for all businesses

3.2.4 Client Origin

Respondents were asked to indicate the geographic markets of origin of their 2005 tourist clients. For the purposes of this project, a tourist was defined as “someone who is not a resident of your community.” As shown in Table 8, respondents indicated that in 2005 over one third (34.9%) of their tourist clients came from within British Columbia, followed by Alberta (11.9%), the North Western United States (9.7%), California (5.5%) and the United Kingdom (5.0%).

Table 8. Client Origin

Client Origin – Percentage	All Businesses
BC	34.9%
Alberta	11.9%
Ontario	6.1%
Other Canada	4.0%
Total Canada	56.9%
North Western US*	9.7%
North Eastern US**	3.8%
California	5.5%
Other US	4.2%
Total U.S.	23.2%
United Kingdom	5.0%
Germany/Austria/ Switzerland	4.4%
Other Europe	2.5%
Asia	1.6%
Other ***	2.4%
Total Overseas	15.9%

* Washington, Oregon, Idaho, Montana, Alaska

** New England States, New York

*** Other defined as Australia and Japan

3.2.5 Nights in the Community

Data was collected from respondents on the approximate number of nights their sea kayaking clients had spent within their community. Respondents were asked to assign a percentage of their clientele to each of five time categories (same day, one night, two nights, three to five nights, and six plus nights). Respondents were advised to count nights before, during, and after their clients' kayak-related trip, to the best of their ability. Figure 16 illustrates that in 2005 slightly more than one quarter (26.9%) of clients were staying two nights in the local community, 28.5% stayed three to five nights, and 15.2% stayed six nights or more. Overall, 70.6% of clients stayed at least two nights in the local community.

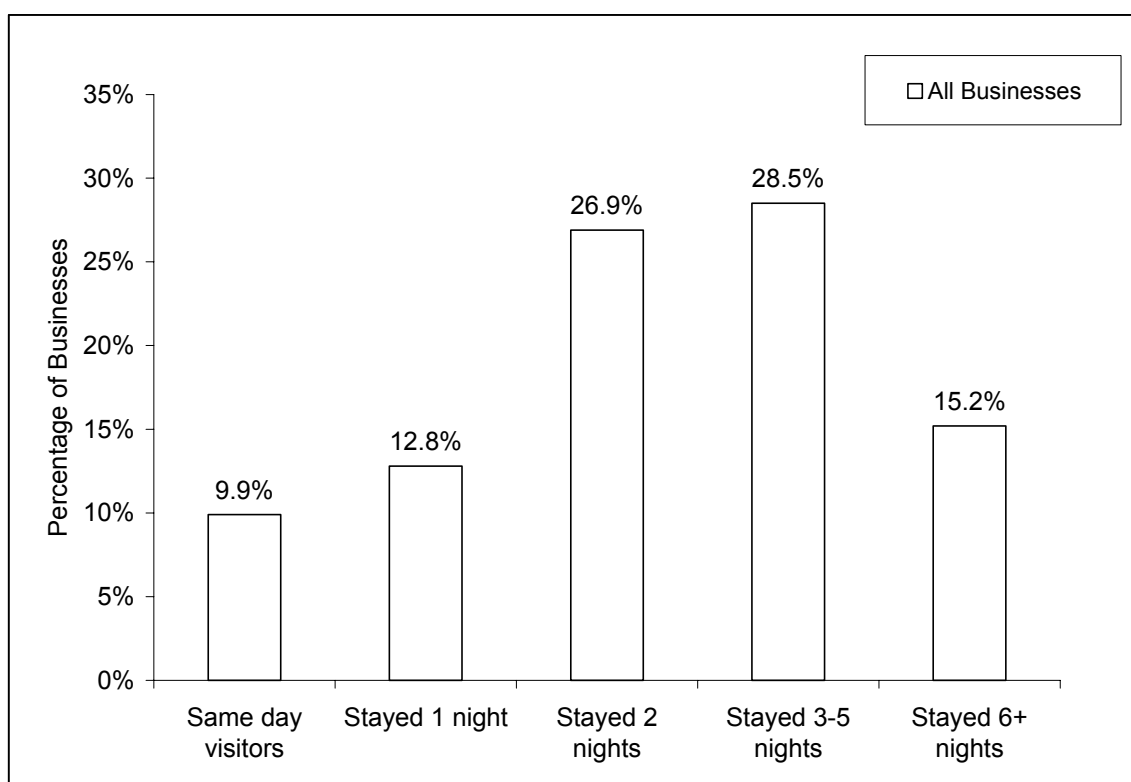


Figure 16. Average number of client nights in the community for all businesses

3.2.6 Tourist Clients, Main Reason for Travel, and Repeat Clients

Respondents were asked to approximate the percentage of their clients who participated in sea kayaking activities and who were tourists (defined as someone who was not a

resident of the community that the business was located within). Overall, businesses reported that over three quarters (76.4%) of their clientele were tourists.

Respondents were also requested to estimate for what percentage of their 2005 tourist clients sea kayaking activities were the main reason for travel to the community where the business operated. All businesses indicated that over half (56.5%) of their tourist clients had travelled to the community for the main purpose of participating in sea kayaking activities.

Overall, approximately 70% of clients stayed at least two nights in the community, over three quarters of clients were classified as tourists, and over half of these tourists visited the communities where the businesses operated specifically for the purpose of kayaking. Consequently, sea kayaking clients have had a considerable financial impact on the local communities where sea kayaking businesses were operating in 2005.

3.3 Marketing

Several questions in the survey pertained to respondents' marketing and advertising, including questions about the marketing methods used, percentage of bookings and or sales from various advertising sources, and the dollar value of marketing and advertising in 2005.

3.3.1 Marketing Methods

Respondents were requested to indicate all of the marketing methods they utilized in 2005, from a list of 18 methods (see Table 9). All of the survey respondents indicated that they had employed at least one method of marketing in 2005.

The four most commonly used marketing methods in 2005 were respondents' own web site 92.8% brochures and or posters 78.4%, magazine ads 60.9% and other website 54.3% (Table 9). Respondents had the opportunity to describe other marketing methods employed in 2005 that were not specifically listed. Two respondents indicated that they sponsored an event such as a race, while other respondents indicated that they advertised

through destination marketing organizations (DMO), by fax, and through give-aways or auctions.

Table 9. Marketing methods utilized in 2005

Marketing Method	All Businesses
Your web site	92.8%
Brochures, posters	78.4%
Magazine ads	60.9%
Other web site	54.3%
Provincial/regional travel guides	44.0%
Consumer or trade shows	38.0%
Newspaper ads	37.8%
Yellow pages	34.0%
Direct mail to past customers	30.4%
Public relations	29.2%
E-mail promotions	28.7%
Travel agents	25.4%
Wholesale operations	23.5%
Travel agency travel guides	20.1%
Direct mail to future prospects	19.9%
Film shows, slide shows	19.9%
Radio or television ads	11.0%
Other	9.1%

3.3.2 Source of Bookings and Sales

From a list of seven choices, businesses were asked to estimate what percentage of their total bookings and or sales related to sea kayaking had come from specific sources such as internet, travel agents, and word of mouth. Figure 17 illustrates that wholesale travel agents (24.0%), repeat guests (22.9%) and word of mouth (19.6%) were the three most common sources of bookings for all businesses.

