TOURISM BRITISH COLUMBIA
CANADA

RESEARCH SERVICES

CHARACTERISTICS OF THE COMMERCIAL NATURE-BASED TOURISM INDUSTRY IN BRITISH COLUMBIA

January 2005

In cooperation with:

Wilderness Tourism Association

Research Services, Tourism British Columbia

Web: www.tourismbc.com/research Email: Research@tourismbc.com

Executive Summary

The Wilderness Tourism Association (WTA) secured funding from the provincial government (Ministry of Sustainable Resource Management) to measure the size and characteristics of the commercial nature-based tourism industry in 2001. This report describes the characteristics of commercial nature-based tourism in British Columbia including a summary of the economic impacts. A previously published report[1] describes the economic impacts of commercial nature based tourism in more detail. The project was initiated in the spring of 2002 and was coordinated by Research Services, Tourism British Columbia on behalf of the Wilderness Tourism Association.

- There are approximately 2,200 businesses offering nature-based activities in the province of British Columbia, excluding simple accommodation facilities[2], marinas and stand-alone campgrounds.
- In 2001, just under 966,000 tourists spent a total of $908.9 million dollars while at nature-based tourism businesses in British Columbia.
- When all spin-off impacts were considered, nature-based tourism businesses generated $1.55 billion in revenues and $783 million in Gross Domestic Product (GDP) for British Columbia in 2001. On average, when all spin-off impacts are accounted for, nature-based businesses generated $632 per client day for British Columbia in 2001. These figures do not include client spending prior to and after an experience at nature-based businesses. Previous research has demonstrated that this additional spending can be substantial and much of it should be considered a direct result of commercial nature-based tourism[3].
- More than half of those businesses operate in the Vancouver Island, Victoria and the Gulf Islands (27%) or the Vancouver Coast and Mountains tourism regions (25%). A fifth of nature-based businesses operate in Northern BC (18%) and fewer operate in the Thompson Okanagan (11%), the Kootenay Rockies (10%) or the Cariboo Chilcotin Coast (9%) tourism regions.
- Total employment resulting from commercial nature-based tourism activities is estimated at 20,776 earning some $556.2 million in wages and salaries and benefits during 2001. This

[1] The first report entitled *Economic Value of Commercial Nature-Based Tourism in British Columbia*, is available on the Research Services part of Tourism British Columbia's corporate website www.tourismbc.com or the Wilderness Tourism Association website www.wilderness-tourism.bc.ca.

[2] Simple accommodation facilities are businesses like motels or vacation rentals that do not provide facilities other than accommodation. They are not a destination lodge (fixed roof) and are not included in this count. However, comprehensive and standard lodges are included in this analysis. A comprehensive lodge is a destination lodge (fixed roof) and offers activities at an extra cost (which could be embedded in the package price). This type of lodge will provide food, although it may have a for-purchase restaurant. A standard lodge is destination lodge (fixed roof) that does not offer activities at an extra cost, although those activities may be easily accessible from the lodge. This type of lodge may offer food, within a package price or in a for-purchase restaurant.

[3] See, for example, *The Economic Value of Additional Spending by Fishing Clients of the Babine River Corridor Park* by Pacific Analytics Inc., January 2003 or the *Guide Outfitting Industry in BC: An Economic Analysis of 2002* by Pacific Analytics Inc., December 2003. Anglers on the Babine River spent an additional $0.407 at other locations in British Columbia for every dollar spent at Babine River lodges. Clients of Guide Outfitters spent an additional $0.157 at other locations in British Columbia for every dollar spent at Guide Outfitter lodges.

resulted in over $206.7 million going to government coffers, of which $78.5 million went to the provincial government.

- Nature-based businesses in British Columbia offer a multitude of activities (>30) to tourists in a natural environment. In fact, more than half (55%) of nature-based tourism businesses are dependent on fresh or salt water and the remaining 45% of businesses are dependant on land in British Columbia.

- A number of business characteristics were examined to provide a profile of businesses in the nature-based sector. In summary, nature-based businesses were most likely to:
    - Be small in size with less than three full time staff members,
    - Be in business for about sixteen years,
    - Employ more staff in the summer and fall than in the winter and spring,
    - Generate most of their revenue from guided activities,
    - Spend most of their revenues on labour and transportation and fuel,
    - Provide accommodation as part of a package available to guests,
    - Provide a nature-based tour guide or leader to their clients,
    - Generate the majority of bookings from repeat guests,
    - Use brochures / posters and their own website for the majority of their marketing,
    - Have a large proportion of clients from British Columbia or the United States,
    - Have a majority of clients that were male and middle-aged.

- Overall, most nature-based businesses indicated they grew in the past five years and were optimistic about growth in the next five years. In fact, businesses projected their revenue would grow by 34% between 2002 and 2007.

- By definition, this project **does not** describe characteristics of frontcountry nature-based experiences such as downhill skiing or golfing, or expenditures by individuals participating in non-commercial nature-based activities such as self-guided hiking and kayaking. Tourist expenditures before and after visiting nature-based tourism businesses and that of locals (non-tourists) that use nature-based tourism businesses are not included in the economic impact figures.

Table of Contents

Introduction

In 2001, 22.4 million tourists spent $9.2 billion dollars in British Columbia[4]. A substantial number of tourists who travel to British Columbia are attracted by the ***Super, Natural British Columbia®*** brand and enjoy nature-based activities. In the past decade in British Columbia, consumers have demonstrated a growing demand for all types of nature-based activities including outdoor/eco/adventure/wilderness activities. Generally, the nature-based sector of the tourism industry refers to those tourism experiences that are directly or indirectly dependent on the natural environment and require a land or water base to operate.

The Wilderness Tourism Association (WTA) secured funding from the provincial government to measure the size and characteristics of the commercial nature-based tourism industry in 2001. The primary objective of the project was to measure the economic impact of commercial nature-based tourism to the economy of British Columbia. The project was initiated in the spring of 2002 and was coordinated by Research Services, Tourism British Columbia on behalf of the Wilderness Tourism Association.

The project consisted of several components (Figure 1). First, an operational definition of commercial nature-based tourism was established. Second, a database of nature-based tourism businesses was developed. Third, information was collected from those nature-based tourism businesses through a short telephone survey followed by a more detailed mailback survey. Financial statements were also collected from a smaller number of businesses. In addition, information about tourism businesses was collected from a secondary data source (Workers Compensation Board). Fourth, all information was collated and analyzed to produce two reports. This report outlines the characteristics of commercial nature-based tourism in British Columbia. A previously published report describes the economic impacts of commercial nature based tourism in British Columbia in 2001.

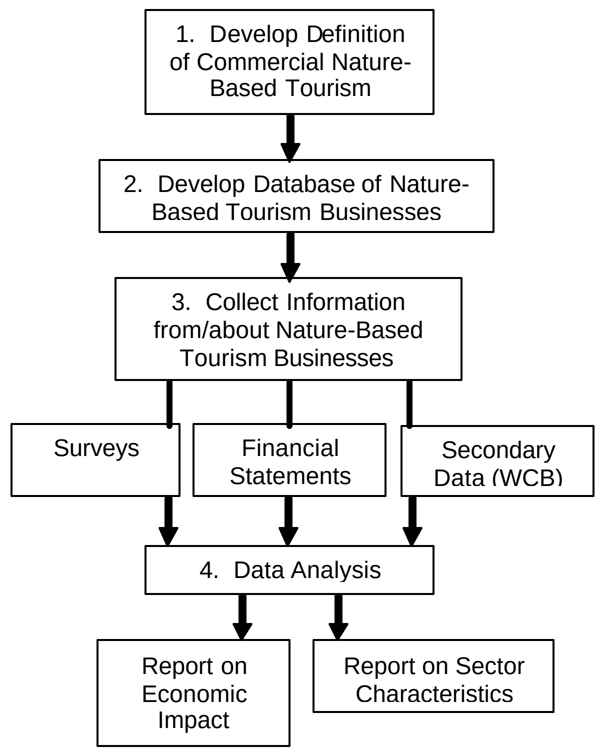


Figure 1. Components of the Commercial Nature-Based Tourism project.

[4] This study estimates the economic impacts of the commercial nature-based tourism industry in 2001. In 2003, 21.9 million tourists spent $9.0 billion dollars in British Columbia.

Methods

Research Services, Tourism British Columbia hired CGT Research International to develop an operational definition of commercial nature-based tourism, to build a database of nature-based tourism businesses and to collect information from nature-based tourism businesses. In addition, Jim Johnson, principal of Pacific Analytics used the database of nature-based tourism businesses, financial statements and other secondary data sources to estimate the economic impact of the sector. The Wilderness Tourism Association provided assistance to Tourism British Columbia through all components of the project.

Definition

In order to accurately identify nature-based tourism businesses, an operational definition of what constitutes nature-based tourism and nature-based tourism businesses was developed. The definition provided criteria that were used to classify businesses as part of the nature-based tourism population. The definition was developed with considerable input from the Wilderness Tourism Association executive and was reviewed by a group of nature-based tourism businesses.

Nature-based tourism refers to those tourism experiences that are directly or indirectly dependent on the natural environment and require a land or water base. The sector includes activities undertaken in mid and backcountry tourism zones[5] but excludes frontcountry experiences such as downhill skiing, golf or other destination resort activities. For the purposes of this study, tourism businesses must meet each of the following criteria to be considered a nature-based tourism business:

1. Businesses actively market products and services to tourists[6] who are engaging in nature-based activities.
2. Businesses' primary source of revenue is from clients, tourists or non-tourists, who are engaging in nature-based activities.
3. Businesses' primary function is not retail sales.
4. Businesses must be able to estimate the percentage of revenue generated from tourists.
5. Businesses provide products or services *related* to the activities included in the following list (Table 1). Activities that are **not** included in the following list are not considered nature-based under this definition (e.g. golf or downhill resort skiing). Depending upon the business's approach to providing their product or service, activities may fall within

[5] The frontcountry tourism zone services large volumes of tourists in a naturally scenic though substantially human altered environment. The midcountry tourism zone is characterized by the provision of recreation experiences for 'intermediate' numbers of visitors in a quality natural environment. The backcountry / wilderness tourism zone provides a high quality wilderness experience in a pristine environment to a smaller clientele (Source: Ethos Environmental).

[6] Tourists are travelers who are outside of their usual environment on an overnight trip of one night or more.

differing nature-based tourism sub sectors, e.g. a business running an inn may qualify if they actively market and provide nature-based activities to tourists.

Table 1. Activities included in the definition of commercial nature-based tourism.[1]

• Bird watching	• Freshwater fishing	• Riding all terrain vehicles (ATVs)
• Back country or tour skiing	• Guest ranch	• River tours
• Canoeing	• Hang-gliding or para-sailing	• Rock/ice climbing, mountaineering
• Cat skiing or cat snowboarding	• Heli-skiing/snowboarding	• Saltwater fishing
• Caving or spelunking	• Hiking or backpacking	• Scuba diving or snorkelling
• Cross country or skate skiing	• Horseback riding or trail riding	• Sea kayaking
• Cultural or historic tourism (nature-based)	• Hunting	• Snowmobiling
• Cycling or mountain biking	• Llama trekking	• Surfing
• Day sailing/windsurfing	• Multi-day yacht cruising	• Whale watching
• Dog sledding	• Power cruising	• White water kayaking
• Education (nature / outdoor)	• Rafting	• Wildlife/nature observation including photography

1. Transportation services (air, rail, bus, etc.) that do not offer additional nature-based activities were not included here.

Terminology

Throughout this report, the words 'sector' and 'sub-sector' are used. Sector refers to one activity-related component or product of the tourism industry. Thus, nature-based tourism is one sector of the British Columbian tourism industry. Sub-sectors are activities, experiences and businesses that fall within the nature-based sector such as, guide-outfitters (hunting) and ocean kayaking.

Database Development

After the definition was established, development of an inventory of businesses meeting the definition criteria was initiated. Over 20 lists from various government agencies, sector associations and marketing websites were used to establish an inventory of tourism businesses. The inventory was completed in order to estimate the size (or universe) of the sector and to establish a nature-based tourism businesses database (NBTB database). The NBTB database contains contact information such as the company name, contact name, email address, website address, mailing address, and phone and fax numbers of applicable businesses. Duplicate businesses were screened by company name and phone number and were removed from the NBTB database.

Data Collection

Using the contact information from the NBTB Database, a telephone survey of nature-based tourism businesses was conducted. Questions were designed to assess if each business met the above stated definition of commercial nature-based tourism. Information was also collected about the number of client days, primary client activities, employment levels and willingness to participate in future components of the study. In addition, businesses were asked to name other nature-based tourism businesses in their region which helped to ensure the NBTB Database was complete (see Appendix D for a copy of the telephone survey). A total 740 businesses completed the telephone survey, representing about 32% of nature-based tourism businesses in British Columbia. A follow-up mailback questionnaire collected more detailed information about business characteristics, client characteristics, barriers to growth revenue and revenue forecasts (see Appendix D for mailback survey). Two hundred and eighty (280) businesses completed the mailback questionnaire, which equalled a 40% response rate. Results from the mailback questionnaire represent 13% of all nature-based businesses in British Columbia. All data collected from the telephone and mailback surveys were entered into the NBTB Database for subsequent analysis.

Data Analysis

Data collected in the telephone and mailback surveys were analyzed to examine:

1. The general characteristics of the nature-based sector including economic impacts.
2. The characteristics of businesses within the nature-based sector.
3. Constraints to growth of the nature-based tourism industry.

Sector Characteristics

Economic impact results presented here summarize the results from ***The Value of Commercial Nature-Based Tourism Industry in British Columbia***. Excerpts that outline methods used to calculate economic impacts from that report can be found in Appendix A and Appendix C. Also, the number of businesses, revenues and client days are described for 20 sub-sectors within the nature-based tourism industry (see Table 4). The study design did not permit estimation of economic impacts by sub-sector or by tourism region.

Business Characteristics

Business characteristics were described using telephone and mailback survey data in the NBTB Database. All responses from the telephone and mailback survey were weighted or ‘grossed up’ to equal total revenue (calculated from the economic impact study) and client days (calculated using results from the telephone survey) by sub-sector. Then, general business characteristics including years in operation, staffing, facilities and services offered, marketing methods, client characteristics, growth in the past five years and the next five years were summarized using the ‘weighted data’.

Analysis was completed for business size and business performance in 2001. Business size was analyzed by creating three groups based on the average number of full time staff members per month. Small businesses have been defined as having less than 3 full time staff members, medium sized businesses between 3 and 10 full time staff members and large businesses more than 10 staff members. Staff members included themselves (person answering the survey, most likely the owner of the business) or other family members. Business performance was assessed by the percentage change in client days for 2001 over 2000. The average growth rate in client days was 14%, including businesses that reported their client days stayed the same or declined. Those businesses that had above average growth rate (> 14%) are referred to as 'above average'. Characteristics of the 'above average' businesses were summarized and compared to all businesses throughout the results section of this report.

Constraints to Growth

Unweighted data were used to summarize responses about constraints to growth for the industry. The mailback survey asked respondents to identify (from a list of 23) constraints to growth of the industry. Of that list of constraints, respondents were asked to indicate what they thought were the five most serious constraints.

Results

The results are summarized in three sections. The first outlines characteristics of the nature-based sector of the tourism industry as a whole, including economic impacts. The second outlines characteristics of businesses in the nature-based sector of the tourism industry and the third outlines constraints to growth of nature-based tourism businesses.

Sector Characteristics

Economic Impacts

In 2001, almost 966,000 tourists spent $908.9 million dollars while at nature-based tourism businesses in British Columbia (Table 2). When all spin-off impacts were considered, spending generated $1.55 billion in revenues and $783 million in Gross Domestic Product (GDP; see Appendix C for a discussion of direct, indirect and induced economic impacts). On average, when all spin-off impacts are accounted for, nature-based businesses generated $632 per client day for British Columbia in 2001. This resulted in over $207 million in government revenues, of which $110 million went to the federal government, $79 million to the provincial government and $18 million to municipal governments. These figures do not include client spending before and after their experience at nature-based tourism businesses. Previous research has demonstrated that this additional spending can be substantial which, if counted, could generate a substantially higher value of the commercial nature-based sector[7].

In addition, investment by existing nature-based tourism businesses directly increased provincial GDP by $7 million and by $11 million after accounting for all spin-off impacts (Table 2). After accounting for indirect and induced impacts, governments received an additional $0.93 million in taxes; the provincial government being better off by $0.42 million. This does not include investment in new businesses in 2001.

---

[7] See, for example, *The Economic Value of Additional Spending by Fishing Clients of the Babine River Corridor Park* by Pacific Analytics Inc., January 2003 or the *Guide Outfitting Industry in BC: An Economic Analysis of 2002* by Pacific Analytics Inc., December 2003. Anglers on the Babine River spent an additional $0.407 at other locations in British Columbia for every dollar spent at Babine River lodges. Clients of Guide Outfitters spent an additional $0.157 at other locations in British Columbia for every dollar spent at Guide Outfitter lodges.

Table 2. Client spending, revenues, GDP and federal, provincial and municipal taxes generated from operations and investment of nature-based tourism businesses.

	$ millions			
Operations	**Direct**	**Indirect**	**Induced**	**Total**
Client Spending	$908.85			
Revenues	$854.32	$445.60	$252.28	$1,552.19
GDP	$429.46	$213.34	$140.10	$782.90
Taxes -Total	$135.87	$46.45	$24.38	$206.69
Federal	$78.59	$20.07	$11.55	$110.21
Provincial	$49.30	$20.16	$9.04	$78.50
Municipal	$7.98	$6.22	$3.78	$17.98
Investment				
Investment	$30.68			
Revenues	$15.09	$5.48	$3.32	$23.90
GDP	$6.59	$2.88	$1.84	$11.32
Taxes -Total	$0.42	$0.17	$0.33	$0.93
Federal	$0.16	$0.46	$0.11	$0.32
Provincial	$0.18	$0.07	$0.16	$0.42
Municipal	$0.08	$0.05	$0.07	$0.19

Total employment resulting from commercial nature-based tourism activities in 2001 was 20,776 person years, which earned some $556 million in wages, salaries and benefits (Table 3). Total employment from investment by nature-based tourism businesses resulted in 213 jobs, which earned $7.7 million in wages, salaries and benefits. These economic impact results are excerpted from the report ***The Economic Impact of Commercial Nature-Based Tourism*** published in November 2004 by Tourism British Columbia in cooperation with Pacific Analytics. For more details the full report may be downloaded from www.tourismbc.com/research.

Table 3. Person years of employment and labour income generated from business operations and investment of in the nature-based sector of the tourism industry.

	Employment Impacts			
Operations	**Direct**	**Indirect**	**Induced**	**Total**
Person Years	13,927.5	4,434.8	2,413.6	20,775.9
Labour Income ($ millions)	$321.6	$146.9	$87.8	$556.3
Investment				
Person Years	130.3	50.6	31.8	212.6
Labour Income ($ millions)	$4.7	$1.9	$1.2	$7.7

Composition of the Industry

There are approximately 2,193 nature-based tourism businesses in British Columbia (Table 4). More than half of those businesses operate in the Vancouver Island, Victoria and the Gulf Islands (27%) or the Vancouver Coast and Mountains tourism regions (25%). A fifth of nature-based businesses

Table 4. The number and percentage of nature-based tourism businesses in each sub-sector by tourism region.

	Sub-Sector	Number (%) of Businesses (2001)	Percentage in each Tourism Region[6] VI	VCM	TO	CCC	KR	NBC
Lodge - Based	Comprehensive Lodges[1]	52 (2%)	24	10	12	18	22	16
	Standard Lodges[2,3]	43 (2%)	35	9	16	5	12	23
	Guest Ranches	71 (3%)	0	11	34	33	6	16
	Guide Outfitters	236 (11%)	7	5	9	20	13	47
Freshwater (FW) - Based	FW Fishing Lodges	145 (7%)	6	13	24	27	1	29
	FW Fishing (No Lodge)	116 (5%)	11	21	14	10	18	25
	River Rafting	79 (4%)	1	33	11	8	28	19
	FW Kayaking/Canoeing	40 (2%)	3	30	28	13	10	18
Marine – Saltwater (SW) Based	SW Fishing Lodges	132 (6%)	65	28	1	2	0	5
	SW Fishing (No Lodge)	71 (3%)	65	22	0	0	0	13
	SW (Ocean) Kayaking	137 (6%)	54	35	3	1	1	7
	Boat Charters *(most SW)*	298 (14%)	52	26	4	1	1	16
	Scuba Diving	54 (2%)	50	44	4	0	2	0
	Marine Wildlife Viewing	41 (2%)	90	5	0	0	0	5
	Sail Cruising	85 (4%)	46	35	6	1	2	10
	Pocket Cruising	10 (<1%)	20	70	10	0	0	0
Land Based - Summer & Winter	Land-Based Summer[4]	407 (19%)	16	31	12	8	14	18
	Mountain Biking	44 (2%)	9	56	16	2	12	5
	Land-Based Winter[5]	100 (5%)	0	28	21	2	44	5
	Heli-Skiing	32 (1%)	0	23	32	0	36	9
	Total	***2,193 (100%)***	***27%***	***25%***	***11%***	***9%***	***10%***	***18%***

1. Comprehensive Lodge = A destination lodge (fixed roof) that offers activities at an extra cost (which could be embedded in the package price). This type of lodge will provide food, although it may have a for-purchase restaurant.

2. Standard Lodge = A destination lodge (fixed roof) that does not offer activities at an extra cost, although those activities may be easily accessible from the lodge. This type of lodge may offer food, within a package price or in a for-purchase restaurant.

3. Simple Accommodation refers to establishments that do not provide any facilities other than accommodation. In non-urban regions, these businesses would include many motels and / or vacation rentals (houses and / or condos) that form an important link to nature-based tourism. It should be noted that the category "Simple Accommodation" are not destination lodges and have not been included in this analysis because at this time it was not possible to develop a comprehensive and accurate listing of all businesses. However, the NBTB Database may be enhanced to include these businesses in the future.

4. Land-based summer includes businesses that offer activities in the summer and are dependent on access to the land-base. These activities include cycling tours (other than Mtn. Biking), ATV experiences, bird-watching, nature-based cultural tourism, education, hang-gliding / para-sailing, hiking / backpacking, horseback riding, llama trekking, rock-climbing, day sailing and wildlife or nature observation including photography.

5. Land-based winter includes businesses that offer activities in the winter and are dependent on access to the land-base. These activities include back country ski touring, cross country skiing, winter education, snowmobiling and cat skiing / snowboarding

6. Tourism Region abbreviations are: VI=Vancouver Island, Victoria and the Gulf Island, VCM=Vancouver, Coast & Mountains, TO=Thompson Okanagan, CCC=Cariboo Chilcotin Coast, KR=Kootenay Rockies, NBC=Northern BC

operate in Northern BC (18%) and fewer operate in the Thompson Okanagan (11%), the Kootenay Rockies (10%) or the Cariboo Chilcotin Coast (9%) tourism regions. In fact, more than half (55%) of nature-based tourism businesses are dependent on fresh or salt water while the remaining 45% of businesses are dependant on land in British Columbia.

Businesses that provide recreational fishing opportunities comprise more than 20% (464 businesses) of all nature-based tourism businesses. Freshwater (FW) and saltwater (SW) fishing lodges account for 13% of all businesses. Businesses that offer land-based summer experiences (cycling tours, ATV experiences, bird-watching, nature-based cultural tourism, nature-based education, hang-gliding / para-sailing, hiking / backpacking, horseback riding, llama trekking, rock-climbing, day sailing, and wildlife or nature-observation including photography) comprise 19% of all businesses in the sector. Businesses that offer boat charters account for 14% nature-based tourism businesses. Businesses that offer ocean kayaking and winter experiences (heli-skiing, other land-based winter (backcountry ski touring, cross-country skiing, winter education, snowmobiling and cat skiing / snowboarding)) each accounted for six percent all nature-based tourism businesses.

In 2001, total revenues of nature-based tourism businesses equalled $854 million (Table 2). Saltwater lodges and Guide Outfitters each generated over 15% of those revenues (17% and 16%, respectively; Table 5). Comprehensive lodges, businesses that offer land-based summer activities and boat charter businesses each generated 9% of total revenues. Businesses that offer land-based winter products generated 8% of the total revenues and heli-skiing businesses generated 7% of revenues. Sail cruising generated 6% of total revenues of nature-based tourism. All other types of businesses earned less than 5% of total commercial nature-based tourism revenues.

A total of 2.5 million client days were generated by clients of nature-based tourism businesses in 2001. The distribution of client days by sub-sector differs slightly from the distribution of revenues by sub-sector. In 2001, businesses operating standard lodges generated 15% of client days, followed by freshwater fishing lodges and saltwater fishing lodges (10% each). A substantial number of client days were also generated by mountain biking and land-based winter businesses (9% each). Eight percent (8%) of nature-based client days were generated by comprehensive lodges and businesses offering river rafting. Businesses in other sub-sectors of the nature-based tourism industry generated fewer than six percent of all client days.

Table 5. The percentage of total revenue and client days by sub-sector.

		2001 Percent (%) of Commercial Nature-Based	
	Sub-Sector*	**Revenue**	**Client Days**
Lodge - Based	Comprehensive Lodge	9%	8%
	Standard Lodge	2%	15%
	Guest Ranch	4%	6%
	Guide Outfitters	16%	2%
Freshwater (FW) - Based	FW Fishing Lodges	4%	10%
	FW Fishing (No Lodge)	1%	1%
	River Rafting	2%	8%
	FW Kayaking/Canoeing	< 1%	< 1%
Marine – Saltwater (SW) Based	SW Fishing Lodges	17%	10%
	SW Fishing (No Lodge)	1%	3%
	SW (Ocean) Kayaking	3%	3%
	Boat Charters	9%	3%
	Scuba Diving	1%	2%
	Marine Wildlife Viewing	1%	3
	Sail Cruising	6%	3%
	Pocket Cruising	< 1%	< 1%
Land Based -Summer & Winter	Land-Based Summer	9%	2%
	Mountain Biking	< 1%	9%
	Land-Based Winter	8%	9%
	Heli-Skiing	7%	4%
	Total	***100%***	***100%***

Business Characteristics

Nature-based tourism businesses were analyzed by two characteristics, business size and business performance in 2001. In terms of size, businesses were categorized into three groups based on the average number of full time staff members per month (see page 8 for definition). Small businesses make up more than half of businesses (55%), medium sized businesses comprise 25% of businesses and large businesses comprise only 20% of businesses (Table 6).

In terms of business performance, respondents were asked if the number of client days had increased in 2001 over 2000. The average growth rate in client days was 14%, including those that declined or did not change. Fifty-two percent reported an increase in client days, 31% reported no change and 21% reported a decline. Overall 26% of businesses were 'above average' or had exceeded the average client day growth rates in 2001. The remainder, 74% were 'average' or were at or under the average client day growth rates in 2001. In subsequent analysis, those businesses that were above the average growth rate in 2001 are referred to as 'businesses that performed above average'. Characteristics of the 'above average' businesses are compared to all businesses throughout the remainder of this report.

Table 6. The percentage of average and above average businesses in each business size category.

Business Performance	Business Size Small	Medium	Large	Total
Average	76%	67%	79%	74%
Above Average	24%	34%	21%	26%
Total	***55%***	***25%***	***20%***	***100%***

Overall, nature-based tourism businesses reported offering services to clients for an average of 16 years (Table 7). Most (59%) have been in business for over ten years and only 11% have been in business for less five years. On average, medium and large businesses have been in business longer (19 years) than small businesses (14 years). Businesses that performed above average have not been operating (13 years) as long as businesses in general (16 years).

In 2001, 42% of nature-based businesses had at least one year-round staff person (including the person that responded to the survey and other family members, Table 7). On average, businesses had more part time staff (6 per month) than full time staff (3 per month). Just over half of businesses had at least one staff member in the winter months while the majority (almost 90%) of businesses had at least one staff member in the summer and fall months and almost 80% of businesses had at least one staff member in the spring months of March, April and May.

Small businesses were less likely than medium and large businesses to have staff that worked year-round. As expected, small businesses had fewer staff in the winter months compared to the spring, summer and fall months. Medium and large businesses were more likely to have staff on a year round basis (66% and 57%, respectively) but followed a similar seasonal trend in employment as small businesses. Businesses that performed above average had fewer full and part time staff (5.1 and 1.9 staff; respectively) than all businesses.

Table 7. The number of years in business, average part-time and full-time staff per month, percentage of businesses with staff working year round and percentage of businesses with staff in the fall, winter, spring and summer by business size and business performance (average %).

	Business Size			Above Average	
	Small	Medium	Large	Performance	Total
Years in Business					
1-5 years	18%	0%	7%	18%	11%
6-10 years	30%	34%	25%	41%	30%
11-15 years	23%	3%	13%	5%	16%
16-20 years	10%	10%	20%	12%	12%
21-25 years	9%	29%	18%	14%	16%
25+	10%	23%	16%	10%	15%
Average	13.8	19.3	18.9	12.7	16.2
Businesses with staff working year-round	26%	66%	57%	41%	42%
Average # part-time staff (per month)[1]	1.1	5.7	22.5	5.1	6.0
Average # of full-time staff (per month)[2]	0.8	2.1	8.3	1.9	2.8
Businesses with staff in each season:					
Fall (Sept., Oct, Nov.)	82%	92%	88%	89%	86%
Winter (Dec., Jan., Feb.)	42%	79%	65%	63%	56%
Spring (March, April, May)	71%	91%	88%	86%	79%
Summer (June, July, Aug.)	87%	92%	93%	41%	89%

1. A part time employee is a permanent or contract staff member who usually works fewer than 30 hours per week. Respondents were asked to include themselves, family members and any other staff members in their counts.
2. A full time employee is a permanent of contract staff member who usually works 30 hours or more per week. Respondents were asked to include themselves, family members and any other staff members in their counts.

Revenues and Expenses

Overall, nature-based businesses collected $854 million directly in revenue from tourist clients in 2001 (Table 2). On average, 88% of revenue was generated by tourist clients[8]. Small businesses earned 88% of their revenue from tourist clients, medium sized businesses earned 94% of their income from tourist clients and large businesses earned 83% of their income from tourist clients. Businesses that performed above average earned 95% of their revenue from tourist clients, which exceeded the average of 88% for all businesses.

Overall, more than half of revenues earned by nature-based tourism businesses were generated from guided activities and a quarter was generated from all-inclusive plans (Table 8). A smaller proportion of revenues were generated from accommodations and self-guided activities (equipment rental). On average, less than 5% of revenues were generated from meals (food and beverage), other

[8] See definition of tourist client on page 4.

items or merchandise. In terms of business size, small businesses were more dependent on guided activities to generate their revenue compared to medium and large businesses. Businesses that performed above average were similar to other businesses in how they generated their revenues.

Table 8. 2001 revenue generated in by category, business size and business performance (average %).

	Business Size			Above Average	
Revenue Categories	**Small**	**Medium**	**Large**	**Performance**	**Total**
Guided Activities	62%	39%	38%	53%	52%
Self-Guided (Equipment Rental)	6%	10%	2%	6%	6%
Accommodation	8%	10%	12%	11%	9%
Meals (Food and Beverage)	2%	3%	5%	2%	3%
Merchandise	1%	3%	3%	2%	2%
All Inclusive[1]	18%	31%	39%	25%	25%
Other[2]	3%	4%	1%	2%	3%

1. This category was used by businesses that could not break out the revenue by categories including; guided activities, meals and / or accommodation.
2. Other included ; transportation, commissions, instruction, massage and non-tourism related.

In terms of expenditures, businesses spent an average of 22% of revenues on labour, 15% on transportation and fuel, 11% on maintenance of existing facilities, 10% on other costs and 9% on advertising and promotional activities or purchasing new facilities or equipment (Table 9). Less was spent on food and beverage (8%), liability insurance (6%)[9], mortgage and rent (5%), amortization (3%), and interest (1%). Amortization (depreciation of assets) and interest were included in the calculation of total expenses. Overall, medium and large businesses spent relatively more on labour than small businesses. Businesses that performed above average were similar to other businesses in their expenditure patterns.

[9] A separate report has been written on the costs of liability insurance for water-based tourism operators. *Water Based Tourism Operators Marine Liability Survey-Preliminary Results* can be obtained on the Council of Tourism Associations website www.cotabac.com / publications.

Table 9. Revenues spent on each expense category by business size and business performance (average %).

Expense Categories	Business Size			Above Average	Total
	Small	Medium	Large	Performance	
Labour	17%	31%	29%	20%	22%
Advertising and Promotional Activities[1]	10%	6%	8%	11%	9%
Liability Insurance	7%	3%	6%	5%	6%
New Facilities and/or Equipment	10%	8%	8%	14%	9%
Maintenance of Existing Facilities and/or Equipment	13%	7%	13%	10%	11%
Mortgage and Rent	5%	5%	4%	5%	5%
Transportation and Fuel (guest-related freight)	16%	12%	13%	14%	15%
Food and Beverage	7%	10%	8%	8%	8%
Interest	3%	3%	0%	2%	2%
Amortization (depreciation of assets)	3%	4%	3%	3%	3%
All Other Expenses	11%	9%	5%	7%	10%

1. Does not include labour to produce advertising and promotional activities.

Operating expenses were subtracted from revenues of individual businesses to describe yearly profit margins. Most businesses (70%) had revenues that exceeded expenses, whereas 26% of businesses had higher expenses than revenues and 4% had revenues that matched expenses. Sixty-five percent (65%) of small businesses had revenues that exceeded expenses, whereas 83% of medium sized businesses and 60% of large businesses had revenues that exceeded expenses. Sixty-nine percent of businesses that performed above average had revenues that exceeded expenses, which was similar to all businesses.

Businesses were asked to estimate the market value of all their physical and financial assets. On average, nature-based businesses had $1.1 million in assets. Small businesses had an average of $339,000 of assets, medium sized businesses had $1.6 million and large businesses had $2.6 million in assets. Businesses that performed above average had an average of $1.5 million in assets, which was slightly more than the average of businesses overall ($1.1 million).

Facilities and Services

About half of nature-based tourism businesses owned accommodation, 14% rented/leased accommodation, 15% partnered with another business to provide accommodation and 18% of businesses did not provide accommodations (Table 10). Medium and large sized businesses were more likely to own or rent their accommodation whereas small businesses were more likely to partner with other businesses to provide accommodations to clients. Businesses that performed above average were more likely to have accommodation that was rented/leased or provided by another business than businesses overall.

Of all businesses that owned or rented accommodation, almost half (42%) provided clients with cabins and cottages or lodges and inns. Fewer (24%) had sites for tents/tepees/campsites, a boat/dock

(19%) or hotels / motels (15%). Others offered trailers (7%) or a bed and breakfast (6%). Not surprisingly, small businesses were more likely to have small accommodation properties like bed and breakfasts, cabins and cottages or tent sites than medium and large businesses. Businesses that performed above average were more likely than other businesses to have a bed and breakfast or a hotel / motel and less likely to have a cabin or cottage than businesses in general.

Table 10. The percentage of businesses that have accommodation facilities and of those, the type of accommodation by business size and business performance.