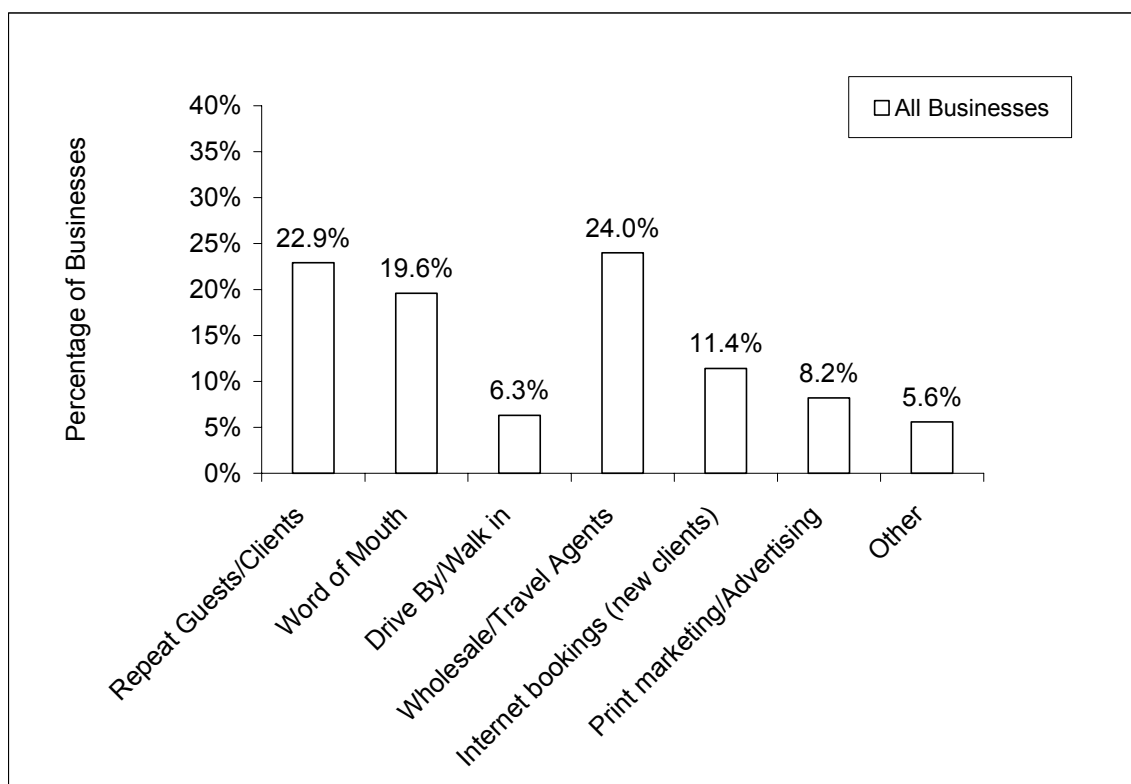


Figure 17. Source of bookings/sales for all businesses

Businesses were able to indicate if there were any other sources of bookings not listed in the survey. Responses included group bookings through another kayak company, referrals from local businesses, and cruises.

3.3.3 Expenditures for Marketing and Advertising Efforts

The last marketing question in the survey asked respondents to indicate how much their businesses had spent on marketing and advertising in 2005. Respondents were offered a choice of one of seven categories. As Figure 18 indicates, responses to questions revealed a fairly even distribution across categories, although a slightly higher percentage of all businesses indicated they spent between \$1,101 and \$2,500. Overall, 34.0% of all businesses spent between \$2,501 and \$10,000 on marketing and advertising, while 23.7% spent between \$10,001 and \$20,000. Overall, businesses spent an average of \$8,910 on marketing and advertising efforts in 2005.

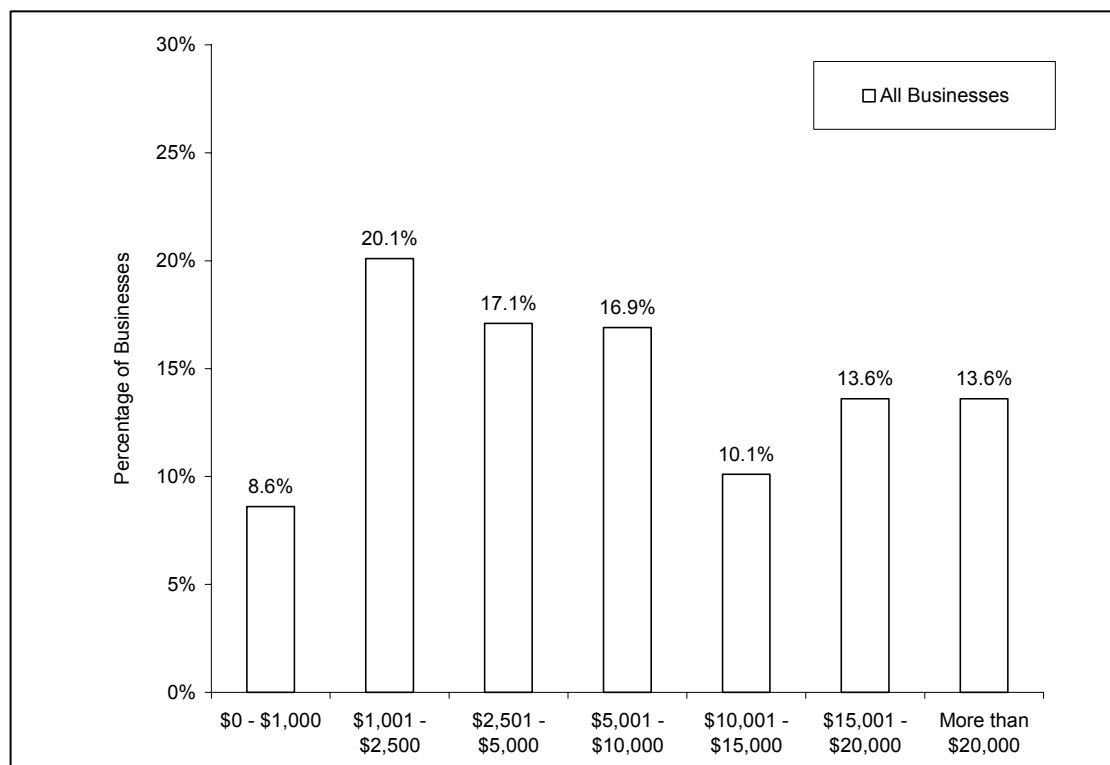


Figure 18. Average amount spent on marketing and advertising for all businesses

3.4 Constraints to Growth

The first question in this section of the survey asked respondents to consider the long-term growth of their business and to then rate each constraint, in a list of constraints, as being “not applicable,” “not a constraint,” a “slight constraint,” a “moderate constraint,” or a “serious constraint.” The constraints were divided into five general categories: transportation, business growth, government regulations, human resources, and other. Each of these five general categories contained more specific constraints.

Table 10 illustrates that 76.4% of businesses felt that they were slightly, moderately or seriously constrained by “too much government regulation.” Exactly half of businesses (50.0%) did not feel that a “lack of government regulation” was a constraint to growth however, 43.8% of businesses felt that a “lack of government enforcement of (existing) regulations” was a constraint to varying degrees (slight, moderate or serious constraint).

Although most businesses felt that an excess of government regulation was constraining the growth of their businesses, a substantial portion of businesses also stated that the lack of government enforcement of existing regulations was a constraint, to varying degrees, to the growth of their businesses. In other words, businesses would like to see less government regulation, but at the same time they would like to see better enforcement of the regulations that are already in place.