Facilities	Business Size: Small	Business Size: Medium	Business Size: Large	Above Average Performance	Total
Accommodation Facilities					
Owned accommodation	47%	60%	68%	50%	54%
Rented/leased accommodation	11%	19%	17%	18%	14%
Partnered with another business to provide accommodation	23%	2%	6%	21%	15%
Accommodation not provided	20%	19%	9%	11%	18%
Accommodation Types (% of total that owned/rented accommodation)					
Bed and Breakfast	11%	3%	2%	13%	6%
Boats/Docks	26%	21%	2%	18%	19%
Cabins and Cottages	47%	37%	38%	26%	42%
Hotels and Motels	12%	20%	14%	25%	15%
Lodges and Inns	24%	41%	80%	32%	42%
Tents/Campsites/Tepees	36%	18%	6%	17%	24%
Trailers	13%	2%	4%	5%	7%
Other[1]	2%	3%	2%	2%	2%

1. Other included treehouses, hostels, condos

Businesses with accommodation averaged 28 rooms or sites in capacity (Table 11). Bed and breakfasts averaged 6 rooms and businesses with cabins and cottages had an average of eight structures. Lodges and inns had an average of 19 rooms. Hotels and motels had the highest average room count with 41. As expected, small businesses had less room capacity than medium or large businesses. Businesses that were above average had less capacity (20 rooms or sites) than businesses overall (28 rooms or sites).

Table 11. The average number of rooms or sites for each accommodation type by business size and business performance.

Average # Room/Site Accommodation Type	Business Size Small	Medium	Large	Above Average Performance	Total
Bed and Breakfast	5.3	6.4	5.9	4.5	5.5
Boats/Docks	5.5	46.7	24.0	44.2	22.1
Cabins and Cottages	7.1	7.7	12.1	4.2	8.3
Hotels and Motels	17.3	59.0	40.0	61.8	40.7
Lodges and Inns	8.8	12.7	31.7	24.7	19.1
Tents/Campsites/Tepees	8.6	102.9	39.5	8.8	30.2
Trailers	4.5	17.0	10.0	2.0	5.5
Other	6.0	9.0	-	8.8	7.3
Total	***7.7***	***22.7***	***24.9***	***20.0***	***27.6***

To learn about guest services offered in the immediate area and those provided by the nature-based business the mailback survey asked, *What services were available to guests in the immediate area?* and *Of those, what services were provided by your business?* Overall, more than 80% of businesses had a nature-based tour guide or leader available to guests in the immediate area (Table 12). Most (73%) had transportation services, a gift shop or merchandise (67%), utilities (water, electricity, showers, washrooms - 67%), and a restaurant (62%). Less than half had convenience facilities (laundromat, convenience store-49%), equipment sales or rentals (46%) or luxury amenities (whirlpool, swimming pool, hot tub, sauna-46%) available to guests. A larger proportion of medium and large businesses had services like a restaurant, gift shop or merchandise and luxury amenities available to guests than small businesses. Similarly, a larger proportion of businesses that performed above average had services such as a restaurant, gift shop, convenience facilities, equipment sales and rentals, nature-based tour guides, luxury amenities and value-added joint programming available to their guests than businesses overall.

Table 12. The percentage of businesses that have each of the following services available to their guests by business size and business performance.

Services Available to Guests	Business Size Small	Medium	Large	Above Average Performance	Total
Restaurant	61%	55%	75%	80%	62%
Gift Shop or Merchandise	59%	74%	80%	77%	67%
Convenience Facilities	55%	36%	48%	61%	49%
Equipment Sales/Rentals	46%	47%	43%	66%	46%
Nature-Based Tour Guide/Tour Leader	82%	80%	80%	93%	82%
Utilities	65%	79%	58%	66%	67%
Luxury Amenities *(whirlpool, swimming pool, hot tub, sauna)*	39%	49%	64%	61%	46%
Transportation Services	75%	72%	73%	83%	73%
Value Added or Joint Programming *(performing arts, aboriginal culture, regional cuisine)*	32%	34%	38%	62%	34%
Other[1]	1%	6%	0%	0%	2%

Of guest services available in the immediate area, nature-based businesses were most likely to provide (as part of their business) a nature-based tour guide/leader (84%), utilities (53%) or transportation services (50%; Table 13). Fewer ran a gift shop (40%) or provided equipment rental and sales (39%) as part of their business. A smaller proportion of businesses (< 30%) provided luxury amenities, a restaurant, value-added joint programming or other convenience facilities. Large businesses were more likely to provide guest services as part of the business compared to small businesses. Also, businesses that performed above average were more likely to offer equipment sales, luxury amenities, transportation services or value added or joint programming than businesses overall.

Table 13. The percentage of businesses offering each available service by business size and business performance.

Services Available to Guests Provided by Your Business?	Business Size Small	Medium	Large	Above Average Performance	Total
Restaurant	12%	31%	62%	32%	27%
Gift Shop or Merchandise	23%	55%	67%	43%	40%
Convenience Facilities	10%	10%	28%	15%	13%
Equipment Sales/Rentals	29%	52%	50%	51%	39%
Nature-Based Tour Guide/Tour Leader	82%	87%	85%	88%	84%
Utilities	43%	74%	55%	44%	53%
Luxury Amenities (whirlpool, swimming pool, hot tub, sauna)	16%	40%	53%	36%	30%
Transportation Services	44%	64%	50%	65%	50%
Value Added or Joint Programming	10%	19%	22%	32%	15%
Other	9%	10%	2%	3%	8%

Marketing

Businesses were asked to estimate what percentage of total bookings came from repeat guests, word of mouth, drive by/walk in, marketing or other sources. Overall, businesses reported that on average, 39% of bookings were due to repeat business, 29% came from marketing and 23% were from word of mouth (Table 14). Fewer (5%) were from drive by/walk in business or other methods (4%). Small businesses indicated that a higher proportion of their bookings came from marketing than medium or large businesses. Also, businesses that performed above average were more likely to have a higher proportion of their bookings due to marketing than other businesses.

Table 14. Bookings that came from repeat guests, word of mouth, drive by/walk in or marketing methods by business size and business performance (average %).

	Business Size			Above Average	
Bookings that came from:	**Small**	**Medium**	**Large**	**Performance**	**Total**
Repeat Guests	33%	50%	41%	38%	39%
Word of Mouth	24%	20%	22%	19%	23%
Drive By/Walk In	6%	2%	4%	4%	5%
Marketing	32%	24%	26%	34%	29%
Other	3%	4%	7%	6%	4%

Businesses were asked what kinds of marketing methods they used in 2001, the percentage of their total marketing budget that was allocated to each method and their participation in co-operative programs. On average, businesses responded that they used three (3.2) different marketing methods with small businesses using fewer marketing methods (2.6) than medium (3.9) or large businesses (3.7). Businesses that performed above average used more marketing methods (3.6) than businesses in general (3.2).

The majority (84%) of businesses used brochures/posters and their own website (77%) for marketing (Table 15). About half used direct mail to past customers (54%), consumer trade shows (52%), other websites (47%), Provincial travel guides (46%) or magazine ads (45%). Fewer used direct mail to future prospects (37%), public relations (30%), wholesale operators (30%), travel agents (27%), email promotions (27%) or newspaper ads (22%). Small businesses were less likely to use marketing methods other than brochures/posters and their own website compared to medium and large businesses. Above average businesses were more likely to have used almost all marketing methods than businesses in general.

Table 15. The percentage of businesses that used each marketing method in 2001 by business size and business performance.

Marketing Method -% of Businesses	Business Size Small	Medium	Large	Above Average Performance	Total
Brochures, Posters	84%	89%	78%	91%	84%
Own Website	75%	85%	73%	91%	77%
Direct Mail to Past Customers	45%	73%	55%	56%	54%
Consumer Trade Shows	41%	65%	65%	55%	52%
Another Website	52%	46%	33%	60%	47%
Provincial/Territorial Travel Guides	47%	39%	50%	46%	46%
Magazine Ads	32%	70%	52%	54%	45%
Direct Mail to Future Prospects	28%	53%	41%	46%	37%
Public Relations	21%	47%	48%	44%	33%
Wholesale Operators	16%	41%	56%	42%	30%
Travel Agents	16%	38%	43%	38%	27%
Email Promotions	24%	30%	29%	35%	27%
Newspaper Ads	20%	20%	29%	34%	22%
Commercial Travel Guide	13%	21%	18%	29%	16%
Other	16%	36%	29%	8%	15%
Film Shows, Slide Shows	6%	13%	27%	18%	12%
Radio or Television Ads	4%	24%	17%	25%	11%
None	1%	5%	0%	0%	1%

On average, businesses allocated the highest proportion of their marketing budget to brochures/posters, websites and consumer trade shows (Table 16). Small businesses used a higher proportion of marketing budgets for brochures/posters and websites than medium and large businesses. This may be attributed to smaller marketing budgets for small businesses compared to other businesses. Businesses that performed above average allocated relatively less of their marketing budget to consumer trade shows and more to their own website than businesses overall. Businesses were asked what percentages of their bookings were attributed to each marketing method. Unfortunately, there were not enough responses to accurately report what booking method yielded the highest results.

Table 16. Total marketing budget used in 2001 for each marketing method by business size and business performance (average %).

Marketing Method - % of Marketing Budget	Business Size Small	Medium	Large	Above Average Performance	Total
Brochures, Posters	25%	14%	22%	19%	22%
Own Website	19%	13%	8%	25%	17%
Consumer Trade Shows	14%	20%	4%	5%	14%
Magazine Ads	9%	15%	6%	10%	10%
Provincial/Territorial Travel Guides	8%	3%	16%	5%	8%
Direct Mail to Past Customers	4%	5%	9%	5%	5%
Another Website	4%	5%	1%	3%	4%
Email Promotions	3%	2%	4%	5%	3%
Public Relations	1%	2%	15%	3%	3%
Travel Agents	1%	2%	3%	2%	2%
Direct Mail to Future Prospects	2%	3%	4%	3%	2%
Newspaper Ads	3%	2%	3%	4%	2%
Commercial Travel Guide	2%	1%	2%	2%	2%
Wholesale Operators	1%	1%	4%	2%	1%
Film Shows, Slide Shows	0%	1%	0%	1%	0%
Radio or Television Ads	0%	1%	0%	1%	0%
Other	5%	10%	0%	3%	0%
None	0%	0%	0%	0%	0%

Overall, about half of businesses participated in co-operative marketing programs. Forty-five percent (45%) of small businesses, 60% of medium and 51% of large businesses participated in co-operative marketing programs. More businesses that performed above average (70%) participated in co-operative marketing programs than businesses in general (45%).

Half of businesses that participated in co-operative marketing programs indicated they partnered with an industry association. Fewer participated in marketing programs with municipal and regional associations (39%), other adventure companies (36%), and special events (36%; Table 17). About a fifth of businesses participated in marketing programs with national or provincial associations (21%). Large businesses were more likely to participate in co-operative marketing programs with special events, national and provincial associations, international accommodation companies and Canadian and International passenger transportation companies than medium and small businesses. Businesses that performed above average were more likely to participate in co-operative marketing programs with other adventure companies, special events and trade organisations and less likely to participate in programs with municipal and regional association businesses overall.

Table 17. The percentage of businesses that participated in each type of co-operative marketing program by business size and business performance.

	Business Size			Above Average	
Type of co-operative marketing activity	Small	Medium	Large	Performance	Total
Industry Associations (e.g. Sport Fishing Institute)	39%	69%	47%	46%	50%
Municipal or Regional Associations (e.g. Tourism Victoria)	43%	36%	34%	36%	39%
Other Adventure Companies	34%	37%	38%	46%	36%
Special Events	24%	36%	65%	52%	36%
Trade Organisations	16%	44%	40%	43%	29%
National or Provincial Associations (e.g. Tourism BC)	15%	16%	40%	22%	21%
Canadian Accommodation Companies	21%	11%	15%	17%	17%
International Accommodation Companies	3%	8%	25%	13%	9%
Canadian Passenger Transportation Companies	5%	0%	12%	3%	5%
International Passenger Transportation Companies	2%	0%	12%	6%	3%
Other	4%	0%	1%	4%	2%

The Clientele

When asked about the market origin of their clients, on average, businesses reported most guests were from British Columbia (29%), north-western United States (17%) the United States (other than the north-west; 13%) and Alberta (10%; Table 18). Medium sized businesses had fewer clients from British Columbia but more clients from the United States (north-west and other) than small and large businesses. Businesses that performed above average had a higher proportion of travelers from the United States than other businesses.

Table 18. Client origin by business size and business performance (average %).

	Business Size			Above Average	
Market	Small	Medium	Large	Performance	Total
British Columbia	31%	18%	38%	22%	29%
Alberta	11%	10%	7%	12%	10%
Ontario	3%	3%	2%	2%	3%
Quebec	0%	0%	0%	0%	<1%
Other Canada	2%	3%	2%	5%	3%
North-western US[1]	15%	17%	13%	18%	17%
California	4%	11%	7%	6%	5%
Other US	8%	24%	12%	18%	13%
United Kingdom	4%	4%	9%	7%	5%
Germany	5%	3%	2%	3%	4%
Other Europe	5%	6%	4%	2%	5%
Asia	3%	1%	3%	4%	2%
Other	8%	1%	1%	0%	5%

1. North-western US includes Washington, Oregon, Idaho, Montana and Alaska.

Businesses also indicated which five markets were most likely to have the strongest growth in the next five years. Overall, more than half of businesses (54%) indicated the north-western United States was a strong growth market followed by the British Columbia resident market, United States (other than the north-west) and Alberta (Table 19). Generally, strong growth markets were currently large markets for nature-based businesses. A higher proportion of large businesses anticipated growth in the United States market than small or medium sized businesses. Businesses that performed above average were more likely to indicate that Other Canada, the United Kingdom and Asia were strong growth markets compared to other businesses overall.

Table 19. The percentage indicating strongest growth markets by business size and business performance.

	Business Size			Above Average	
Strongest Growth Markets	**Small**	**Medium**	**Large**	**Performance**	**Total**
British Columbia	64%	32%	58%	58%	54%
Alberta	48%	32%	58%	29%	39%
Ontario	16%	21%	15%	12%	16%
Quebec	0%	4%	0	0%	1%
Other Canada	15%	12%	10%	31%	20%
North-western US	61%	55%	88%	74%	72%
California	27%	43%	62%	32%	39%
Other US	36%	44%	63%	43%	43%
United Kingdom	16%	22%	37%	41%	28%
Germany	25%	25%	13%	19%	19%
Other Europe	25%	18%	13%	15%	16%
Asia	17%	10%	17%	31%	17%
Other	17%	21%	6%	8%	9%

In terms of demographics, clients of nature-based tourism businesses were mainly male and middle-aged (Table 20). Clients were most likely to be traveling as a couple or with friends and family. Client characteristics varied little between business sizes. Client characteristics of businesses that performed above average were also similar to those of businesses in general.

Table 20. Client characteristics (gender, age and travel party) by businesses size and business performance (average %).

	Business Size			Above Average	
Gender	**Small**	**Medium**	**Large**	**Performance**	**Total**
Male	62%	65%	60%	60%	62%
Female	39%	36%	40%	41%	38%
Age					
< 19 Years	6%	6%	7%	6%	6%
20-24 Years	12%	4%	7%	4%	9%
25-34 Years	13%	12%	14%	13%	13%
35-44 Years	22%	23%	25%	24%	23%
45-54 Years	23%	33%	26%	30%	26%
55-64 Years	16%	16%	16%	17%	16%
65 Years or Older	8%	7%	6%	6%	7%
Traveler Party					
Individual	11%	16%	13%	18%	14%
Couples	24%	25%	37%	26%	27%
Families	22%	15%	14%	23%	19%
Friends	15%	31%	14%	19%	18%
Tour Group	20%	5%	7%	5%	14%
Business/Incentive	5%	9%	10%	7%	7%
Other	1%	0%	5%	2%	1%

General Growth

Businesses were asked, *has your business increased, decreased or stayed about the same in the past 5 years (since 1997)?* The majority (69%) of respondents reported their business had increased, 16% replied it stayed about the same and 14% reported a decline in business (Figure 1). Businesses were also asked, *in the next five years do you expect your business to increase, decrease or stay about the same?* Similar to responses for the past five years, most anticipated their business would grow, fewer replied their business would stay the same and only four percent thought their business would decline in the next five years (Figure 1).

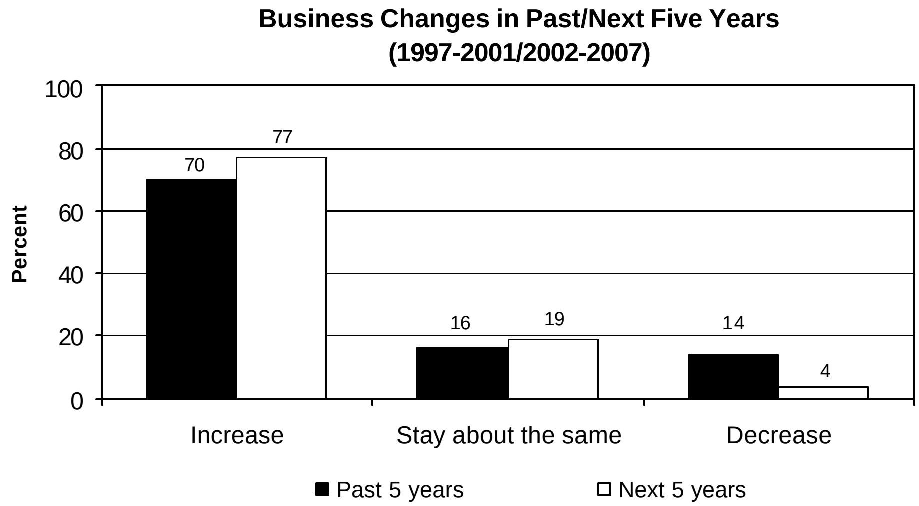


Figure 1. The percentage of respondents, whose business had increased, stayed the same or decreased in the past five years (1997-2001) and how they expect it to change in the next five years (2002-2007).

Fewer small businesses (67%) indicated their business had increased in the past five years than medium (73%) or large (80%) businesses (Table 21). Not surprisingly, businesses that performed above average were more likely to have increased their business in the past five years and were more optimistic for the next five years. Eighty-three percent (83%) reported they thought their business would grow in the next five years compared to 77% of all businesses.

Table 21. The percentage of respondents, whose business had increased, stayed the same or decreased in the last five years and in the next five years by business size and business performance.

Business changes	Business Size			Above Average	
in the past 5 years?	Small	Medium	Large	Performance	Total
Increased	67%	73%	80%	90%	70%
Stayed the Same	20%	12%	8%	8%	16%
Decreased	13%	14%	12%	2%	14%
in the next 5 years?					
Increase	76%	78%	72%	83%	77%
Stay the Same	21%	16%	26%	16%	19%
Decrease	3%	6%	2%	1%	4%

Businesses that replied they had grown in the past five years were asked, *how has your business grown in the past five years (since 1997 or since opening, if operating less than 5 years)?* Most nature-based businesses responded that their business had grown by increasing volume during the peak season (62%) and / or by increasing revenues (59%; Figure 2). About half of businesses indicated their growth was by increasing volume during their shoulder season (49%), fewer hired more staff (43%) and a third indicated they grew by offering new activities (33%). On average, large businesses were more likely to indicate they grew in more ways (3.7) than medium (2.9) and small businesses (2.4). As well, a higher proportion of large businesses indicated they had grown by all ways than small businesses (Table 22). Similarly, those businesses that were above average in business performance in 2001 were more likely to have grown in all ways than businesses overall.

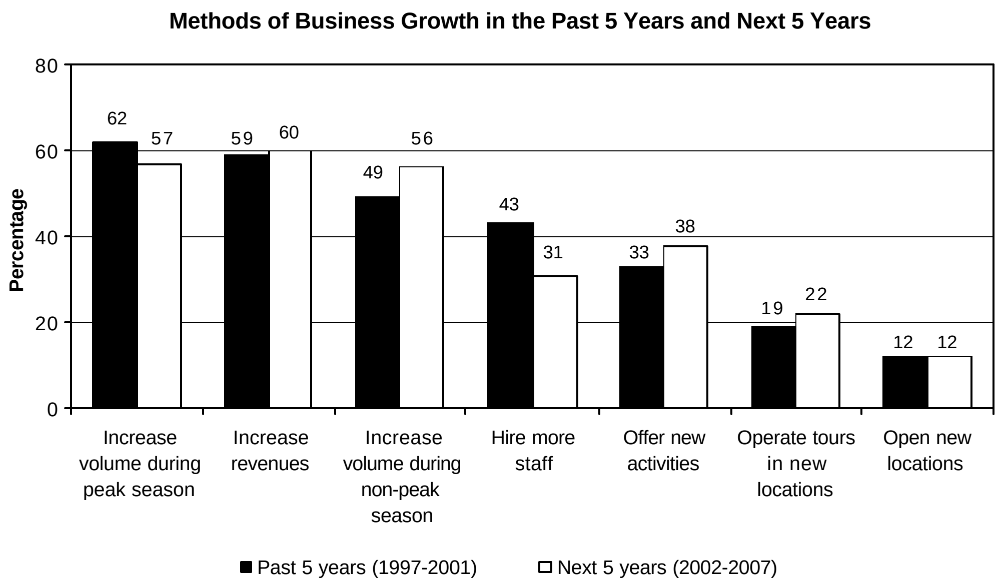


Figure 2. Methods of business growth in the past five years and the next five years (average %)

Businesses that indicated they were likely to grow in the next five years were asked, *in what ways do you expect your business to grow in the next five years (2002-2007)?* Responses followed a similar pattern to growth methods in the past five years, with a few exceptions. Specifically, a higher proportion of businesses thought they would increase their volume during the non-peak season in the next five years compared to the past five years (Figure 2, Table 23). Fewer businesses expected to hire more staff in the next five years compared to the past five years. Also, a smaller proportion of businesses expected to offer new activities, operate tours in new locations or open new locations. Large businesses expected that they would grow in more ways (3.3) than small businesses (2.5). Also, businesses that had above average growth in 2001 were likely to indicate they would grow in more ways (3.9) than businesses overall (2.9).

Table 22. The percentage of respondents that indicated how their business has changed in the past five years by business size and business performance.

How has your business grown in the past 5 years?	Business Size Small	Medium	Large	Above Average Performance	Total
Increased volume during peak season	61%	51%	80%	78%	62%
Increased revenues	53%	68%	62%	81%	59%
Increased volume during non-peak season	38%	59%	69%	59%	49%
Hired more staff	30%	59%	56%	68%	43%
Offered new activities	29%	30%	50%	45%	33%
Opened new locations	9%	10%	23%	18%	12%
Operated tours in new locations	18%	16%	27%	43%	19%
Other	1%	1%	0%	2%	1%
None	3%	0%	0%	0%	2%

Table 23. The percentage of respondents that indicated how they think their business will change in the next five years by business size and business performance.

Has will your business grow in the next 5 years?	Business Size Small	Medium	Large	Above Average Performance	Total
Increase revenues	56%	67%	65%	81%	60%
Increase volume during peak season	59%	44%	70%	70%	57%
Increase volume during non-peak season	47%	68%	64%	76%	56%
Offer new activities	37%	42%	37%	46%	38%
Hire more staff	20%	51%	33%	54%	31%
Operate tours in new locations	20%	25%	26%	41%	22%
Open new locations	5%	19%	26%	22%	12%
Other	4%	7%	7%	6%	6%

Revenue Growth

Businesses were asked how revenue had grown in the past five years and how they anticipated revenue to grow in the next five years. Overall, revenue grew by an average of 48% in the past five years. Larger businesses experienced more revenue growth (59%) than medium (52%) and small businesses (43%). As expected, businesses that performed above average experienced growth in revenues of 65% which is significantly higher than the overall average of 48%.

When asked about revenue growth in the future, businesses expected lower growth rates than in the recent past. Businesses expected their revenue would grow by about 34% over the next five years. In contrast to the trend in revenue growth over the past five years, smaller businesses expect their revenue will grow more (36%) than medium (32%) or large (28%) businesses. Also, businesses that performed above average expect a 34% growth rate in the future which was similar to businesses overall.

Constraints to Growth

Businesses were asked to consider what constraints (from a list of 23) would have an impact on their long term growth (see Table 24). Then, from that list, businesses were asked which the five most serious constraints to growth. From the list of 23, on average, businesses indicated six constraints to growth. More than half of respondents replied that there was too much industry regulation, there was a lack of long term guarantee of tenuring of the land base and that there was competition for nature resources among multiple industries. Fewer indicated high marketing costs and the lack of security regarding long term integrity of viewscapes as constraints.

Almost one quarter of respondents indicated that a lack of long term guarantee of tenuring to the land base and too much industry regulation were the **most serious** constraints to long term growth (Table 24). Competition for natural resources among multiple industries and limited or poor air access were the most serious constraints for 20% of respondents. Most respondents (16%) indicated that the lack of industry regulation and difficulty in accessing capitals dollars for expansion were serious constraints.

Respondents were asked how to address the constraints they identified. A total of 134 respondents made 215 suggestions. Most suggestions were about methods of improving land use/tenure issues (36%), followed by government regulation (19%) and suggestions for improving marketing or business development (16%) and transportation (11%). Fewer made suggestions about insurance (6%), other issues (4%), human resources (4%), financing (2%) or weather (2%). Suggestions are listed in Appendix B.

General Comments

Respondents were asked if they would like to comment on anything else about their business or this study. Sixty-five comments were made. Most were about specific business issues (35%) or the research methods of this study (28%). Fewer comments were about government regulation (12%), marketing (8%), fisheries/fishing related (8%), land tenures (5%), the Marine Liability Act (3%). Specific comments are outlined in Appendix B.

Table 24. The percentage of items marked as a constraint and the percentage of items marked as serious constraints.

Constraint	Percent of respondents that indicated: This is a constraint	This is a Serious Constraint
Too much industry regulation	59%	23%
Lack of long term guarantee of tenuring to the land base	51%	24%
Competition for natural resources among multiple industries	51%	20%
High marketing costs	48%	15%
Lack of security regarding long term integrity of viewscapes	44%	11%
Difficult to secure insurance	39%	11%
Weather constraints	39%	11%
Limited or poor air access	36%	18%
Travel safety concerns	34%	11%
Difficulty in accessing capital dollars for expansion	32%	16%
Price competition	28%	13%
Finding staff with adequate training	27%	5%
Limited or poor ground access	26%	11%
Lack of long term access to the land base via forestry roads and trails	24%	15%
Retaining staff with adequate training	23%	8%
Other constraints	17%	19%
Lack of industry regulation	14%	16%
Lack of market research	12%	7%
Lack of accommodation facilities	12%	4%
Difficulty in finding partners	9%	0%
Inadequate staff performance	9%	0%
Poor quality accommodations	6%	0%
Lack of technology services	6%	8%

Summary

This project revealed that the nature-based sector of the tourism industry in British Columbia contributes significantly to the Provincial economy. It represents more than two-thousand small and medium sized businesses and generated over 20,000 person years of employment annually. When all spin-off impacts were considered, nature-based tourism businesses generated $1.55 billion in revenues and $783 million in Gross Domestic Product (GDP) for British Columbia in 2001. On average, when all spin-off impacts are accounted for, nature-based businesses generated $632 per client day for British Columbia in 2001. These figures do not include client spending before and after their experience at nature-based tourism businesses. Previous research has demonstrated that this additional spending can be substantial which, if counted, could generate a substantially higher value of the commercial nature-based sector[10].

Nature-based businesses in British Columbia offer a multitude of activities (>30) to tourists in a natural environment. In fact, 55% of businesses are dependent on the water resources and fewer (45%) are dependent on the land resources in the province.

A number of business characteristics were examined to provide a profile of businesses in the nature-based sector. In summary, nature-based businesses were most likely to:

- Be small in size with < 3 full time staff members,
- Be in business for about 16 years,
- Employ more staff in the summer and fall than in the winter and spring,
- Generate most of their revenue from guided activities,
- Spend most of their revenues on labour and transportation and fuel,
- Provide accommodation as part of a package available to guests,
- Provide a nature-based tour guide or leader to their clients,
- Generate the majority of bookings from repeat guests,
- Use brochures / posters and their own website for the majority of their marketing,
- Have a large proportion of clients from British Columbia or the United States,
- Have a majority of clients that were male and middle-aged.

[10] See, for example, *The Economic Value of Additional Spending by Fishing Clients of the Babine River Corridor Park* by Pacific Analytics Inc., January 2003 or the *Guide Outfitting Industry in BC: An Economic Analysis of 2002* by Pacific Analytics Inc., December 2003. Anglers on the Babine River spent an additional 28.9% or $0.407 at other locations in British Columbia for every dollar spent at Babine River lodges. Clients of Guide Outfitters spent an additional 13.5% or $0.157 at other locations in British Columbia for every dollar spent at Guide Outiffiter lodges.

The most successful nature-based businesses (grew faster than average in client days in 2001) were more likely than other nature-based businesses to:

- Have fewer part and full-time staff per month,
- Have almost all of their revenues generated from tourist clients,
- Have more physical and financial assets,
- Provide accommodation to clients that was rented/leased or provided by another business,
- Provide accommodation that was a bed and breakfast or a hotel/motel,
- Have more bookings that came as result of marketing,
- Use more marketing methods,
- Participate in co-operative marketing methods,
- Have more guests from the United States.

Overall, most nature-based businesses indicated they grew in the past five years and were optimistic about growth in the next five years. In fact, businesses projected their revenue would grow by 34% between 2002 and 2007. Businesses indicated that growth in the nature-based sector could be accelerated if constraints such as too much industry regulation, the lack of a long term guarantee of access to the land base and competition for resources amoung multiple industries on the land base were addressed.

Limitations

- By definition, results presented here **do not** describe characteristics of frontcountry nature-based experiences such as downhill skiing or golfing, or expenditures by individuals participating in non-commercial nature-based activities such as self-guided hiking and kayaking.

- Tourist expenditures before and after visiting nature-based tourism businesses and that of locals (non-tourists) that use nature-based tourism businesses are not included in the economic impact figures. Previous research has demonstrated that this additional spending can be substantial which, if counted, could generate a substantially higher value of the commercial nature-based sector[11].

- Data presented here was collected for 2001. Also, data collected about clientele were estimates from businesses and not collected directly from clients. Significant changes to business or client characteristics since 2001 are unlikely but caution is warranted when interpreting the results.

- The summary of business characteristics includes businesses that were operating during the study period (January 2002 until August 2004). It excludes businesses that were started just after or businesses the ceased to operate prior to the study period.

- Given that this is the initial report of this project, the results presented in this report must be considered preliminary and should be used with caution. Nevertheless, at the level of total activity at the provincial level, the data do represent a reasonable description of the commercial nature-based sector of the tourism industry.

[11] See, for example, *The Economic Value of Additional Spending by Fishing Clients of the Babine River Corridor Park* by Pacific Analytics Inc., January 2003 or the *Guide Outfitting Industry in BC: An Economic Analysis of 2002* by Pacific Analytics Inc., December 2003. Anglers on the Babine River spent an additional $0.407 at other locations in British Columbia for every dollar spent at Babine River lodges. Clients of Guide Outfitters spent an additional $0.157 at other locations in British Columbia for every dollar spent at Guide Outfitter lodges.

Next Steps

The results presented here are the first step in an attempt to carefully measure and describe commercial nature-based tourism in British Columbia. In the near future a number of tasks should be undertaken to expand and take full advantage of the work already completed, they include:

- Updating of the NBTB database on a regular basis (annually) in order to track changes in the number of nature-based tourism businesses.

- Annual surveys of nature-based businesses to understand future changes in business revenues and expenditures. Responses to these surveys will enable the 2001 economic impact estimates to be updated.

- Undertaking efforts to quantify expenditures of clients prior to and after their experience at nature-based tourism businesses. Previous research has demonstrated that this additional spending can be substantial which, if counted, could generate a substantially higher value of the commercial nature-based sector[12]. Spending prior to and after an experience at a nature-based businesses should be collected directly from clients and will require facilitation by businesses. It has been proposed that businesses distribute 'consent cards' that will solicit participation for this additional research. Subsequently, Research Services, Tourism British Columbia will survey participants about their additional spending in British Columbia as a result of their nature-based experience. Economic impacts of the additional spending will be estimated and added to the economic impacts outlined in this report.

- Collecting financial statement data by tourism region and/or sub-sector. If sufficient data is collected it would be possible to estimate economic impacts for tourism regions and/or sub-sectors.

These recommended activities cannot be completed without help from individual nature-based businesses and sub-sector associations. There have been several studies (of Guide Outfitting and Heli-Skiing) that have provided in-depth regional and/or sectoral statistical information that was included in this project. It is hoped that over time other associations and the businesses that they represent, will undertake similar comprehensive studies of their own sectors, and provide statistically valid information for this project.

[12] See, for example, *The Economic Value of Additional Spending by Fishing Clients of the Babine River Corridor Park* by Pacific Analytics Inc., January 2003 or the *Guide Outfitting Industry in BC: An Economic Analysis of 2002* by Pacific Analytics Inc., December 2003. Anglers on the Babine River spent an additional $0.407 at other locations in British Columbia for every dollar spent at Babine River lodges. Clients of Guide Outfitters spent an additional $0.157 at other locations in British Columbia for every dollar spent at Guide Outfitter lodges.

Appendices

Appendix A - Calculation of Economic Impact

Appendix B - Open Ended Comments

Appendix C - An Input Output Primer

Appendix D - Surveys (Interview and Mailback)

Appendix A - Calculation of Economic Impact

Prepared in part by:

Jim Johnson of Pacific Analytics

Pacific Analytics Inc.

P.O. Box 5103
Victoria, B. C. Canada V8R 6N3
Voice/Fax: (250) 370-1775

Email: pacanalytics@pacificcoast.net

Given the relative heterogeneity of the industry, it was first necessary to categorize the various nature-based tourism businesses into groups that were more-or-less homogeneous in their operating activities. This resulted in the sub-division of the industry into 13 unique tourism sub-sectors (Table A1). Once the sub-sectors were defined, each nature-based business in the NBTB Database was coded to one of these sub-sectors according to the primary activity of their clients. In this way one is able to identify the total (universe) number of businesses in each sub-sector.

Table A1. Sub-sectors of the commercial nature-based tourism sector of the tourism industry.

• Adventure Lodges Comprehensive Lodge*	• Guest Ranch	• Land-Based Summer***	• Other Marine*****
• Adventure Lodges Standard Lodge**	• Guide Outfitters[13]	• Land-Based Winter****	• River Rafting/Kayaking/Canoeing
• Boat Charters	• Heli-Skiing[14]	• Ocean Kayaking	• Saltwater Fishing
• Freshwater Fishing			

*Comprehensive Lodge = A destination lodge (fixed roof) and offers activities at an extra cost (which could be embedded in the package price). This type of lodge will provide food, although it may have a for-purchase restaurant.

**Standard Lodge = A destination lodge (fixed roof) but does not offer activities at an extra cost, although those activities may be easily accessible from the lodge. This type of lodge may offer food, within a package price or in a for-purchase restaurant.