Table 10. Constraints to Business Growth – for All Businesses

Constraints – All Businesses	Not Applicable	Not a Constraint	Slight Constraint	Moderate Constraint	Serious Constraint
Transportation					
Limited or poor air access for visitors	20.8%	31.8%	24.8%	14.7%	7.9%
Limited or poor ground access for visitors	17.1%	21.8%	26.0%	17.9%	17.1%
Travel safety concerns or hassles	18.0%	23.3%	27.3%	21.4%	10.0%
Business Growth					
High marketing costs	7.6%	14.6%	37.7%	25.6%	14.6%
Lack of marketing research	11.4%	34.1%	27.6%	21.1%	5.9%
Difficulty accessing capital \$ for expansion	15.5%	28.1%	22.4%	16.9%	17.1%
Lack of co-ordinated marketing	13.3%	34.5%	21.0%	25.6%	5.7%
Difficulty securing permits	13.1%	23.3%	33.9%	14.8%	15.0%
Difficulty securing insurance	7.5%	31.7%	23.2%	15.1%	22.6%
Difficulty developing good working relationship with First Nations	22.4%	39.2%	27.4%	3.7%	7.3%
Price competition	7.7%	30.1%	34.7%	9.3%	18.1%
Lack of accommodation facilities	21.0%	57.1%	18.3%	1.7%	1.7%
Poor quality accommodation services	22.1%	66.4%	7.6%	3.9%	0.0%
Competition from other sports and activities	7.9%	42.9%	32.3%	9.1%	7.9%
Government Regulations					
Too much government regulation	7.4%	16.3%	28.6%	18.4%	29.4%
Lack of government regulation	25.5%	50.0%	17.1%	2.0%	5.4%
Lack of government enforcement of regulations	20.8%	35.3%	16.6%	16.6%	10.6%
Canada/USA border issues	15.0%	32.2%	16.1%	18.4%	18.4%
Human Resources					
Finding staff with adequate training	7.7%	15.1%	36.5%	24.1%	16.6%
Retaining staff with adequate training	9.7%	29.7%	18.7%	23.6%	18.3%
Inadequate staff performance	17.4%	47.3%	23.9%	5.6%	5.8%
Other					
Weather constraints	5.9%	32.1%	24.4%	22.8%	14.8%

When these findings are paired with the answers from an open-ended question that asked respondents to state the three most serious constraints faced by their sea kayaking

business, it becomes apparent that the finding of “too much government regulation,” was specifically related to the amount of time and money required to obtain licenses, tenures and permits, as well as frustrations with the overall system and lack of benefits from these regulations. Qualitative comments pointed out the “lack of coordination between various levels of government who deal with these regulations”, as well as the “increasing amount of regulation for little return benefits.” Others mentioned the “bureaucracy in obtaining permits/cost of running in multiple locations”, the “slow park permit approval system” and “too many hoops to jump through.”

Table 10 also highlights that 77.2% of all businesses felt that the long-term growth of their business was slightly to seriously constrained by the inability to “find staff with adequate training.” This figure was especially high for members, at 90.9%. The qualitative responses from all businesses further support this constraint, with numerous references to the lack of certified and or qualified staff, and the lack of coordination between the government and various guide certifying bodies. Other companies commented on the “cost of good guides”, and the “desire to have certification and papers instead of wanting to paddle properly and confidently.” The ability to “retain staff with adequate training” was also seen as a slight to serious constraint by 60.6% of businesses.

Recently introduced regulations by National Parks requiring a certified Level III (Lead Guide) on all trips operating in National Parks and the lack of qualified Level III guides is causing considerable concern for businesses. The shortage of qualified guides may suggest the need for streamlining of the current training standards and processes, as well as the need for kayak companies to encourage Level I and II (assistant) guides to obtain the higher level certification (e.g. through higher wages, subsidized exam fees, seniority, in-house training etc.).

Over three quarters (77.9%) of businesses felt slightly to seriously constrained by high marketing costs. Furthermore, more than half of businesses (52.3%) felt slightly to seriously constrained by the “lack of coordinated marketing”. These figures are reflected in numerous comments made by respondents who expressed frustration with a “lack of

marketing knowledge,” “uncertainly about marketing to the US,” and a “lack of serious global promotion of sea kayaking.” Given that marketing was identified as the fourth highest operating expense by businesses (see Figure 10), and that nearly half of all businesses spent under \$5,001 dollars on marketing (see Section 3.3.3), it seems that companies would benefit from knowledge of effective, cost efficient marketing strategies and techniques that best reach their target markets.

Table 10 shows that 47.4% of businesses felt moderately to seriously constrained by air access for visitors, while 61.0% were moderately to seriously constrained by ground access, and 58.7% were constrained by travel safety concerns or hassles. Many respondents made comments regarding the high cost and timing of transportation in the province, particularly when involving ferries, as well as the limited or difficulty in accessing many areas. These comments are not surprising given that sea kayaking largely takes place near islands and coastlines, many of which are chosen because they are removed from major infrastructure development.

In addition to the above constraints, 63.7% of businesses felt slightly to seriously constrained by the difficulty of securing permits, while “difficulty securing insurance” was also identified as a slight to serious constraint by 60.9% of businesses.

Weather was also identified as a slight to serious constraint by 62.0% of businesses. Many respondents made comments regarding the “seasonal nature” of sea kayaking, stating that “bad or poor weather” as well as the fact that “clients see sea kayaking as a fair-weather activity” constrained their businesses. Although not specifically mentioned, the main operating season for sea kayak businesses is generally from mid-June to early or mid-September, depending on the region where a company operates. With a three-month operating season at best, businesses are acutely aware of inclement weather that affects their bookings.

Respondents were also invited to describe, in their own words, any constraints that were not covered in the previous survey question. While many of the respondents took the opportunity to expand upon constraints that have already been discussed in this report,

some respondents did state some additional constraints, such as the price of gas, conflicting industry practises between aquaculture, forestry and tourism, environmental issues such as forest fires and overall provincial resource management concerns, as well as competition from other emerging sea kayak destinations (i.e. New Zealand, Newfoundland, Chile). Numerous respondents offered suggestions on how to best address some of the most serious constraints that impact the long-term growth of their businesses. For a complete list of verbatim comments, please refer to Appendix D.

3.5 General Comments

The last question in the survey invited respondents to share any questions, comments or concerns they may have had. A number of respondents took advantage of this opportunity and their questions, comments, and concerns have been attached as Appendix D to this report.

4.0 SUMMARY, RECOMMENDATIONS AND CONCLUSIONS

4.1 Summary

Based on the findings of this research, it is apparent that the British Columbia's sea kayaking businesses make an important contribution to the province's economy. In 2005, sea kayaking companies had overall gross revenues attributable to sea kayaking of \$14,255,000. Gross revenue attributable to tourists participating in sea kayaking activities in British Columbia was \$11,277,700 for all businesses.

- This survey verified that there were approximately 114 businesses offering sea kayaking activities in British Columbia in 2005/2006;
- On average, businesses had been in operation for 11.5 years;
- Most businesses were relatively small employing, on average, 3.2 full-time staff throughout the year and 5.7 full-time staff through the summer months. On average, businesses employ 1.6 part-time staff year round, and 2.8 part-time staff during the summer months;
- Sea kayak businesses provided products and services to almost 70,000 clients in 2005;
- 63.5% of all businesses offered sea kayaking as their primary businesses activity in 2005;
- Overall, 34.7% of businesses stated that were strictly sea kayaking businesses;
- The majority of businesses (54.1%) offered sea kayaking tours as the primary service offered to sea kayakers, followed by sea kayak rentals (25.7%);
- In 2005, the clientele was almost evenly divided between males and females, with a slightly higher percentage of female clients (53.0%). The majority of clients were between 35 and 54 years of age, and traveled mainly as couples, families or individuals;
- In 2005, the sea kayaking sector drew most of its clients from the domestic markets of British Columbia and Alberta. Internationally, the sector drew clients primarily from the United Kingdom, Germany, Austria and Switzerland;

- Businesses reported that most of their sea kayaking clients stayed between two and five nights in the local community and that over half of their clientele travelled to the community specifically to participate in sea kayaking activities;
- Over three quarters of all clients in 2005 were classified as tourists (for the purposes of this research, a tourist was defined as “someone who is not a resident of your community”);
- The four most commonly used marketing methods in 2005 were respondents’ own web site, brochures and/or posters, magazine ads, and other websites. Businesses reported that most of their bookings came from wholesale travel agents, repeat clients/guests, and word of mouth;
- Overall, businesses spent an average of \$8,910 on marketing and advertising efforts in 2005:
- The three largest sources of operating expenses for businesses were labour, new facilities and/or equipment (capital costs), and transportation costs;
- The majority of businesses stated that too much government regulation was one of the top issues constraining the long-term growth of their businesses; however, nearly half of businesses indicated that a lack of government enforcement of existing regulations was also a constraint. In other words, businesses that do spend the time and money to comply with regulations can often be at a comparative financial disadvantage to those who operate outside of the regulations;
- More than three-quarters of all businesses (77.2%) felt that the long-term growth of their business was slightly to seriously constrained by the inability to “find staff with adequate training”. The ability to “retain staff with adequate training” was also seen as a slight to serious constraint by 60.6% of businesses;
- A high percentage of businesses also felt that their long-term growth was constrained by high marketing costs, accessibility issues including the cost and timing of air and ground transportation, and general weather/seasonality.

4.2 Recommendations

The results from this study lead to several observations and recommendations for the sea kayaking sector. With an average business age of 11.5 years, this is still a relatively young, although economically significant sector. While there are a handful of experienced companies who have been in operation for over 25 years, there are a higher number of relatively small, newer companies.

Although, many businesses have expressed strong and often opposing opinions and attitudes toward the direction that the industry should take, one significant concern expressed by many businesses was their difficulty in obtaining and retaining qualified staff. Concerns were also expressed about the length and the cost of training and certification. Certification issues are further complicated by the fact that there are a number of organizations that certify guides in BC. One respondent suggested that the government should be pressed to have one set of standards across BC. Sea kayaking businesses may wish to work more closely with the various colleges, companies and organizations that offer guide training courses to develop a set of standards for sea kayaking in British Columbia. More agreement is needed between businesses, certifying bodies and possibly the government around appropriate skills and the cost of such training.

Many businesses indicated concerns about transportation and access. While this may be challenging to resolve given the locations where sea kayaking trips take place, solutions could be explored through discussions between those involved in the sea kayaking sector and government, remote communities, and public and private transportation services, particularly with regards to ferry and air service, as well as road quality.

Resource management was an issue that was frequently mentioned by respondents, as was the competition for natural resources between the sea kayaking, aquaculture, and the forestry. Many respondents expressed concerns over the impact of aquaculture and logging on ecosystems, as well as the impact on sea and land viewsapes where kayak companies operate. Many operators also expressed their concern that natural areas are

rapidly disappearing, with little regard for the impact that this has on tourism in general. One respondent lamented that campsites were being turned “into log dumps.” Consequently, a recommendation is made that businesses continue to work with the various nature-based associations, such as the Wilderness Tourism Association, as well and the Council of Tourism Associations (COTA) to more clearly convey the value of the sea kayaking sector to governments and the public.

Finally, it would be valuable to undertake further research on the sea kayaking sector from a client perspective. Client surveys could be undertaken with sea kayaking businesses that are willing to work with Tourism BC to better understand subjects like, client demographics, trip planning, spending and post-trip satisfaction, to inform marketing and product development activities.

5.0 LIMITATIONS

There are limitations, as follows, to the research presented herewith:

- The research was undertaken during the busy season for businesses and, therefore, some businesses may have been too busy to participate;
 - Although every effort was made to have an up-to-date database, the database, compiled in 2005 may have included some businesses that were no longer in businesses and/or businesses that were in their initial years of operation;
 - Many of the questions required respondents to indicate ranges of values or percentages. Consequently, many stated values may be based on best estimates as opposed to actual values;
 - Data regarding clients were, in many cases, best estimates by respondents, as this survey did not collect data directly from clients;
 - Some of the respondents in this study were lodges, resorts or accommodation-styles properties that offer kayaking as one of their on-site activities.
- Consequently, the majority of the revenue from these businesses would most likely come from accommodation, food and beverage, with a small amount of revenue from sea kayaking.

APPENDIX A - METHODOLOGY

Mail back questionnaire

The mail back questionnaire sought to develop a more comprehensive understanding of sea kayaking businesses operating in British Columbia. Respondents were asked to respond to the questions using the calendar year of 2005 as a timeframe for most questions, although some questions related to changes from 2004 to 2005, or an accumulation of the years 2003, 2004, and 2005. Respondents were asked to respond to questions on the following topics:

- Nature of the business (services or products and services, years in business);
- Primary and secondary business activities;
- Primary and secondary services offered to sea kayakers;
- Location of head office;
- Region(s) of BC where sea kayaking trips are conducted;
- Percentage of gross business revenue related to clients participating in sea kayaking activities (including guided tours, courses, lessons, and rentals) and total gross revenue from products and services related to sea kayaking;
- Constraints to growth, including the three most serious constraints to growth, and suggestions about how to address these constraints;
- Top priorities for the SKGABC;
- Number of clients and/or tourists;
- Percentage increase/decrease in volume of clients;
- Demographic breakdown of clients;
- Percentage of repeat clientele;
- Percentage of clientele who were tourists (a tourist was defined as someone who was not a resident of the community in which the business was located)
- Length of tourist client stays;
- Percentage of tourist clientele who travelled to the community to specifically participate in sea kayaking activities;
- Business staffing numbers;

- Marketing expenditures and methods;
- Percentage of sales from various marketing methods
- Operating expenditures, including specific questions related to:
 - Purchase and repair of sea kayaks and other equipment
 - Permits, including Crown land tenures and Provincial and National Parks' permits;
 - Liability insurance;
- Opportunity for respondents to share questions, comments, or concerns;
- Extra questions added for SKGABC member businesses (results not available in this report):
 - Willingness to pay more in membership fees in order to have a paid executive assistant to help the sea kayaking industry present a unified voice;
 - Quantification of an acceptable increase in membership dues to support an executive assistant;
- Extra questions added for non-member businesses (results not available in this report):
 - Employment of guides certified by the SKGABC and/or other certifying bodies, including number of days employed in 2005, and importance of hiring certified guides;
 - Interest in joining the SKGABC

In March of 2006, questionnaires were mailed to 189 businesses offering sea kayaking services or sea kayaking services and products in the province of British Columbia, Specifically, 45 questionnaires were mailed to member businesses of the SKGABC and 144 questionnaires were mailed to non-member sea kayaking businesses. An introductory letter, which provided details about the nature of the research, was included with the survey, as was a stamped return envelope to Tourism BC. Reminder letters were sent to non-responders in April of 2006, followed by a second mailing in April of 2006. During the months of June, July, August, and September non-responding businesses were telephoned in an attempt to secure their completed questionnaires.