** Simple Accommodation refers to establishments that do not provide any facilities other than accommodation. In non-urban regions, these businesses would include many motels and / or vacation rentals (houses and / or condos) that form an important link to nature-based tourism. It should be noted that the category "Simple Accommodation" are not destination lodges and have not been included in this analysis because at this time it was not possible to develop a comprehensive and accurate listing of all businesses. However, the NBTB Database may be enhanced to include these businesses in the future.

***Land-based summer includes businesses that offer activities in the summer and are dependent on the land-base. These activities include mountain-biking tours, other cycling tours, ATV experiences, bird-watching, nature-based cultural tourism, education, hang-gliding / para-sailing, hiking / backpacking, horseback riding, llama trekking, rock-climbing, day sailing and wildlife or nature observation including photography.

****Land-based winter includes businesses that offer activities in the winter and are dependent on the land-base. These activities include back country ski touring, cross country skiing, winter education, snowmobiling and cat skiing / snowboarding

*****Other Marine includes scuba diving, wildlife viewing (whale watching), sail cruising, pocket or power cruising and marinas.

The next step was to determine the total tourism revenues earned by all firms in each sub-sector. Unfortunately, the mailback survey was only able to establish tourism revenues for a small subset of companies: in the neighbourhood of five businesses in each sub-sector, although some had slightly

---

[13] The data for Guide Outfitting were derived from a different economic study: *The Guide Outfitting Industry in British Columbia: An Economic Analysis of 2002*, prepared by Pacific Analytics Inc., December, 2003. Although that report used a more precise approach to determining overall revenues, it uses exactly the same methodology as this report to convert revenues into Output, GDP, employment and tax estimates and for determining indirect and induced spin-off impacts.

[14] The data for Heli-skiing were derived from a different economic study: *Socio-Economic Benefits of Helicopter and Snowcat Skiing in British Columbia*, prepared by Brent Harley & Associates, June, 2002. The study uses a different methodology for determining overall revenues, but uses essentially the same approach as the present study for estimating Output, GDP, employment and tax impacts and for assessing indirect and induced impacts.

more and others had less.[15] Hence, for most sub-sectors, the number of businesses with valid revenue estimates was not considered large enough to determine average revenues per business with an acceptable level of accuracy. This required finding another way to estimate revenues for some or all firms in each sub-sector.

The solution chosen was to develop proxy revenue estimates using payroll data from the Worker's Compensation Board (WCB). The first step was to match WCB data against the firms in the NBTB Database, with approximately 600 matches being made. This allowed payroll-to-revenue ratios to be calculated for each company with a revenue estimate in the NBTB Database. With that, it was a simple matter to calculate an average payroll-to-revenue ratio for each sub-sector.

The next step was to apply these average ratios to each of the matched firms in the WCB database, assign proxy revenues and include these additional revenues in the NBTB Database. From this new, larger sample of company-specific revenues (based on anywhere from 25 to 50 samples including both the original and the proxy revenue estimates in each sub-sector), average revenue estimates per nature-based business were estimated for each sub-sector. Finally, the average revenue per business was applied to the universe total of companies in each sub-sector, from which total revenues earned for each sub-sector were calculated.

Once an estimate of total revenues earned by each sub-sector was calculated, it was then necessary to determine the overall economic impacts of these revenues on the provincial economy.

Over the last year, a number of financial statements have been collected from various nature-based tourism businesses. These estimates itemize the types and total revenues earned plus the detailed expenses, including payroll and capital asset acquisitions. These statements were coded to a uniform system of accounting and an "average" financial statement generated for each sub-sector. After that, the average financial statement was weighted or 'grossed up' so that total tourism revenues equalled total tourism revenues calculated from the NBTB Database.

The next step was to map the accounting codes into National Accounting categories in order to create average Input-Output tables for each tourism sub-sector.[16] Once the Input-Output tables were developed (which tell one the direct impacts of the particular sub-sector), the data were run through Statistics Canada's BC Input-Output Model. This model enabled a calculation of indirect and induced impacts.[17]

Unfortunately, the number of financial statements collected was not large enough to calculate impacts for each sub-sector with a reasonable degree of precision. Consequently, at present the results of this project cover only the total commercial nature-based tourism industry. It is possible

[15] For this project, the NBTB Database also was augmented by revenue estimates collected from a number of firms as part of other studies conducted by Pacific Analytics Inc., although these estimates, being confidential, have not been included permanently in the Database.
[16] See Appendix A for an in-depth discussion of how the construction of Input-Output tables is undertaken.
[17] Again, see Appendix A for a definition of spin-off (indirect and induced) economic impacts.

that if various sub-sector associations and the businesses they represent decide that having accurate and credible estimates for their specific sub-sector is of value then the data can be enhanced.[18]

[18] See, for example, *The Guide Outfitting Industry in BC: An Economic Profile 0f 2002*, prepared for GOABC by Pacific Analytics Inc. which identifies direct, indirect and induced impacts for the Guide Outfitting Industry on a regional basis.

Appendix B - Open-Ended Remarks

Appendix B1 – Suggestions About How to Address Constraints

Appendix B2 – General Comments

Appendix B1 – Suggestions About How to Address Constraints

Transportation Suggestions

BC Ferries needs repair / replacement of vessels servicing major and small routes. BC Ferries schedules, staff, etc, are fine but existing vessels can't handle traffic volume at peak periods (major routes) and small route vessels are ageing but not receiving attention.
Air travel in and out of Prince Rupert very expensive.
Develop an affordable group insurance plan possibly self-insured as an industry. Regulate air industry to ensure continued service to our industry.
Our own government is our biggest enemy. BC lands and water, forestry do their very best to eliminate our business by logging, denial of access and oyster farming. Highways and ferries to our place are in lousy condition.
The sheer size of B.C. dictates that tourism needs a secure transportation infrastructure to access all that supernatural B.C. has to offer i.e.: The Chilcotin Hwy (HWY20) Canada's third main Hwy to the Pacific is still partly gravel, to ensure that tour Bus companies, rental cars, etc., use these area's of the province. The transportation infrastructure has to be brought up to the civilized world's standards. The Government of B.C. has to start taking tourism more seriously as the potential biggest Revenue Generation in B.C. by supplying the appropriate the funding and ensuring tourism in B.C. has a secure landbase and transportation infrastructure to compete on the international marketplace.
Re: Government Regulation: Ministry of Transportation - The reason overnight boat tours is presently a tiny industry while operating along the best coastline in the world is because of the lack of appropriate regulations or flexibility by M of Transportation - Ship Safety division. Likewise, the new Marine Liability Act is dangerous and completely unresponsive to the needs of industry.
Commercial air access in north declining. Difficult to attract clients facing transportation difficulties. Commercial air access should work with operators to target clients and in operating seasons.
Our main concerns are would political situation and continuing threat to American travelling. Better security procedures in Canada to instill a sense of trust would help. Also, cost of air travel in Canada prevents or limits our Canadian market. Another airline would certainly help but also government rate regulation.
You never know when the ferries will be on time. Ferry staff are rude and don’t care what the traveller thinks. Since 9/11, a lot of people are afraid to travel. Lost 3 charters this year because people could not buy fishing licenses after hours. Small stores ran out.
We need a commercial airline that flies to Prince Rupert from Vancouver (35 min.) for less than $500 return. It's killing the Alberta and American market. Most of my clients are old. They don't want to drive for 3 days at 8hr / day to get there from Calgary. Forget rest of Canada. It's too far!
One the more mundane side, the effect of reducing services in rural BC has an affect on all businesses. We need good transportation (roads) including forestry, roads and airports. If people can't get here, there won't be 'tourists'.
1) The West Kootenays have no airport that can be used by international flights in the winter month. Cranbrook is a poor substitute as it is too far away. (About the same as Kelowna). A daily bus service from and to Cranbrook and Kelowna could be a possible answer. A direct flight from Seattle also would be helpful. Summary: We need to improve the international travel to the West Kootenays

Rail being discontinued north of Lillooet. Air fares too high and availability too low. Let in US corporation to run these or to give some competition. Should have a ticket system for visitors so they can climb aboard anything and travel anywhere - air, bus, rail, etc. Back roads are very appealing to overseas market but roads are in terrible shape.
Plow roads.
Potential of losing airport in Smithers! This would have a huge effect on my business. Road access is long and with loss of BC Rail Passenger service to PG and the current uncertainty with the Ferries? Transportation is key! Unfortunately that is not the case.
Air access.
Build access trail from Valenciennes road head from the North. Mark route across Ice field. Ensure Valenciennes logging road is not decommissioned. Build satellite lodge adjacent to Ice field.
Affordable air connections to Golden BC. Affordable train transportation to Golden BC. Affordable shuttle service to and from Calgary. Upgrading, safety issues on HWY #1.
Public roads to our area must be maintained in order for tourists to find their way to our facility without hardship. Gates on forestry roads remove access to wildlife viewing as well as scenery and fishing. The gated area should be made available to the public especially when there is no logging equipment or operation behind them.
Improve ferry services! (reduce travel anxiety.) No ferry waits; more experiential (like a 'cruise').
Private sector participation in transportation, i.e. incorporating a tourism service with transportation infrastructure. Pro-active government transportation strategy taking into account tourism value and growth..
Require changes to Dept. of Transport Charter Boat Regulations: Should be based on guests carried, not vessel size; American 6 pack regulations reasonable and adequate for public safety; Canadian regulations open-ended, excessive and at whim of individual inspectors. This is pricing many vessels out of business without possible justification or hazard to public safety; No reasonable court of appeal.
Air access in Western Canada need to increase. I support putting our weight behind the forces lobbying for open-skies with the U.S.
Better BC Ferry service. No one wants to wait several hours in a ferry line-up.

Marketing/Business Development Suggestions

Would be nice to have unlimited marketing $$ or get the Ad first and pay only if it works!!
We market aggressively in BC, Alberta, and North West US. Any assistance would help increase business greatly.
High marketing costs for lower end of our product line. More ($) support for association concept in relation to marketing.
Marketing > Revenue > Education (Human Resources to Recruitment training , retention) > Product / Service (Standards, Certification) > Marketing (More seasons, China / Europe).
Education about the tourism industry for government lenders and investors, i.e. seasonal nature, direct correlation between investment and return.

Partnership investment for developing accommodation
More research for the value of tourism to the coast and province. Stressing the importance of wilderness landscapes and resources for a healthy, viable tourism industry.
More regional brand support.
As a small operation joint marketing ventures through industry groups and associations would be very beneficial since advertising can be expensive. This is an area where Tourism BC could take a leading role.
Keep looking. Adventure in high profile mags/business papers.
Market research, Co-operative marketing. Large government marketing programs.
Training programs for tourist industries.
Partner with 1st Nations. Work closely with Forest Industry. Create a ministry of Tourism. Highlight tourism as a revenue generating business. Have Forest companies involve themselves in tourism. Set up a committee of operators to speak globally and intro B.C. Tourism to world. Get $ to COTA. Staff COTA. Market B.C.
First, 5 constraints is not enough in our complex business. I have at least 10. Marketing is our number one issue. We have to market as a destination and we have no local interest in supporting our efforts.
Selling the destination as a safer and cleaner environment.
I think it is important for small operators to work with other operators in their area to offer a greater range of packages and activities for clients and to share information and knowledge
Money for expansion, still thinking. Insurance will become more difficult, restructuring our corporation will reduce costs and problems.
More gov't or industry marketing initiatives for micro businesses.
I see international travel as becoming more expensive and more threatened globally. I believe days of fee or work for the privilege market as being impacted hugely.
High Marketing Costs: Because we are a small business (some call us a micro-business) we find marketing costs way too high. Cooperative marketing thru the CCTA and Tourism BC sounds like it would be the way to advertise - however, the cost of their advertising campaigns are for the rich only. An example is the most recent direct marketing campaign - the cost is $1035 and you have to supply 3000+ brochures. That is a total cost is too high and we would never make that back in the same year. The problem becomes for us is cash flow limitations. I would like to see some cooperative marketing that is not so high priced and ritzy! We don't need glossy magazines and full color pictures. What about cooperative marketing or partnerships/rebates for printing brochures, web site costs, flyers, radio ads, etc. I would like to see some incentives for small businesses to start advertising
At the beginning of the business it was hard to find the right partners. It would be helpful to get decisions how to find serious tourist companies. Perhaps lists of serious companies and their conditions to work together. I had a lot of travel on jet so, they come only for less money to stay with the promise to bring guests. This cost me a lot of advertising money to find out who is the good, who the bad pay. A list with serious companies (only not perhaps) could be helpful for the beginning and the future.

My business is small (one-woman) and I am not looking to expand, as this very fact is what attracts a lot of my visitors. However, to make an adequate and growing income, to cover ever increasing costs, the only constraint there could be any control over would be (3) and (4). 3) Insurance is my largest, single cost - if there was some sort of help, ceiling, for the small operators, this would put me in a more financially secure frame. Also, 4) if travel packages would be more accessible for overseas visitors, in view of their fluctuating economic situations, it could encourage their travel plans, and our tourist market.
It seems that Regional Marketing agencies, subsidized by tax dollars, place too much emphasis on large tourist operations who can afford most effective space and coverage.
A provincial vision and resources to create an image of be not as a place to view from the window of an RV on Banff icefields parkway, but a place of rich backcountry activities. Example: New Zealand - 1990 set target of 3 million visitors by 2000 from 1 million backed by realistic marketing budget (Forest Industry recently received $20 million marketing subsidy). Ministry of Forest built 40 hut-to-hut trails from 3 days to 3 weeks long. Based on confidence due to Government commitment Hulle Investment by private sector into competitive accommodation campsites with inexpensive cabins and modern hostels and B and B, and competitive guided tours, e.g. 500,000 Japanese backpackers. Japanese Language guiding and marketing front. Highly developed aboriginal culture. By 1992, Ecotourism was Mass Tourism not 'Fringe' like in BC, with 1 / 10 natural resource base; no wildlife to speak of, but similar to be in terms of potential activity resource. BC Nature Sector needs to be brought together to create vision tar
Stop logging trails on Vancouver Island. More gov't support for tourism, Natural based tourism.
High marketing costs. It is difficult to market in many areas. Print advertising is very costly, TV or radio prohibited. Internet seems to get 'best bang for buck'.
We are competing in a worldwide market. Due to increasing regulations such as insurance, bonding, licences, land use fees (all requiring, higher fees due to increased cost to the operator for these) we are having difficulty in complying, staying in business and competing with world markets.
A Ministry of Tourism with funding that reflects revenues generated for the province, and percentage of gross income, wages and workers would be a reasonable beginning. .
Domestic marketing absent and visitors lack awareness of other BC attractions.
Strengthen industry organizations to begin moving towards above goals. Promote small businesses, locally owned, throughout the province. Big is not better in this context. Avoid multi-national corporation control of tourism resource
Regionalism, eg, Whistler refuses to rack brochures for Bowron Lakes; this is a serious barrier to repeat visits. Visitors will not come back without current host selling other BC experiences to them.
BC loosing out to New Zealand: lack of serious marketing strategy.
Ministry of Tourism is needed, a single, dedicated ministry.
Most important, today, is the economy in the countries where we attract our guests from (USA, European countries).
Provincial Government must take Tourism Industry seriously. We need representation equipment to Forestry. Tourism needs to be promoted and supported with financial resources equal to Forestry. Government must reduce “Red Tape” surrounding Cr tenures and allow the stakeholders to design the criteria and “Arbitration”

process for them. Government must be realistic with lease tenures using BCAA market value times a mystical percentage is unrealistic. Lease rates need to be recalculated using early 1990's values times the Consumer Price Index (CPI). Lease land needs to have the ability to be recognized by banks as acceptable for mortgages at the best rates available.

Government Regulation/General Government Suggestions

In terms of land tenures for licenses on leases. In the past this has been a nightmare, however, it appears bureaucracy is beginning to understand and deal with the constraints. Why should a fish farm license receive tenure for 20 years while ongoing tourist operation is lucky to get 10 years. Why can't Wilderness Tourism Assoc. do something about the weather?
Federal government needs to consider impact of political stances, eg, war with Iraq and how they impact on Tourism. Alienating our major trading partner is not the proper approach I believe Tourism will be another industry adversely impacted by this stance.
Cost of Government Regulations: The cost of licences, tenures, permits, and the length of time it requires to research
I believe in regulation - it's good - but phase us in - tell us this year where we have to be next year. Not next week. Govt's change - and so do the rules. Nothing's constant. Why should I invest $500,000 on a market that isn't stable.
We are trying as an association ROABC to get the federals to understand that we have spent many years - since '88 - streamlining our provisions and reputation. They are blowing it out the door and doing the usual federal crap and complicating issues with bureaucratic expensive nonsense. So as for suggestions??? We have done all we can and will continue with the struggle only to have to suck it up and see standards in BC drop.
Too much money spent by Government on foreign policies, foreign aid and government wages and retirement plans for ex-politicians - more should be re-invested in Canada's #2 industry - tourism. We need a Minister of Tourism with a dedicated team. More aid by government should be given both financially and in promoting rural areas; historic sites of BC - we have more to offer than just Vancouver, Victoria and Island and the Okanagan wineries!
100% direction change for L.W.B.C. For the last 23 years I have dealt with at least 6 different names for this Ministry. The one thing that has not changed is the fact we still have no tenures or certainty in river-based tourism. What we now hear from L.W.B.C. is that per-head taxes are to be imposed on guest-days. AND de-regulation of River Safety Act. No certainty and user fees - non-viable business. Suggestions to Address Issues: 1) Formations of a Guides and Outfitters Board: Self-policing; Self-administered; with Government representation on Board; Mandatory membership for Commercial operators in Province of B.C. 2) Access to Insurance: Soon to become HUGE problem; Access to insurance would be easier through above mentioned Board. 3) Keep current River Safety Act. * These suggestions are useless to bureaucrats fond of BIG government seeking BIG budgets for their departments.