The survey closed on October 10, 2006 at which time a total of 60 completed surveys had been received. Surveys returned unopened by Canada Post were not included in the calculation of the response rates, nor were surveys that were sent to companies that indicated they do not offer sea kayaking services and products. Similarly, if a company indicated that they only offered sea kayaking products they were requested to return the survey without answering the remainder of the questions (products were defined as retail sales). Consequently, the overall response rate for the survey was calculated at 52.6% (60 completed surveys from 114 existing companies).

APPENDIX B –NON- MEMBER SURVEY

Commercial Sea Kayaking Tourism Survey

Working together to build your
tourism business in British Columbia



Please return your completed questionnaire
in the enclosed envelope and mail to:

Prof. Nicole Vaugeois
Department of Recreation and Tourism
Malaspina University-College
Nanaimo, BC V9R 5S5

If you have any questions regarding this research, please call:

Valerie Sheppard, Research Analyst, Tourism British Columbia
Nicole Vaugeois, PhD., Malaspina University College

SECTION 1: The first section of this survey asks you about your clients and the products or services you offer. Please provide the most accurate responses possible.

Q1. In **2005**, did you offer sea kayak services and/or products to clients?

A) Yes → **Please proceed to question 2.**

B) No → **End of survey. Please return this survey in the envelope provided. Thank you for your time.**

Q2. In 2005, did you offer **only** sea kayaking products (retail sales) and **not** sea kayaking services (rentals, outfitting, guided tours, training courses, lessons)?

A) No, my company offered only services → **Please proceed with the rest of the questionnaire.**

B) No, my company offered products and services → **Please proceed with the rest of the questionnaire.**

C) Yes, I offered only sea kayaking products → **End of survey. Please return this survey in the envelope provided. Thank you for your time**

Q3 . Please circle the **primary** activity offered by your business in **2005**. (Your primary activity would be the activity that was your highest revenue generator. Please circle **one** response only.)

- a. Sea kayaking
- b. White-water rafting
- c. Sport or guided fishing
- d. Accommodation
- e. Golfing
- f. Birding
- g. Hiking
- h. Cultural tours
- i. Surfing
- j. Scuba Diving
- k. Whale watching
- l. Other water-based wildlife viewing
- m. Other (please specify): _____

Q4. In **2005**, what other activities or adventure sports, if any, did your business offer to your clients, in addition to sea kayaking? (Please check **all** that apply to your business.)

- a. ☐ Our company only offered sea kayaking
- b. ☐ White-water rafting
- c. ☐ Sport or guided fishing
- d. ☐ Accommodation
- e. ☐ Golfing
- f. ☐ Birding
- g. ☐ Hiking
- h. ☐ Cultural Tours
- i. ☐ Surfing
- j. ☐ Scuba Diving
- k. ☐ Whale watching
- l. ☐ Other water-based wildlife viewing
- m. ☐ Other (please specify): _____

Q5. How many years has your business been offering products/services to clients participating in **sea kayaking**? (i.e. Rentals, outfitting, guided tours, training courses, lessons, retail sales)

_____ **NUMBER OF YEARS**

Q6. In **2005**, what was the **primary** service your business provided to **sea kayakers**? (Please circle **one** response only.)

- a. Sea kayak tours (day trips and multi-day trips)
- b. Kayak rentals
- c. Sea kayaking instruction
- d. Recreational training (non-professional)
- e. Guide training (professional)
- f. Other (Please specify) _____

Q7. In **2005**, what was the **secondary** service your business provided to **sea kayakers**? (Please circle **one** response only.)

- a. Sea kayak tours (day trips and multi-day trips)
- b. Kayak rentals
- c. Course instruction provider
- d. Recreational training (non-professional)
- e. Guide training (professional)
- f. Other (Please specify) _____
- g. None

- Q8. Approximately what **percentage** of your **2005 gross revenue** came from clients or guests who participated in sea kayaking? Please include all revenue from guided tours, courses, lessons, and rentals.

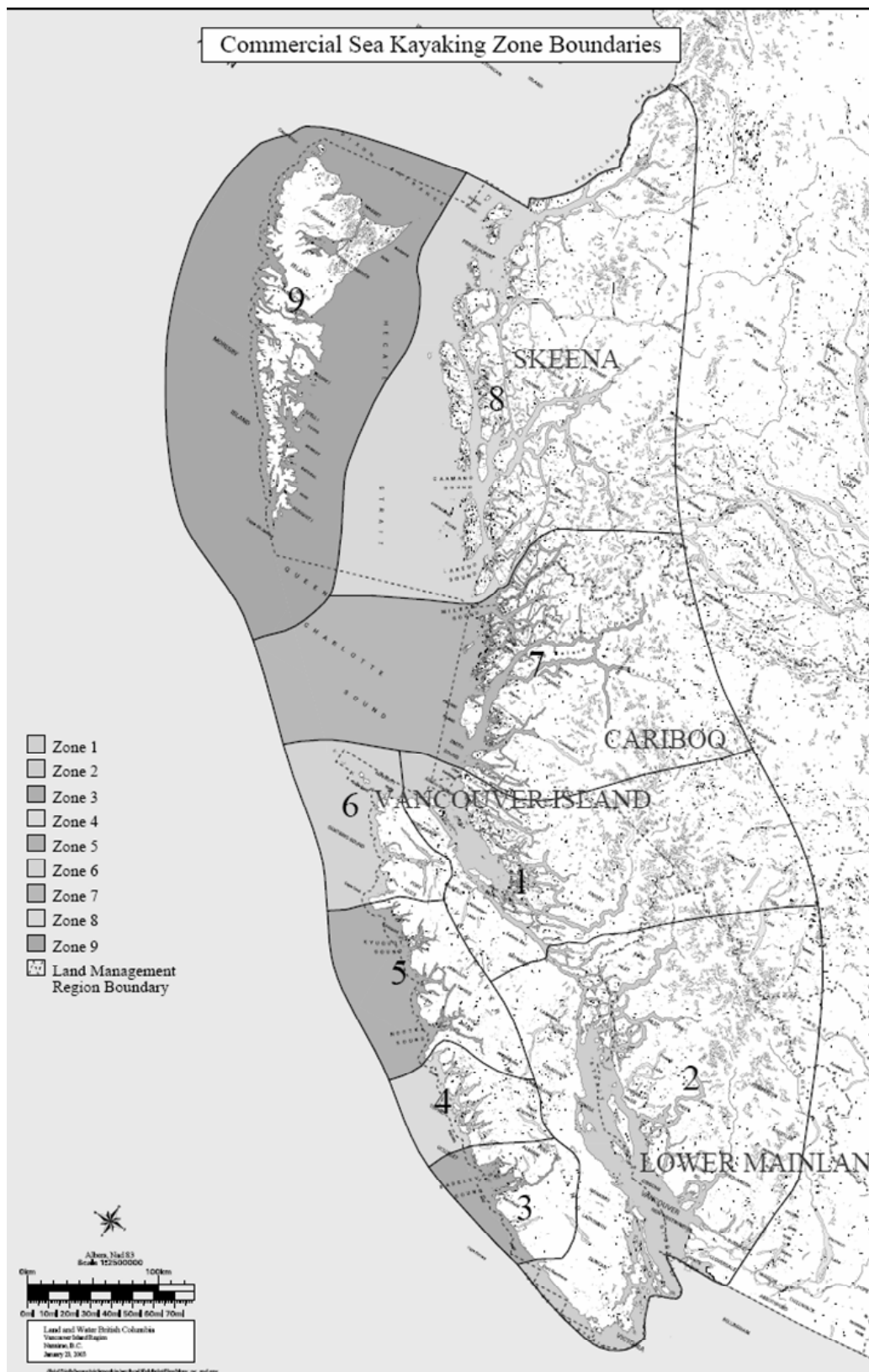
_____ % of **2005 GROSS REVENUE** from Sea Kayak clients/guests

- Q9. In what **city** or **town** is your business based? (i.e. head office)

- Q10. In what region(s) of BC does your business usually conduct **sea kayaking** trips? (Please check **all** that apply.)

- a. _____ We do not offer sea kayak trips
- b. _____ Northern British Columbia
- c. _____ Caribou Chilcotin Coast
- d. _____ Vancouver Coast and Mountains
- e. _____ Vancouver Island East
- f. _____ Vancouver Island West
- g. _____ Gulf Islands
- h. _____ Other

Q11. Please mark **directly** on the map below the area(s) where your business usually conducts sea kayaking trips.



SECTION 2: This section of the survey asks you about your sea kayak clients. Please provide the most accurate responses possible.

- Q1. Approximately how many **sea kayak clients** did your business serve in **2005**? Do **NOT** include clients who **only** purchased retail products. Please specify the number.

_____ **NUMBER OF SEA KAYAK CLIENTS**

- Q2. Compared to 2004, did your volume of **sea kayak clients** increase, decrease, or stay the same in 2005?

- a. Increased → By approximately what percent? _____ %
 b. Decreased → By approximately what percent? _____ %
 c. Stayed the same _____

- Q3. Approximately what percentage of your **2005 sea kayak clients** were male and what percentage were female?

- a. _____ % Male
 b. _____ % Female
 Total = 100 % of **sea kayak clients**

- Q4. Approximately what percentage of your **2005 sea kayak clients** were repeat clients? (A repeat client has purchased your products or services on at least one previous occasion.)

_____ **% REPEAT SEA KAYAK CLIENTS**

- Q5. Approximately what percentage of your **2005 sea kayak clients** were within each of the following age categories? Please mark zero percent (**0%**) if there were no sea kayakers in a particular group.

- a. _____ % 17 years or younger
 b. _____ % 18 to 24 years
 c. _____ % 25 to 34 years
 d. _____ % 35 to 44 years
 e. _____ % 45 to 54 years
 f. _____ % 55 to 64 years
 g. _____ % 65 to 74 years
 h. _____ % 74 years and over
 Total = 100 % **sea kayak clients**

Q6. Has the age makeup of your **sea kayak clients** changed in the last **10** years (or since opening, if operating for less than 10 years)?

- a. _____ Yes (Please briefly explain below.)
b. _____ No

Q7. Thinking about the size of group your **sea kayak clients** travelled with, approximately what percentage of your **2005 sea kayak clients** were within each of the following categories? Please mark zero percent (**0%**) if there were no sea kayakers in a particular group.

- a. _____ % Individual
b. _____ % Couples
c. _____ % Families
d. _____ % Friends
e. _____ % Tour Group
f. _____ % Other _____
Total =100 % of **sea kayak clients**

SECTION 3: This section of the survey asks you about your TOURIST clients (A tourist is defined as someone who is not a resident of your community)

Q1. In **2005**, approximately what percentage of your **sea kayak clients** were **tourists**? (A tourist is defined as someone who is not a resident of your community.)

_____ % of sea kayak clients who were **TOURISTS**

Q2. Please indicate what percentage of your **2005** sea kayak **tourist** clients came from each of the following geographic markets? Please mark zero percent (**0%**) if there were no sea kayakers in a particular group.

- a. _____ % Within British Columbia
- b. _____ % Alberta
- c. _____ % Ontario
- d. _____ % Other Canada
- e. _____ % Northern Western US (Washington, Oregon, Idaho, Montana, Alaska)
- f. _____ % Eastern US (New England states, New York)
- g. _____ % California
- h. _____ % Other US
- i. _____ % United Kingdom
- j. _____ % Germany/Austria/Switzerland
- k. _____ % Other Europe
- l. _____ % Asia
- m. _____ % Other _____

Total = 100 % of sea kayak **tourist** clients

Q3. In **2005**, approximately how many nights did your sea kayaking **tourist** clients stay in your community? (Including before, during, and after the sea kayak trip.) Please express this number, to the best of your ability, as a **percentage** of your total clients who were **tourists**. Please mark zero percent (**0%**) if there were no sea kayakers in a particular group.

- a. _____ % who were same day visitors
- b. _____ % who stayed 1 night
- c. _____ % who stayed 2 nights
- d. _____ % who stayed 3-5 nights
- e. _____ % who stayed 6+ nights

Total = 100 % of sea kayak clients who were **tourists**

Q4. For what percentage of your sea kayaking **tourist** clients, was sea kayaking the main reason for their travel to your community?

_____ % of sea kayaking **tourist** clients

SECTION 4: This section of the survey asks you about staffing in your business.

- Q1. Please fill in the table below with corresponding answers pertaining to your full and part-time **paid** staff. **Please include yourself and any family members working for your company.**
- During what months in **2005** did your business employ full-time and/or part-time staff? (Please place a check mark beside **all** months where your company had **paid** staff in the first column of the following table)
 - How many full-time **paid** staff did your business employ during each month of **2005**? (Please record your responses for each month in the table below under the second column b)
 - How many part-time **paid** staff did your business employ during each month in **2005**? (Please record your responses for each month in the table below under the third column c)

a. In 2005, what months did you employ full or part-time paid staff? Check all appropriate months.	b. How many full-time paid staff did you employ in each month in 2005? Fill in the number of full-time staff you had in each month. Full-time staff worked 30 hours or <u>more</u> per week.	c. How many part-time paid staff did you employ in each month in 2005? Fill in the number of part-time staff you had in each month. Part-time staff worked <u>less</u> than 30 hours per week.
Please check all that apply	# of full-time staff per month	# of part-time staff per month
<input type="checkbox"/> January		
<input type="checkbox"/> February		
<input type="checkbox"/> March		
<input type="checkbox"/> April		
<input type="checkbox"/> May		
<input type="checkbox"/> June		
<input type="checkbox"/> July		
<input type="checkbox"/> August		
<input type="checkbox"/> September		
<input type="checkbox"/> October		
<input type="checkbox"/> November		
<input type="checkbox"/> December		

- Q2. In **2005**, did you employ any guides certified by the Sea Kayak Guides Alliance of BC?

- ☐ Yes
- ☐ No

Q3. If yes, how many days in **2005** did you employ guide(s) certified by the Sea Kayak Guides Alliance of BC?

_____ **NUMBER OF DAYS IN 2005**

Q4. In **2005**, did you employ any guides/instructors certified by the following organizations? (Please circle **all** that apply.)

- a. CRCA (Canadian Recreational Canoeing Association)
- b. CFOKE (Canadian Federation of Ocean Kayak Educators)
- c. Association of Canadian Sea Kayak Guides
- d. NOLS (National Outdoor Leadership School)
- e. Other organization(s) _____

Q5. Do you feel it is important to your business to have guides certified by an external body, such as the Sea Kayak Guides Alliance of British Columbia?

- a. _____ Yes
- b. _____ No

SECTION 5: This section of the survey asks you about your company's marketing and advertising. Please provide the most accurate responses possible.

Q1. What **percentage** of your company's **total bookings and/or sales** related to **sea kayaking** came from the following sources in **2005**? Please mark zero percent (**0%**) if there were no sea kayakers in a particular group.