Each and every year, National Parks, Provincial Parks, or B.C. Govt. has added new requirements, fees, etc. All with good intentions. Each year the fees increase a little bit. At some point there will be too many hoops and too many small expensive to justify the return. Only the largest companies (of which I am one) or the most determined ones will survive. Now talk of commercial operators paying high use fees for Crown land will drive us away. If Land tenure applications (tedious and expensive procedure takes place), that will be enough for me to say, This is too much. I am going to downsize, fire staff, and keep it simple - not work in areas that require tons of applications and fees.
In terms of issues that will impact our long term growth, the most prohibitive factor is the government's lack of consideration when it comes to small businesses in the tourist industry. At present, tourism in the province of British Columbia is in a dismal state. The most serious constraint to the growth of private resorts is the forestry campsites which do not require a nightly fee, as well as the request by the Ministry of Land and Water of B.C. to pay for the use of crown land. However, increased publishing costs and insurance costs certainly add to the burden of trying to keep a small family-run resort afloat. First of all, the government needs to get its priorities in order and realize that there are important issues such as increasing costs of health care, and the large number of school closures which could be avoided if they subsidized these services by fees collected at forestry campsites. These services are essential to the public; however, a no charge forestry campsite is not.
I find most of these surveys to be useless, as generally nothing will be done to correct the problems we face. Here in the Queen Charlotte, operating in the South Moresby Park Reserve, we have to deal with Parks Canada and the Haida. Non-native companies are being stripped of quota to make room for an almost non-existent Haida tourism. There are two sets of rules: One for Parks Canada and the Haida and another for non-native commercial operators. My company finds clients by utilizing a web site and by word of mouth. We provide a range of services to our clients as well as other touring companies in the area. We are coming close to using all of our allocated quota (which we had to spend $40,000 in a law suit to get) and Parks Canada is taking steps to limit the amount of quota any one company can have. Our problems stem from over regulation and a very flawed Canadian constitution.
Regulation of Charter Fishing Boat Operators. Requirements for experience, training, etc. Sooke could use a good, clean, motel/hotel for guests to stay at. There are many B&B's but that is all. Tourists need to be encouraged to come out from Victoria, to see what Sooke has to offer.
The Federal Government (Fisheries & Ocean) must keep sportsfishing open in our general area and must avoid closures. DFO has to provide long-term opportunity and expectation for recreation fisherman. With salt water regulations there should be a more level playing field with regulations that would make it easier for related businesses to operate. Unlike guides that can move where the open fishing areas are located, we are a land based business that pays property taxes and stays in our local area.
Over lap of permits. Have to get 3 or 4 permits just to do business. I.e. parking permits/CBR permit/rafting permit/fishing permit, etc. All for same area and operation. Insurance hard to find and price jumps up and down. Right now is most expensive cost to business so far. Up to 80% of cost per year.
An ability to operate or improve structures/facilities less than one year approval process. Recognized at government level as an appropriate value added industry. Regional flights – abundant/affordable to promote Northern BC products. Appropriate marketing initiatives for NBCTA - pertaining to wilderness.
Business has been on steady down turn since DFO closed Coho fishing. We have lots of fish and none of them are from the Thompson River. They terminate here. There are so many Coho you can't get through them to catch a pink.

Reduce Gov. Red tape. Make access easier. Promote our area as a safe place to travel.
Aboriginal rights are becoming too generous. Hunting 24/7/365. As their population grows, I can see the days when some species will have to be protected.
We have been fighting since end of eighties to establish a quiet nature-based small tourism operation. But due to lack of legislation or unwillingness to enforce existing legislation by government agencies against excessive noise we never had a chance to develop a profitable business.
We are only 2 km a park boundary and because the Park allows no mechanical vehicle, we have to rely on horse and wagon to bring in guests. The horses are expensive and can only make 2 trips per day so we cannot increase our guests. We have asked for a tractor instead of horses and the parks say no. We are supposed to be partners in Eco-tourism, but the Park will only allow horses to move guest and people. We have a park permit which is given out annually so it is very difficult to get investment with no tenure. Before it was a park, we had a 15 year lease and we used a tractor. We are still looking to change these two important items. Our lodge is owned by 43 partners so our lost is distributed otherwise we would be out of business. There used to be 5 lodges in the Park and we are the last one due to access.
Government Regulations: Provincial parks require more and more permits and regulations and because these permits, we are required to become their eyes and ears and tax collector. (Park) They have no money for enforcement. They have no money of controlling access to Tweedmuir Park by private pilots so they put the squeeze on us. Also, constant overlapping and in-fighting between departments.
Sooner notification from DFO on area closures and catch limits are needed and unless this happens it is difficult to get bookings. We need to tell our customers what they can take home and when and where they can fish before they commit.
Industry regulation will go hand in hand with increased costs i.e. Insurance. With this in mind, only the large businesses in my field will be able to continue simply because of their increased resources over mine. As well, because at their large revenue they will be able to offer charters at a lower rate than I would each give.
MCC has been absurd. Crown Land regulations have become draconian. It's a sin to gun registration, making criminals of law-abiding citizens. Aims toward conflict. The rich can afford the fees, small companies can't.
Combine all agencies that handle a portion of the Tourism licensing into a one-stop licensing branch. Delete Red tape, multiple licences and reporting requirements to one-License and one-Report. I have 18 licenses to date that each requires different reporting requires, conflicting regulations and numerous reports that get filed away and are a waste of time and resources. I am a seasonal business in a remote area.
Provincial and Regional Governments treat tourism as a 2nd class industry. This is represented in their designs of ministry structure and policy.
Stop worrying about preserving genetics in wild salmon and continue to enhance fish stocks. Even the playing field and stop discriminating against the second nation because of Squatters rights. Doesn't matter who was here first, we all should have equal access to all resources. Governments should make it easier for the little guy to operate a business even though he has no capital to work with starting out, but red tape.

Constantly increasing government regulations (read costs) coupled with increasing liability costs and marketing costs are all about to put me out of business. For instance a guide licences used to be $100.00. It jumped all at once to $240.00. Now I notice there are 3 more lines added to the licence fee this year - `Classified Waters Fee', `HCTF on classified waters fee', and `administration fee'. I don't guide on classified waters, however, how long will the `administration fee' remain at zero? When a number of lakes where made into Parks a few years ago, all of a sudden, on lakes I had already been guiding on. I now have to pay a $107.00 fee, put up a $1000.00 bond and carry $2 million liability.
Nature-based tourism businesses should be given exemptions from industry regulations, such as labor regulations. Seasonal periods of operation should be taken into consideration.
Have bureaucrats who listen to experience rather than to falsely base information coming from self-serving environmental organizations and their 'experts'.
Too much regulation from government branches that tell you what to do. They don't have any idea!
The closing of forestry campsites will make it more difficult for visitors who want to be more close to nature, but on their own, to access the very reason they come here. Maintain the campsites and make some minor improvements to roads that are already established.
Industry regulation is inconsistent, haphazard and unenforceable. This puts local operators who are following the rules at a disadvantage to foreign operators who come in and renegade. Adventure operators appear to be the scapegoats for regulation. It seems that clients who wish to sue an adventure operator to experience an area are treated with different standards, thank the general public, e.g. general public does not have as many restrictions on group size, etc.
Relax some of the liquor laws
Government ministries support resource extraction at the expense of tourism values.
The different government agencies in each region do not administer the policies the same so operators in one region work under different interpretation of the rules. Some more lenient than others.
Access issues: some tourism and recreation issues are incompatible with each other, e.g. skiing and snowmobiling. Government is unwilling to regulate. Tenure: Like security, Law B.C. will grant overlapping terms without consultations. Since they derive their income from license fees, they are in direct conflict of interest as regulators.
Regulations for charter boat operators from federal and provincial to reduce part-time (under the table operators). Also restricting number of operators allowed in areas similar to provincial regulations for freshwater guides in areas like Dean River, Babine, etc. This would allow existing operators more room to grow.
Development of facilities limited as operate in provincial park. Difficult to upgrade in Parks environment.
Government regulations if implemented could seriously drive insurance costs to levels that could make operations non viable.
I recently returned from a trip to New Zealand. I spent nearly three hours at LAX getting too customs and forwarding my checked through luggage. Many people in the line-up said they would never travel through LAX again.
Less Gov't bureaucracy. Constant increase in fees and licenses. Lack of funding for Conservation Officers equal increase in poaching. Serious increase in logging due to beetle infestation equal increase in logging roads and

poaching. There is a general lack of funding for fish and game in this province and it is only getting worse. The Gov't and forest companies make billions off our trees and nothing is returned.

Land Use/Tenure Suggestions

Fishing regulations have been the reason I am only able to economically work June 15 to August 31. Changes to the way tourist are able to process their catch would extend our season by two months.
Coast is being cut up into small (and large) limited en try areas. This is a major concern.
Logging shocks European tourists on Bowron Lakes (outside park boundary).
Allocation of secure land tenures with appropriate management plans and environmental precautions. Land use planning to maintain what remains of Beautiful BC landscapes.
A secure land and morning tenure process, e.g. 20-100 year leases
International travellers come to wilderness areas because of the beauty and the lack of a man made environment. If everything is a clear cut, we will loose our market to other progressive countries who maintain pure undeveloped wilderness areas.
We are in a mosquito control area and still have terrible mosquitoes.
Maintenance to existing trails. Add new trails.
The Native issue is a wild card with us.
Aboriginal hunting detriment to game populations. Must be regulated and patrolled better.
I am totally against the land claims settlements. I believe that many areas will be closed to ordinary citizens. This has already happened in New Zealand where some rivers are now off limits to non-Maori citizens after the government said this wouldn't happen.
Preserving natural environment in Blackberry Valley. Logging industry needs to cooperate and understand issues of local tourist based companies. Local tourist related companies need full ministry support including water-management to preserve native fish-bearing creeks, streams and rivers.
A secure lead base / viewscape would be either 1st or 2nd depending on what happens to transportation. We use Forestry Recreation Sites for Access / Egress for much of our Outdoor Education. This could be a real concern in the future. Addressing all the above issues would take a government that believes in and supports tourism,
Better and more comprehensive land-use planning for recreational (both commercial and non-commercial) uses. In the Central Interior part of the province this is very low on the priority list of government agencies. MSRM or whoever is dealing with this these days needs to develop zoning for certain types of activities and have some sort of enforcement or penalty for those that refuse to accept that their activity displaces other users.
We must have the ability to secure land tenure, i.e. on sea kayaking base camp. All other industries can get tenure but we can't. We operate for 80 days for everyday in the summer from one camp. Our application for tenure has been sitting on someone’s desk for 3 years with no communication from BCAL at all. The long term viability of our company depends on securing land for our base camp.

My wilderness tourism vacations depends on wilderness surroundings. In a nutshell, the way to guarantee the presence of wilderness for future generations is to close road access into key areas after timber harvesting, or between times of harvesting activity. Nature will heal the scars of industrial use in time, but my clients will not pay to recreate in an area with uncontrolled access and fish and wildlife populations will not thrive in areas with the high use promoted by uncontrolled access. If people must hike, use horses, use boats, or fly in to these areas, the values will be protected.
To sustain our business and ensure long-term growth. We are active in local-government, local tourism and environmental agencies, regional tourism associations, have open ears to any issues that may impact our tenure or affect our business. Being involved, and providing input on issues that concern the wildlife and land base are ways we are trying to keep 'wild' in the wilderness.
Set aside the forested land beside the water ways as a working forest. Logging should be prohibited and roads minimized. A trail system can serve the nature-based on the lakes and rivers. Operators, keeping the integrity of the ecosystem (land) in good shape. This is of prime importance because this is what attracts customers. I believe in nature-based tourism but I think it is extremely important that nature is not harmed or exploited in order for the business to take place. We need to teach people to relate to nature with the greatest of respect, to share in it, but not to hurt it so carelessly as is the habit of our western culture. I think the government ought to pay more attention to the smaller nature-based tourism operator and be more sensitive to the unique needs (undamaged wild land). It is a sustainable, ever-growing industry. Take care of it!!!
Many of our wildlife and scenic values wilderness values appropriately. There has been a dramatic change in society values relating to recreation outdoors yet government has not responded.
Our business has been seriously affected by an oyster farm which has been placed in front of our business. Many tourists have stated they come for the wilderness experience and they are turned off when they find a commercial operation situated about 200-400’ from the shore. The government should really question an application which is not filled in properly. As in this case, the oyster farmer applying for tenure did not fill in the question concerning non-motorized boats and yet he was given this tenure, which has affected us detrimentally. There were no questions asked by government officials.
Simplify gov't regulations that affect our industry (#1 = boating reg's).
Results based code is a #1 concern - visual quality, noise pollution. Participation in land base decision making all are important to my business's success. Sorry for the delay in return of survey.
Keep oyster farms away from key water-based tourism businesses and key recreational areas. Don't clear cut near key tourism areas.
Land use issues. Tenuring - Difficult with uncertain land assessments on which lease fees are based. Purchase of crown lease will eliminate lease fees but cost to purchase may not be economically advisable. Short seasons do not produce great incomes. No year round road precludes most winter operation. Multiple industries / viewscapes - logging in area is changing viewscape - too many clear cut areas close to small mountain lakes. Possible closure of forestry, roads, roof, will hurt backcountry fixed accommodation business.
Tourism needs to be part of all land-based plans and needs a voice as equal player as forestry, mining, etc. Tourism is forever if other users are made to take our industry into consideration. Government is trying to streamline but with too many rules and not enough vision or enforcement is becoming our biggest problem. No assistance! Just Fees!
Get Gov't out of the recreational land management.

Being priced out of business by increased fees charged by Government (lease fees). Fees that break the camels back if passed on to customers. Affordable tenuring by allowing spin-off dollars to have some bearing in the cost of land rental, a performance bonus if you will.
Place management of land use with primary resource users. We would then be responsible for resource (timeless) attraction, but it would meet our concerns. This covers items 1,3,4,5.
More emphasis on the recreation - less on logging and access. Pressure put on Government from organization like the people you are doing this survey for. Our industry is sport-fishing. All the camps in our area rely on fish.
Maintain the Provincial and National Park System. Restrict forestry and fish farming activity in coastal and tourism-utilized areas. Abolish `working forest' proposal. Strong intra-industry regulation to prevent need for government regulation. Free (unrestricted) access to public lands - no exclusive company (eco tourism) tenures. These are non-democratic and non-Canadian!
I think the most serious constraints for our business would be river access, lake access and fees associated. We have been hit with fees to use local lakes. Also with Ministry of Forests ceasing to fund money for trails and rec. sites this will discourage people from planning trips that include us and hiking if the trails and roads are not maintained. I believe that BC needs to keep its trails, f.s. roads and campsites well-funded to attract tourism from outside of BC. The Leavenworth / Icilcle Creek in Washington is an excellent example of how we should manage our forestry campsites.
I am concerned about Parks Canada allowing City based outfitters (who already have a large customer base) to move in and take away business from local operators (like myself). These companies generally come in with a trailer loaded with kayaks, guests and full provisions, park the trailer along the roadside and disappear for a week! They spend very little money in the local community, whereas our clients are usually staying in local accommodations and putting money into the local community. Just ask anyone who lives in Tofino about this sort of thing.
Land use issues strike fear into citizens. There are limited Land Use Guarantees, that coupled with multiple level government restrictions, can surely hamper future prospects.
Guided fly fishing trips (river) have increased dramatically in the last 5 years in the East Kootenay Region, in particular the St. Mary's and Elk Rivers. The Ministry must address the major concerns and issues to the industry in order to sustain long term and continued employment of the resources for all. Some issues to address: Number of angle days; number of guides; *number of assistant guides; Regulations (catch and release, etc.). Due to the number of guided anglers on these waters, during peak season (mid July-mid Sept) the Social aspect must be addressed. Balancing the economic benefits for the area and protecting the Resource (maintaining the quality and integrity of the product!).
Keep the fish farms and log shows out of the Stuart Island Area - there is a STRONG TOURIST BASED ECONOMY, that will only suffer with the incursion of these industries. Neither Fish farming nor logging brings as much benefit to the province from this locale. These are industries for anywhere else in the Province, but not for here - you're shooting yourselves in the foot.

The most serious constraints facing the charter sport fishing industry in the Vancouver area are all concerned with salmon stocks. Being in an urban area, we rely upon enhanced salmon runs for our fishing opportunities (urban sprawl and other development having severely depleted natural runs). We rely on Chinook and Coho salmon for most of the year, and producing them (smolts) in the local established hatcheries is a MUST. It is relatively cheap, and increasing production would provide immediate boost to this industry. Sustained production would lead to an overall increase in the number of operators and grown the industry. While I mainly rely on repeat local customers, most other operators rely on tourist for the majority of their business. The Sockeye fishery is another major concern. It occurs at the extreme peak of the tourist season. The politics and closure imposed by the department of fisheries during the past several years have caused revenue losses of several thousands of dollars per year.
Competition for salt-water fish, ie, salmon, lingcod and prawns is a real problem. Sports fishing versus commercial fishing and the real lack of Coho in our area is quickly killing the fish charter business. I will endeavor to derive more business from diving in the future.
Local regional district zoning problems, i.e. should be a separate or unique zoning to incorporate older existing businesses.
The biggest issue threatening my business is the Seine netting at the mouth of the Skeena which decimates the Steelhead runs. There has to be some compromise with the commercial fleet or the steelhead fishing industry will continue to suffer.
I hold an Angling Guide License on a classified River and Rod Days, but I have no guarantee about my Rod Day tenure.
Land use conflicts weighted towards resource extraction activities must be mitigated through Ministerial representation. Cumulative impacts of activities must be used in land use planning processes. Bring back and fund a tourism Ministry!
When government recognizes the First Nation inherent right to our lands / resources it will open the door for certainty for all tourist operators. To go down the road of conflict between F.N. and MOM, ensures that all of us tourism operators will feel negative effects. As First Nations we shall overcome all that is put before us. As a tourist operator I want to see all of us get along. Archeological significant sites must be recognized as always belonging to First Nations. If not there shall never be certainty concerning the land base. Tour operators who do not recognize F.N. rights will see protest and end up in the courts, thus spending part of their operating capital on lawyers. Consult with F.N. properly and we shall see all of us prospering in the future.
If fish farms are polluted we owe to the extend that we wire out for example the pinks, one of our strongest selling points (grizzly walking) will disappear and BC will get once again (old growth before get very bad reviews in Europe).
BC and 400000 laws and regulations. Figure yourself!
The whole motor carriers system has to be scrapped. All it is, is a blockage for any new business and a free be to all established big companies.
Predator Control
Securing the land base as wilderness without roads
Winter habitat for ungulates.