- a) _____ % Repeat Guests/Clients
 - b) _____ % Word of Mouth
 - c) _____ % Drive By/Walk in
 - d) _____ % Internet bookings (new clients)
 - e) _____ % Wholesale/ Travel Agents
 - f) _____ % Print marketing/Advertising
 - g) _____ % Other _____
- = 100 % Total bookings and/or sales

Q2. How much did your business spend on marketing and advertising in the **2005**?
(\$ Canadian) (Please circle **one** answer only.)

- a. \$ 0 - 1,000
- b. \$ 1,001 - 2,500
- c. \$ 2,501 - 5,000
- d. \$ 5,001 - 10,000
- e. \$10,001 - 15,000
- f. \$15,001 - 20,000
- g. More than \$20,000

Q3. Please fill in the table below.

- A. What marketing methods did you use in **2005**? Please mark each method used in **COLUMN A**.
- B. For each method used, please indicate the approximate **percentage of your total marketing budget** you allocated to this method in **2005**. For each marketing method selected, fill in the appropriate percentages in **COLUMN B**. The total should equal 100%.

Marketing Methods	COLUMN A 2005 Methods	COLUMN B % of total marketing budget
Brochures, Posters	_____	_____ %
Consumer or Trade Shows	_____	_____ %
Travel Agents	_____	_____ %
Wholesale Operators	_____	_____ %
Direct Mail to Future Prospects	_____	_____ %
Direct Mail to Past Customers	_____	_____ %
E-mail Promotions	_____	_____ %
Film Shows, Slide Shows	_____	_____ %
Newspaper Ads	_____	_____ %
Your Web Site	_____	_____ %
Other Web Site	_____	_____ %
Provincial/Regional Travel Guides	_____	_____ %
Travel Agency Travel Guides	_____	_____ %
Radio or Television Ads	_____	_____ %
Magazine Ads	_____	_____ %
Public Relations	_____	_____ %
Yellow Pages	_____	_____ %
Other: _____	_____	_____ %
None	_____	_____ %
TOTAL		= 100 %

SECTION 6: This section of the survey asks you about your sea kayak business spending and revenue from sea kayak clients.

Q1. Approximately, how much did your business spend on the **purchase and/or repair of sea kayaks** in the last three years? **(2003, 2004 and 2005 combined.)**

Please circle **one** answer only.

- a. \$0 - 5,000
- b. \$ 5,001- 10,000
- c. \$10,001- 15,000
- d. \$15,001- 20,000
- e. \$20,001- 25,000
- f. \$25,001- 30,000
- g. \$30,001- 35,000
- h. \$35,001- 40,000
- i. More than \$40,000

Q2. In **2005**, approximately, how much did your business spend on **other** equipment and repairs to equipment (includes vehicles, trailers, gear, office equipment)? **Do NOT include sea kayak purchases or repairs to sea kayaks in this answer.** (Please circle **one** answer only.)

- a. \$ 0 - 5,000
- b. \$ 5,001-10,000
- c. \$10,001-15,000
- d. \$15,001-20,000
- e. \$20,001-25,000
- f. \$25,001-30,000
- g. \$30,001-35,000
- h. \$35,001-40,000
- i. More than \$40,000

Q3. In **2005**, approximately how much did your business spend on permits, including all crown land tenures, and Provincial and National Parks' permits? (Please circle **one** answer only.)

- a. \$0- 500
- b. \$ 501- 1,000
- c. \$1,001- 1,500
- d. \$1,501- 2,000
- e. \$2,001- 2,500
- f. More than \$2,500

Q4. What were your total revenues from **sea kayak products and/or services** in **2005**? (Please circle **one** answer only.)

- a. \$0 - 50,000
- b. \$ 50,001 - 100,000
- c. \$100,001 - 150,000
- d. \$150,001 - 200,000
- e. \$200,001 - 250,000
- f. \$250,001 - 300,000
- g. \$300,001 - 350,000
- h. \$350,001 - 400,000
- i. More than \$400,000

Q5. Of your total **2005 operating expenses**, what percentages were allocated to each of the following categories? Please fill in the appropriate percentage. Please mark zero percent (**0%**) if there was no expense in a particular category.

- _____ % Labour expenses, including payroll taxes & benefits
- _____ % Advertising and promotional activities
- _____ % Liability insurance
- _____ % New facilities and/or new equipment (Capital costs)
- _____ % Maintenance of existing facilities and/or equipment & vehicles
- _____ % Transportation costs, including fuel
- _____ % Mortgage and/or rent
- _____ % Administrative expenses
- _____ % Taxes (Business and property)
- _____ % Food and beverage
- _____ % Interest payments
- _____ % Depreciation of assets
- _____ % Membership fees & Permits
- _____ % All other expenses (Please specify categories) _____

= 100 % Total **2005 operating expenses**

SECTION 7: This section of the survey asks you questions about the operating environment of your business and barriers to growth.

Q1. Considering the long-term growth of your business, please rate **all** of the constraints below. If the constraint listed does not apply to your business, please check in the box "not applicable."

Constraints to business growth	Not applicable	Not a constraint	Slight Constraint	Constraint	Significant constraint
Transportation					
Limited or poor air access for visitors					
Limited or poor ground access for visitors					
Travel safety concerns or hassles					
Business Growth					
High marketing costs					
Lack of marketing research					
Difficulty accessing capital dollars for expansion					
Lack of co-ordinated marketing					
Difficulty securing permits					
Difficulty securing insurance					
Difficulty developing a good working relationship with First Nations					
Price competition					
Lack of accommodation facilities					
Poor quality accommodation services					
Competition from other sports and activities					
Government Regulations					
Too much government regulation					
Lack of government regulation					
Lack of government enforcement of regulations					
Canada/USA border issues					
Human Resources					
Finding staff with adequate training					
Retaining staff with adequate training					
Inadequate staff performance					
Other					
Weather constraints					

Q2. Are there any constraints you would like to add that are not listed above? Please specify.

Q3. What do you consider to be the three (3) most serious constraints to your **sea kayaking** business?

1.

2.

3.

Q4. Thinking of the most serious constraints listed in section 7, Question 3, do you have any suggestions about how to address the issues that will impact your company's long-term growth? (Please explain below.)

Q5. Would you be interested in joining the Sea Kayak Guides Alliance of British Columbia?

- a. ☐ I am already a member
- b. ☐ Yes → Please contact the SKGABC at info@skgabc.com or **250-724-2098**.
- c. ☐ No
- d. ☐ Not sure → Please contact the SKGABC at info@skgabc.com or **250-724-2098**.

Q6. If you answered no in the above question, please explain why?

Q7. Are there any questions, comments, or concerns that you would like to share with us?

Thank you very much for your participation!
Your responses will be an important start in measuring the size and economic impact of the commercial sea kayaking industry in British Columbia, thus ensuring that its importance is recognized and it has a strong voice in the province.