The government has given out tenures to incompatible industries causing conflicts with regards to land use. Changing this will prove difficult now that the tenures have been given out. But looking at applications carefully, consulting those who are involved, and getting scientific information to verify data will help the process.
Have Forestry put this her priority to maintaining Visual Quality Objectives (VQOs) in Forest Planning objectives.
Have forest industry curb clearcut logging, especially in old growth and high elevation logging unless it is single tree selection (above 4000 ft). Highly visible steep terrain not logged at all. Forestry roads need to be maintained by the forest industry.
Industry needs more rules for to help enhance areas for the tenured activity, i.e. no snowmobiles in ski areas!
I need to build another lodge and I could fill it during my high season. I can and I may build it as I have approval, but I need to access the landbase carefully first to be sure we are not overusing it and downgrade the experience we are presently offering!
Longer tenures = more security = less risk for venture capital. Longer tenure - more tenure, security = increase business value.
The provincial land, non exclusive, occupancy is in my opinion or understanding an enigma. The local ATV and off-road biker group have 'trails' through-out the front-country area. An organized group out of the lower mainland have been riding, and holding weekend competitions in the back-country bush north of Botanie Valley for years, and since they have worn trails in the area rebel groups of bikers come in and tear up the country side. I have leased 80 acres for hay and pasture along Hwy 12, and had a difficult time (being verbally abused, threatened, had fences cut and horses chased by dogs, a stevedore would not have had any trouble understanding them) when I asked them to not ride up and down the hills or do wheelies in our hay field. I'll admit that the land had lain fallow several years but we posted it and were repairing the fences at the time. Now when I produce a business and environmental operational plan based upon solid research by the Rocky Mountain Research Station out of Utah.
District and Regional managers must make access management planning a priority. We must have a secure land base to conduct wilderness activities.
Streamlining the permit process for guiding groups in National and provincial Parks
Tenure process - too long, lengthy, time consuming and bureaucratic; not to mention expensive.
Competition for natural resources. Related to CR tenure issues. Security questions in relation to capacity, as historical users, should have some grandfathered recognition. Multiple users have potential of downgrading product. Need to evaluate what realistic capacities are. .
Should only be one commercial operator allowed to market and sell similar types of trips in a remote wilderness area. If more than one there, conflicts and over crowding.

Government needs to understand what makes nature-based business technical. They have to come to the table and discuss with operators their requirements, i.e. access to the land and do not allow other conflicting uses. The product we are selling is snow, untracked powder. The government thinks more uses are better. By wilting away at the tenures, operators are being pushed into areas that can create unsafe situations for the tourist and employees, ie, by allowing snowmobiling on a heli-ski run makes that run unusable by the heli-ski operator. The run that is shared is usually a bad weather run for the heli operator. Something considered safe. When the operators are pushed out to other areas. Snow is one example. Government policy is made with little or limited consultation with industry, often token consultation
Land use planning: most serious tourism is not recognized as a resource industry. Other, extractive, industries are given guest-unlimited access to resources, while tourism is simply not entering into the picture. Viewscapes and integrity of the landscape are destroyed, while no concern is given to tourism interests. Lack of government regulation: no certification is required in mountain guiding on Crown land. Unqualified competitors take advantage of the public's lack of knowledge and give the industry a bad name.
Keep fighting for protected areas.
Law BC vs. Protocol Agreements; we need to know who has the rights to the land. We cannot afford to pay fees to both.
Long term access is critical for planning and expansion.
CR Tenures need to have long-term commitments from Government. Tenures need to be longer. Fees need to be fair across each differing activity. Low impact/low number operators should be permitted rather than tenured. Tenure application process too costly for small operators. Too many FSR issues. Need to know who has jurisdiction, MOF or LAWBC or operator. Where operator providers a public service, the operator should have mechanism to recover costs (e.g. user fees, etc.).
Re Visa: LWBC and Tenure Agreements.
Maintain public access to Parks.
The ministry for Parks and Recreation should be expanding tourist based areas instead of decreasing lakes and closing parks. As the forest industry decreases there is a definite need for dollars spent on tourism. As I write this in 2003 our lumber industry had suffered a great deal, impacting the local economy and businesses. There is excellent resources here to increase tourism (such as the government maintaining old forestry roads for access into Crown Land and Parks).
All industries on the land base need equality when making land use decisions / allocations. Highest and best sustainable use over the long term (often tourism) needs more consideration when planning decisions are being made.
I am very concerned about land use decision-making. Is tourism a real player at the land use table? The very issues that WTA is bringing to their forefront. Wilderness is shrinking and priceless. Wildlife (animals, birds, fish) are priceless! We can't lose this stuff.
Land use planning. Maybe too late.

Less influence by scientists on management activities. More trust by govern ment of tenure holder. More input by tenure holder in developing adequate methods for supplying resources. More access control. Licensing of ATV's and snowmobiles make them accountable for damage to environment and harassment of wildlife. Allow some decisions to be made by the court system instead of regional managers and ignorant (SIC) members of appeal boards. Consider long-term impacts of resource extraction versus short-term gain. Find alternative fuel resources for coal.
Parks, Park fails to recognize business needs. Feb / Mar license renewal, decision a huge issue. Get 2 year marketing plan! Portage with eight restrictions: yet has to compete with rafting. BC Parks, do not appreciate business, eg, don't cancel bookings. Rescued other park visitors, no appreciation. Refuse to apply cabin to group site.
The approach the WTA is taking on Working Forest is the correct way to go.
The government must get its act together on backcountry tenures.
Tourism needs a security of land base if it expects to grow, attract investment, and hold on to the internationally accepted supernatural B.C. label. One of the key tools that tourism has is the land use Planning Process which has identified and secured the key tourism attractions our industry needs to survive.

Human Resources Suggestions

Training strategy targeted to coastal First Nations. Government and community investment in training and capacity building.
Staff training inadequate for existing operators as well as expansion. Need incentives to develop apprenticeship and monitor programs. Industrial resource industries offer better $.
Promote jobs in the outdoor pursuits. These are rewarding, challenging careers that should be regarded as academic not just for people who can't make it is the office. Respectful jobs. Seasonal. The lifestyle of working a summer and a winter job is exciting, and it is an acceptable way to make a living. A lot of guides quit as they get older to take positions in more respected or reliable jobs.
Education into Rural B.C. of Tourism and Employment! in your area. Public Education - Tourism in tour Community - we currently are not visible outside of Whistler-Vancouver and 3 ski resort regions
Retaining staff skilled in their jobs is difficult for a not profit company. This is most evident as government agencies are reducing the amount of funding available for youth employment programs, and the private sector is not filling the role to train young people at skills they will use in the future. Those that can be trained proceed with new more versatile employment as soon as they can. Eco-tourism is very important to the economy of the province, but external, uncontrollable factors can destroy a business within a year, ie, no snow or ski hills, DFO closing fishing seasons, etc. At these times, the government hesitates about aid packages, reducing interest on loans, etc. Farm relief is an accepted fact by the media, public and government in times of drought, but what happens to a whale watching business during an unusually stormy season? That's just a risk of doing business.
Add staff accommodations. Pay more money
Staff - there is none. All want $5000 per month for starting with no knowledge - no experience - plus benefits. The money to pay them just isn't there.

Government needs to ask industry what they need. We are spending a lot of tax dollars for training people for jobs that do not exist.

Insurance Suggestions

Liability insurance rates jumped approximately 30% this year. Put all these costs together with the marketing costs (which are astronomical) and the cost of acquiring and maintaining boats, motors, Belly boats, waders, fly rods, reels, lines etc. and the expenses become large, very quickly.
Pass regulation that does not allow client to sue for accidents that we cannot foresee. (Alaska and 4 other states have done this recently I believe.)
Insurance has gone through the roof and they all blame Sept. 11, 2001. Because we have to have insurance (Federal) for aircraft charter and (Provincial) for compatibility. The insurance companies can change the max. because they know we have no choice.
Liability insurance - required by Crown land and Parks is increasingly hard to find and very, very expensive. (Since 9/11 especially). My liability insurance cost for the same client numbers were : 2000 $1,500; 2001 $3,500; 2002 $6,500.
Insurance companies need to step back and quit gauging their clients. Too much greed in this world.
Insurance - Wow, very difficult to find.
Insurance has become a big financial drain. 100% to 150% increases are not tolerable.
The tourism industry should take a more active role in educating insurance companies about tourism-based activities. Tourism has faced a dramatic increase in activity policies that put everyone at risk. Outfitters may choose to operate without proper insurance, or not get insurance if a claim has been filed.
I think the insurance rip off ought to be brought to a halt.
Fish guides without big insurance policies.
I feel that people should take responsibility for themselves instead of suing a ski area because they have trees that someone may run into. This American idea that everyone has a Lawyer and can go after a business for millions if the coffee is too hot (for example) scares the hell out of me.
Create an insurance company for Adventure Outfitters like ICBC where we don't have to pay for claims in other industry.
Insurance is a big issue. The west should pod its resources and find an insurer much like the adventure industry in Quebec has done.

Financing Suggestions

Regarding Financing: We work closely with Community Futures, a great organization. It is however , time that the regular banks became better business citizens and start to take part of the financials risk inherent with small to medium sized business. Regular bank attitudes are pathetic.

Operators in remote rural areas do not have access to long-term, low-interest loans for by government would help rural areas in marketing, facility upgrades, expansion of seasons, expansion of products.
Lack of capital has been an issue for twenty years. It has held us back from expanding beyond a "mom" and "pop" business.
Find partners with money. Offer long-term leases.

Weather Suggestions

Weather - high mountain areas see late season opening, early closing. June-Sept rather than May-Oct!
Addressing climate change. We need enough snow to run the snowshoeing part of our business. Climate change makes it even more uncertain.
Unfortunately we cannot control the weather. And when it is not safe on the water we will not go and of course many people will not go for an adventure if the sun not shining. The only suggestion I might make is that we try to get visitors to plan to spend a few more days here. So they may choose their activities when the weather is right.
The weather constraint in related to a global warming. Our weather patterns are already changing from what they were and this is not only affects fishing, it affects those that want to go out on these types of charters.

Other Suggestions

Increased security at borders and entry points.
More enforcement to reduce number of unlicensed, uninsured operators.
I have seen great growth in our industry of B.C. Hats. This year 2003 season is the first noticed decline. I attribute it to (international travel becoming expensive) and the number of the operators coming on line quickly and lot of our combined clientele cycle their operations. The newer ones will see increased revenues to begin with and then it will be interesting to see if we have enough market base with an aging population to sustain us all.
Although, I am required to carry insurance, etc. or an operator, an increasing concern is the number of American companies bringing clients up to BC and dogging our developed / existing training / guiding areas. These US companies do not have work Visas, insurance or the staff / professional guides to work safely. They are limiting the potential for our companies to grow as they compete with us directly for the same areas. On the other hand as guides, we cannot work in the States; it seems to be one way system! (NAFTA)
Long-term growth not important due to our age constraints. We entered into this to provide activities for ourselves to keep active. Current business is derived from Dive Charters, and in this area where minds are at times to revere to venture out into the water limits growth potential.
The low wave of the Canadian dollar has really hurt our business potential for expansion outside of our market region. Everyone thinks it is and advantage to market to Americans. Give me a dollar at par and we will be more successful.
Unify with other operators to make a bigger voice (WTA)
We employ only 2 people - ourselves and have no desire to grow. Our business is noble because of a strong local

tourist base and the internet. Most traditional media are too expensive for us.
Cell phone holes, satellite come at reasonable rates etc. If the Kootenays are left behind, the cost for welfare, employment insurance etc. will go up.

Appendix B2 – General Comments

Comments on Marketing Issues

Our business deals mainly with Adventure Tourism. We constantly hear how this is a growth market, and the Province of B.C. has huge expectations form this sector. A person looking at the Tourism B.C. Web site would see no mention of Adventure Tours, and lots of accommodation suppliers. This is a good example of how Tourism B.C. and the Provincial Gov. have done such a pathetic job of aiding and promoting the very heart of what separates what B.C. has to offer over other tourist markets. Go to www.new-zealand.com for a lesson about marketing tourism opportunities.
Tourism BC in unfamiliar with backcountry lodges and their product. This causes problems in trying to market the backcountry lodges of BC's product.
We are a working cattle ranch, family owned and operated. With three log cabins we are not a big business keeping all our records in percentages. We get out clients from word-of-mouth and through brochures in Chamber of Commerce in Fort St. John. Listing in BC Tourism Accommodation guide didn't bring too much business, a highway sign only. Most tourists don't want to come so far north. The area isn't much promoted for tourism. There are not too many facilities around to be from much interest. Our clients are most nature enthusiasts from Germany and BC hunters. Sorry we cannot give you more detailed info.
Established website Spring of 2002 hosted by BC Adv Net, VCOM, etc but for small operation it is difficult to fund the more expensive options offered by hosts. Once again a situation whereby those who can afford the advertising usually don't require it. Classic example is glossy publication put out by Canada Tourism Corp.
Northern Vancouver Island needs more effort in promotions from Tourism BC.

Comments on Land Use/Land Tenure Issues

Tired of going to meetings on issues such as land tenure. One goes for many years, nothing gets firmly resolved, so one eventually fades out of the process. Then Gov't holds meetings again and claim we had a chance to be there.
Who owns the parks? I think the people of BC not the Parks Board. I believe the Parks Board is not interested in developing of wilderness tourism. What is perfect for the park is no use of any kind. That way they have no decision to make. We are the owners of the lodge and we must get written permission to take a snowmobile into our lodge once per year to check on our investment. That is stupid. We are the caretaker of the park. We sell wilderness experience, we spend $5-7000 per year on fish management.
LAWBC cannot keep issuing tenures in the same areas without some operators going out of business. I.e. I know they want to pay for ferries, etc. but the small tour operator is not the answer.

Comments on the Marine Liability Act

The marine liability act sucks.
Marine liability act is going to shut down all small business owners and the big multi-national or larger companies will have the monopoly again. I call it the Wal-Mart syndrome.

Comments on the Research Methods of the Study

This questionnaire takes too long to fill out.
There is too much work involved to go through the age and sex of individual clients. As we handle up to 1000 clients in the summer, we do not track these details. Generally, this region is self-promoting and cannot handle huge numbers of visitors - growth is natural but limited. Client age has increased rapidly since we started in 1998. An older, softer, guest that is into a soft bed at night. The price of eco-tours is getting pretty high and the foreign person cannot afford the high-end tours. Poor access roads and dock facilities make access to the National Park fairly difficult.
No inclusion of helicopter adventure other than Heli Ski.
Thanks for doing the survey. We look forward to seeing the finding and hopefully future good results with government.
Question: Is this just one more way to spend taxpayers, money or will you affect our ability to offer tourism services in a positive fashion? I.e. Are you one more bit of bureaucracy that won't affect positive action that assists the multi small tourism business in the province?
Thanks for including us.
We don't quite fit the visual slots. We are established. All inclusive with a lot of a repeat customers.
Our business is a seasonal low volume business. Some of my answers are best guess estimates as we do not have the summarized details you see requesting.
See Paper - compilation of Issues and Policies Effecting Tourism in Coastal B.C.; Written as a submission to the SFU - works by Dec. 5/9, 'Coastal Tourism: Issues and Policies'
I would like to see the profile of micro businesses within the industry elevated in both the governments eyes and the tourism associations. I hope the results of this survey are broken down by revenue generated. I'd be curious to see how different the responses are.
As we are not for profit society operating this business, it may skew the results since some factors (taxes etc.) don't apply. Also, we use funding sources not available to a for profit business, while operating in the same industry. Thank you for gathering the statistics, could we get a copy of the final report?
This study was rather a challenge. Figures for 2001 are a little out of order with general statistics for my business, as we were lilt hand by 2 factors out of my hands - Foot and Mouth Disease in Britain - hence, I could not allow any British riders that year - plus 9/11 which put a stop to overseas visitors. As previously mentioned, my business, by choice is alone-woman thing - therefore I do not have time, financial capacity for promotion except from local and B.C. based outlets. Since 2001 we now do offer accommodation - (single family ranch stay)as longer-stay guests seem to be the only way to increase revenue for my small-scale operation.
As often happens, many questions do not or only particularly apply to the wide variety of enterprises.
I find question 20 on Marketing was difficult to answer as several of the points overlap. For example, we have experienced enormous media attention in the past 3 years, however, most of the articles that are written drive the enquiries to my website and 1-800 number which in the questionnaire is duplication.
Study is timely!