APPENDIX C – SUGGESTIONS TO ADDRESS THE MOST SERIOUS BUSINESS CONSTRAINTS

<i>Thinking of the most serious constraints listed in Section 7, Question 3, do you have any suggestions about how to address the issues that will impact your long-term growth? (Please explain below.)</i>
Insurance companies seem to be able to determine your business success without any true knowledge - they can just slap a cost down that in most cases are overkill.
Too many things to mention and not enough time... besides, the "system" and government involvement particularly in BC as well as Parks Canada policies etc. are not going away or to change whatever we do. That's hopeless and not worth investing time and energy in.
Highly subsidized Crown Corporations on tourism commissions mandated to assist tourists does seem to place priority on marketing high-end well-established businesses that least need the help.
Promote the idea of kayak Motherships where their experience is much greater than camping on the beach with the bears. Get hot showers, eat gourmet meals, travel light, and travel much further ... kayakers would have much more enjoyment out of their kayak experience by using a Mothership.
Insurance too high Transportation / seasonal business Too many hoops to jump through
Co-op Insurance. As an accident-free company for 15 years, and not knowing of any industry related claims in as many years, I think this industry could/should negotiate better rates.
Make it less expensive & less red-tape. This government has increased red-tape so much it is very hard to conduct tourism & many other businesses.
Better marketing (more \$\$) will show potential clients why the trip is worth the spend. – We can't lower price, so we have to explain it!
Member of ACSKG
Paving road into Zeballos, eliminating BC Parks Board, compensation from forest companies and/or input on future cuts that affect views when paddling.
The growth of our marketing and booking services and hence, kayaking in BC, depends on the retention of qualified and skilled operators with a dedication to customer service. While the operators we work with practice standards congruent with this professionalism, there are other operators who do not. As such, some tourists are not given a favourable impression of kayak industry in BC. As examples, we routinely get last minute inquiries from clients who have had their departures cancelled at the last minute by an operator and are left "holding the bag" with booked air and accommodation for which they are financially accountable. There is confusion in the industry concerning the legality of the services provided by the operators that are supplemental to kayak tours. Many operators who transport clients to

and from the kayak put-in-point do not have Motor Carrier authority, or do not require their guides to have a Class 4 license. This means that the vehicles, mainly vans, are not mechanically inspected, may have inadequate insurance or are driven by unskilled drivers. Others package kayak tours with hard shell accommodation or other elements that are contrary to the Travel Agents Act.
<ul style="list-style-type: none"> • Human resources practices vary. Some operators contract with their guides, instead of hiring them as employees, which in some cases, is contrary to the Employment Standards Act. Consequently WCB or EIC premiums may not have been made on the employee's behalf. • Some guides lead tours without appropriate or with inadequate certification. As an example, guides certified to lead day tours often lead multi-day tours.
Insurance companies do not understand and have no clear grasp of the kayaking business. Maybe the tourism industry as a whole should get together to lobby for better rates or to form some kind of association to be able to reduce insurance cost.
<ul style="list-style-type: none"> • Land Tenure: Allow tenure equitable to fish farms/forest tenure etc. • US: Passport for US citizens to come to Canada a problem • Poor Forestry practices: Stop poor forestry practices. Recognize tourism values. Stop cutting old growth.
Promote, preserve and protect our unspoiled natural environments is the single greatest issue.
The majority of sea kayak operators attach a high value to lifestyle of the industry, in general, and charges too little for services. This is not good or bad, it just is. It presents long-term vision of commitment, though, because good people (with experience and ethics and value) eventually tire of all the work and the limited financial gains.
Moratorium on logging in areas frequented by tourists
Government at <u>all</u> levels do not seem to understand the economic value of eco-tourism, and especially sea kayaking tourism. BC has an incredible potential, however the government must help realize this potential. How? <ul style="list-style-type: none"> - Develop management plans for key areas and <u>act</u> on these plans. - Develop serious promotional/ advertising programs - Give operators the confidence to grow their businesses by developing policy that ensures conflicting industries no impact sea kayaking.
It is time government set up and enforce standards for sea kayaking businesses. There are too many bad companies with poorly trained guides that charge cheap prices. This is a huge safety issue and will have consequences on insurance costs and on the reputation of the industry.
I do not have a solution but I have confidence that the industry will stabilize in the long term to a degree. It will never be an industry with any decent return on investment
Do something about recreational users – education and permits. Commercial users impact the area less than the public. We are knowledgeable and while leading tours we are teaching respect and appreciation of nature. The general public cause damage and are unsafe and untrained.
Get government to listen to us regarding the issues and not ram policy down our throats. Need a more reasonable set of guide certifications and less expensive for guides to retain them in industry.
It is hard to find part time staff who are willing to pay the cost of becoming certified

Certified courses should be less expensive
<ul style="list-style-type: none"> • Collective approach within industry to buy insurance as a body versus individual entrepreneurs. • Reduce environmental impact by reducing green house gas emissions that are affecting our planet and weather patterns. (Maybe my next life) • Work with other outfitters and refer business to those locations in a reciprocal manner. Client sharing allows each outfitter to operate in the waters they know, rather than trying to compete in a manner that could be detrimental to both.
<p>Guides already with assistant status, once they log i.e. 100 days, automatically get lead guide.</p> <p>For Nootka for example we need to apply to 2 parks + BC lands + water, a total of 3 permits</p> <p>For Clayoquot 3 different BC park applications => why not 1.</p>
Affordable, short training for leaders is needed. Current certification schemes are expensive and time consuming. Should certification be mandatory outside of existing parks requirements it will be hard to find staff in the future.
Coordinated effort to market guided BC kayaking
<ul style="list-style-type: none"> • Advocacy to government for better funding; • Ensure companies operate with insurance and certified guides – better policing by government to protect public; • Educate BC Tourism/ government about kayak industry, i.e. better communication of company needs and operating costs to government so they don't have hands-out but are trying to assist their small businesses.
<ul style="list-style-type: none"> • I'm working on improving web presence. It's improving each month • We are spreading the word slowly. Trying to learn marketing strategies
Even though tourism is a leading economic activity (by far) in many areas, government gives greatest consideration and freedom to a declining forest sector. "Multiple use" is a myth. Soloman's solution. i.e. cutting the baby in half does not work. Heavy industry and tourism mostly incompatible. Protecting the foreshore and better landscape or view shed management essential.
<ul style="list-style-type: none"> • Insurance – an industry wide insurance scheme • Employee benefit programs – support Paddle Canada certs; include an instructor part of the Alliance

APPENDIX D – QUESTIONS, COMMENTS AND CONCERNS

Very worried about First Nations issues, they want to rule the entire west coast and are very difficult to deal with. They could kill the sea kayaking industry with their land claims.
Public Education around sea kayaking is an important element in keeping the sport alive.
Certification committee should not consist of people who give exams or courses => hence conflict of interest.
Should have mailed out survey earlier. I did not receive until a day or two before the deadline. Then I was out of town until late March.
Your questionnaire is too specific and could have probably been more widely answered had the questions been easier to ascertain. It took me far too long to fill this questionnaire out.
Thanks for doing this.
I have seen no improvement in our business environment whatsoever. The opposite is true. Each year, even more costs and bureaucratic “waste” is dumped on us. We’d like to improve our services for our clients but bureaucracy doesn’t let us. Who cares if we bring tourists into this province and generate revenue and employment?
Kayaking is not a major venue in our operation but rather another form of recreation available with biking, hiking, fishing, etc.
You have my permission to call me for a more in-depth discussion of the sea kayaking experience on the BC coast. I have some negative comments to make and they should be a part of your learning experience in this research. I am broke and in the “poor house” because of sea kayaking. I’ve almost given up on it, although we do have three guests signed up this summer – 2006, but that’s not enough. It’s been a dismal, failure - I mostly supported the kayak industry to my detriment. It took a couple of hours for me to complete this properly so I hope you will include it, even though late. Call me for a reality check.
Don’t put too much stock in my responses. Mine is a niche business – a sideline to my job, and most of my resources comes from one or two contracts. I don’t think I fit the profile and my response could skew your results in an un-meaningful way.
The questions with percentages as the answers were a Royal Pain in the Buttocks!!