Hoping this study will help slow the constraints small tour operators have due to gov't and lack of support for the tourism industry. To start this small business, I was not able to receive any funding because I was employed (part time). The only way to receive start up capital support was to be a social assistance! Go figure!
I have run a combined business; Retreat (with wilderness school) and Buffalo Ranch. The Buffalo are a tourist attraction but we also sell 100% Natural Meat. We left out the figures on an income because it is too complicated to separate all the different aspects of our business. The information we filled out seems more relevant to us anyways. Our business has evolved and changed in four years and continues to do so. We now have a guesthouse as accommodations. This should affect our business alot. We are now a lot different than in 2001 so your questions would be answered much differently if you were asking about today.
Please be aware that this is a First Nations owned and operated business and this is reflected in the answers as a tourism professional, one who is only contracted by the First Nations to manage this company, my own answers may be different, i.e. question concerning constraints to growth. Generally more work and lobbying needs to be done to educate to the province and decision makers the value and importance of tourism. And that BC's tourism product is ultimately pristine wilderness. Other resource extraction industries are important but need to be truly sustainable and based on EBM.

Comments on Fishing/Fisheries Issues

In this business we are dependent on the numbers of Salmon living in and returning to our area. The tourism dollar has proven to be more beneficial to the B.C. economy yet. The over existing commercial fishing pressure on the resource has always had a detrimental effect on the whole picture. We are beginning to see generally larger returns Coast Wide due to in part. The reduction of commercial pressure on sports designated Salmon. If the commercial sector regains access to Chinook and Coho Salmon. I see stocks being reduced to a point where tourists will not return to Fish.
Ours is a high and salt water fishing resort that is dependent on natural setting, view scopes are critical as well as an opportunity to view wildlife. Fishing is key, but there is good fishing elsewhere on the coast, so the difference we offer is quality fishing in a wilderness setting ..... if we loose the wilderness setting to clear cuts then we might as well move to Campbell River.
The exemption of fishing resorts on small lakes who rent small fishing boats - to have to fill a 2-page Review Boat Safety Column List.
As I mentioned previously, I mainly rely on local repeat clients for my business, but I am somewhat unique. Most operators in the area rely on tourists for 60 to 100% of their business. Our location right within Vancouver affords a very large number of tourists the opportunity to get out on the water and experience salmon fishing in BC. The potential is here to expand this local industry by 100 or 200%, but it all depends on salmon stocks and the political issues with the sockeye fishery. It can really become a show case for all of “Super Natural” BC with a bit of foresight and enhancement dollars, but the way things have been going in recent years (fisheries budget cuts, native / fisheries / sockeye politics) one has to wonder if the industry will even survive another five or ten years.

My business is small and carried out as a hobby more than anything. Most serious salmon fisherman no longer come here. Family group, i.e. out of town folk on vacation still like to use my services but limits for rock cod (1), ling cod (0) have discouraged many of them. We take out very few people who are solely interested in nature. Most people want to harvest something for their investment.

Comments on Government Regulation

We now reached retirement age and have given-up any hope for changes. (See q 32)
Spin off dollars need to be recognized when finding value new money (outside of country) if there is a positive impact. The cost of doing business on Crown land should be nominal. Enjoy the spin off dollars don't cripple the industry by cease fees.
Small business is burdened by tax collection! We collect: GST, PST, Hotel Tax, Fishing Lic. and pay taxes for the privilege.
The #1 factor for all camps is exuberant leases and property tax - it's killing us one by one - The Government makes more money annually through lease, property tax, GST and Sale of fishing licences than my net income. Should be calculated on % of gross income, NOT LAND VALUE!
When we started our business 26 years ago, we enjoyed the good times and bad. But over the years the government regulations in particular have constrained our business and all they care about is covering their necks. Common sense is out the window and most of my time is taken up with satisfying government paperwork. It's not fun anymore!
My business has suffered the last 5 years because of politics and unequal access to the resources.
Seems every time we turn around the government wants more money out of us. Now, we are supposed to take an $800 course at Malaspina college out of town so we know how to run our boat or look after people. What a pile of crap. We have many people chartering without licenses or insurance of any kind, but they slip through the cracks. Maybe that is what we should do. Nobody in the government or your office is sending us any business to pay for our bills or hidden taxes.
I do all of my maintenance (labour) on my vessel. I find that parts are very expensive and fuel eat up any profit that could be made in the sightseeing and fishing business. Also, the clients for fishing have dropped at least 50% in recent years as fishing has been so severely regulated by Dept. of Fisheries, like closing the catch of lingcod in Area 16 for 2002! I have been fishing on the coast my entire life and find there are lots of Cod (Ling) in all areas. Thank you, Joe Adams. P.S. This will probably be my last year in business.

Comments/Explanation of Specific Business Issues

We are a small home based business which offers a high standard of fishing adventure, with state of the art equipment. As the skipper I have taken many Canadian Power Squadron and Coast Guard courses and training sessions to ensure my clients are safe and comfortable.

We are a family run business. We provide lodging in the form of cottages and wharfage, freezing facilities and a campfire setting for our guests as well as guided fishing. Our facility is a drive to sportsfishing camp that is family oriented where guests can operate their own boats. We offer the same type of facility as Large fishing camps but at a far lower cost which makes us more family oriented as it makes it affordable to families. We combine an outdoor experience while providing tourism approved accommodation.
The first 5 years have been growing process. Physical development of property, market trails determine who our clients are and what do they want to do. After analyzing our personal resources and 'desire' on how big we would like to become, we have entered our next phase, 'we have a focus on our clients, market, product, we will offer, and positive visitor experiences. Government regulations and industry factors change constantly and we have learned to be a flexible and adaptive business plan along with those changes, positive or negative.
We have a small fly-in fly-fishing and wilderness guiding operation. Revenue was up significantly in 2002 but expenses were also, particularly insurance. Our own and the airlines which raised the airfare a lot. We weren't able to recover the raise in fees and now this year the insurance has gone up again and the fuel costs. So it looks like a tough year for expenses. We have brought a lot of people up to our camp who stay at least two or three days, usually more at other places in BC, good hotels, use of transportation facilities, etc. They generate a lot of additional revenue for the province, it is totally non-destructive methods of generating income from nature.
We are researching options to invest outside of Canada in areas where we perceive constraints to be fewer.
Our business has been a family business just slowly building up each year. We have been trying to build up this without going into details. Everything we make in income is still going right back into repairs and putting up cabins, etc. So we are still looking at a few years of struggle.
People seem to want to get away from the city environment. We offer: Absolute wilderness, clean air and water, no phones, no electricity, no B.S.
I anticipate a steady growth in old business, with clientele being mostly American. The dollar exchange makes my business very affordable to them as was shown during this year. The marine liability issue is a big one with us small operators. A small thing like overly increased insurance premiums can destroy a small business such as I have tried starting. I think this study is very important.
We are closing the operation 2003 as our other business requires attention. Moving customers over. Our other operation is expanding, also, a lodge in same sound.
2001 was not a good year for my business due to Sept 11th. My guests are 100% American and come to fish for Steelhead in Sept and Oct. I lost about 1/3 of my business due to the terrorist attacks. In 2002 my income was over 45,000 with expenses about the same as 2001.
I have spent 40 years teaching others how to enjoy and respect our environment. My concern is the opposition to tourism by self-appointed urban experts.
2001 was a dry year and when the creek ran dry we were left high and dry again in addition to Q.32. I'm a natural history and cultural interpreter, thus we used our horse to get the rider out into the 'wilderness' for a real hand-on experience, relating to the local eco-zone and how people utilized its resources over the past 12,000 years. The responses are a compilation of our outfit's operations during the late 1990's.

This survey was done for 2001 - we are now entering 2004 with our wholesalers. During the last 5 years, there have been countless problems, out of our control, that have had a devastating effect on tourism as a whole. The cities have disclosed up to a 30% decrease (over this time) - with an incline being apparent. Well, the rural areas outside the 'Golden Triangle' are facing a 50-60% decline over this same period of time. The government should be spending more money on financial aid here at home rather than sending $100M for reparation aid to a country we had no part in when the war was concerned!
Growth Since 1994, 1994 (first year), 1995 10%, 1996 10%, 1997 10%, 1998 10%, 1999 10%, 2000 30%, 2001 30%, 2002 20%, 2003 to 2005(Projected) 20%
We do trail rides with horse up to 10 days and hove our problems at the moment to ride 320 hours through Crownhead. We try to leave all our crops clean and to respect the nature. In the last year, we had more and more motorbikes in the Crownhead. I have seen deep, they don't how to run if they are closed by motorbikes. People on our long trip go for the nature to see wildlife in their own area. If we bring the civilization from the city in the nature, we need not nature anymore.
We take any type of a trip people want in the Rocky Mt. Trench of Northern B.C., Kechika, Turnigan, Gataga, and Frog River drainage systems. Have been in the Rocky Mt. Trench of the Kechika and Turnigan country since 1942. Know it all like you know the back of your hands.
Maintain an operating tourism land base is key. Need to look at long term and sustainable nature of tourism business as opposed to short term, unsustainable nature of resource extractate industries. Our family business has operated successfully and profited for the last 45 years, contributed significantly to the economy over that time period and could continue if operating environment is maintained.
This is a small business being operated as a sideline for ourselves in hopes of eventually developing into a venture that could hopefully supplement our seasonal income. We both are presently employed seasonally in the forest industry. Our hope is to reduce our dependency on this uncertain sector so that by being involved in 2 sectors (forestry and tourism) we could have a bit more stability. We have no idea about marketing and would be very interested in courses or programs aimed at small home business to develop marketing plans etc. We run a ski touring lodge and have taken a lot of training etc. and believe we have a good product to offer hence all the repeat business. As the economy is so poor here though, we would like to target more Americans and Europeans. We just don't know how to go about that.
I have had to subsidize start-up of business by working all of my off-seasons. I could generate more income if I extended into off peak time but my full time job limits time availability right now. I would consider keeping our boat working if I could find excellent captain and crew but I worry about my investment and guaranteeing the quality of my product. My wife and I love the LIFESTYLE.
Our nature-based tourism business is located in a remote area, because of this limited access. Our almost pristine environment is protected. If accessibility were increased, our income would also be, but in the long term competition and pressures on our unique area would also increase. We moved here for a lifestyle change and know to keep our village special. We and other tourism business will never grow too large.
A summer operative license is imperative for our business. This is currently negotiated.
We like to combine the best of both world's by combining fine dining in the heart of the Chilcotin Wilderness. The same could be said for tourism B.C. to combine the best of Urban and Rural B.C. to have that supernatural B.C. label, the rest of the world comes to visit.

We are a whale watching business that travels among the Gulf and San Juan Islands in the Straight of Georgia looking at the resident Orca Whale population and other marine mammals such as the sea lions, porpoises and birds. Our main concern is that these populations are able to continue to live without being hampered.

General Comments

Having a competent industry proven marketing / business consultant who could accurately evaluate the small eco-tourism businesses and get them on a realistic and profitable footing would greatly improve the industry. This would not have to be a free service.

Appendix C - An Input Output Primer

Prepared by:

Jim Johnson of Pacific Analytics

Pacific Analytics Inc.
P.O. Box 5103
Victoria, B. C. Canada V8R 6N3
Voice/Fax: (250) 370-1775
Email: pacanalytics@pacificcoast.net

National Accounting (also termed Economic Accounting) assumes a company undertakes two steps in its production process. First, it purchases material inputs from other industries; and second, it transforms those material inputs into finished goods (or services), ready for resale. Take as an example a Restaurant. Restaurants buy fresh vegetables, meat, etc. from the Agriculture sector. Using other material inputs (e.g., electricity, cooking oil, etc.), it transforms them into finished dishes, which, in turn, are sold at a selling price higher than the cost of its inputs. The difference between the selling price and the material input cost is the "mark-up" or "value-added". This value-added is used to pay for the kitchen and wait personnel, any taxes levied by governments, the depreciation of equipment, any interest costs the restaurant may have, and will also generate, the owner hopes, a profit.

National Accounting asserts that the value which the restaurant sector adds to the economy (hence, the term "value added") is equal **not** to the total revenues of Restaurants, but only to this "mark-up" value. That is, the value of an industry to an economy is the difference between the value of its output (effectively, total operating revenues) and the cost of its material inputs. In this way, the Restaurant industry does not claim the value of the agriculture inputs it uses, which should rightly be accounted for by the Agriculture industry. As a result, there is no double counting when measuring the value of the entire economy.

In other words: the value-added of the commercial nature-based tourism industry is the revenue from all of its sales to clients (output) minus all of its costs for payments to other firms for goods or services (material inputs), or:

Value Added = Output (or Final Sales) - Material Inputs

Another way of defining value added is that it is the sum of an industry's payments to employees, for indirect taxes, for depreciation and interest costs, and for profit:

Value Added = Labour + Indirect Taxes + Depreciation + Interest Costs + Profit

The resulting value-added of any firm (or industry) is available to be shared among labour (wages, salaries and benefits), indirect taxes and "operating surplus." The operating surplus itself is shared between payments for the use of physical capital (depreciation), payments for the use of monetary capital (interest costs), and payments (profits) to the owner(s) of the enterprise. Value-added is an industry's contribution to, or ***direct impact*** on, the economy. And the sum of value-added of all industries is termed the country's Gross Domestic Product (GDP).

An important distinction needs to be made between Financial Accounting and National Accounting. Under financial accounting, an industry which has a high value added (i.e., contributes a lot to the economy), can be unprofitable if, for example, its payments to labour or for interest costs are too high.

Alternatively, low value-adding industries can be very profitable to their owners, depending on their usage of labour and their capital structure.

Economists have standardized the measure of these flows and the inter-relationships of inputs and outputs among industries through the concept of Input-Output (I/O) analysis. The **MAKE** matrix (Table A2) identifies the various types of output the sector produces. The **USE** matrix (the bottom section of that same Figure) highlights all of the various types of inputs used to produce that output.[19] One can readily determine from these tables that subtracting total Material Inputs from total Output leaves Gross Domestic Product (GDP). This GDP is equal to the sum of Wages and Salaries, Benefits, and Operating Surplus.

The GDP-to-Output ratio is a measure of the direct contribution to the economy *per dollar of output*. Clearly, an industry that requires a lower dollar value of inputs to produce a given dollar of output is a higher value-adding industry. One must note, however, that a higher GDP-to-Output ratio does *not* imply that the industry is more important to the economy. It merely states that for every dollar of output the impact on the economy is greater. Obviously, when examining an industry's importance to an economy one must also take into account the total output of the industry. There is, however, another important characteristic of an industry that must be examined if one is to determine the importance of a sector to the local economy: its ***linkages*** to other industries.

When inputs such as fresh produce or meat are purchased by the Restaurant sector, the industries supplying those goods and services (in this case farmers, food manufacturers, and food wholesalers and retailers) increase their own economic activity. This increased activity itself creates demand for other products. Farmers, for example, may need more fertilizers for their land and more petrol to run their machinery. Food wholesalers may require additional box material. The demand for extra fertilizers and petrol and box material will, in turn, stimulate activity in the fertilizer, petrol and box industries. The increased activity in the fertilizer industry will create greater demand for its own inputs, perhaps some chemicals. And so it continues down the chain of industries. The sum effects of all this additional economic activity are known as ***indirect impacts***.

[19] Output is closely associated with industry revenues and client spending, but there are important differences. Likewise, the inputs used by the Guide Outfitting Industry are highly related to industry expenses. But, again, the differences are important. For a summary of these differences, see the next sub-section: *Technical Differences*.

Table A2. Example of MAKE and USE Matrices

MAKE MATRIX	**2002**	**2001**	**2000**
Accommodation Services*	67,202,330	65,608,428	62,046,347
Other Activities	1,770,996	2,253,910	2,443,441
TOTAL OUTPUT	**68,973,325**	**67,862,338**	**64,489,788**
USE MATRIX	**2002**	**2001**	**2000**
Agric, Forestry, Fishing & Mining	$502,421	$457,503	$449,423
Utilites	$206,975	$221,603	$208,591
Constuction	$1,771,285	$1,806,699	$2,354,769
Food & Beverage Manufacturing	$2,449,916	$2,449,283	$2,269,300
Textile, Clothing & Leather Manufacturing	$12,431	$16,064	$14,814
Wood, Pulp and Paper Manufacturing	$71,828	$92,821	$85,599
Petroleum and Coal Products	$768,922	$757,305	$779,345
Chem, Plastic and Rubber Manufacturing	$201,184	$259,985	$239,755
Non-Metallic Manufacturing	$59,521	$76,917	$70,932
Fab. Machinery & Equipment Manufacturing	$79,707	$103,003	$94,989
Other Manufacturing	$738,486	$779,470	$716,575
Wholesale Trade	$1,006,303	$1,016,773	$1,004,525
Retail Trade	$611,288	$948,441	$887,489
Transportation Services	$5,417,250	$4,789,622	$4,735,112
Informational & Cultural Services	$804,445	$815,248	$785,376
Finance, Insurance & Real Estate Services	$1,820,438	$1,799,317	$1,918,030
Business Services	$1,053,374	$927,093	$922,929
Education and Health Services	$288,952	$245,398	$230,347
Community, Personal & Repair Services	$366,008	$378,243	$360,484
Operating, Office and Café Supplies	$636,049	$679,271	$613,486
Travel & Entertainment	$800,442	$726,625	$711,103
Advertising and Promotion	$2,544,359	$2,943,948	$2,941,458
Transportation Margins	$151,840	$154,988	$150,445
TOTAL MATERIAL INPUTS (less taxes)	**$22,363,422**	**$22,445,620**	**$22,544,874**
Commodity (Product) Taxes	$764,198	$762,644	$784,687
Indirect (Production) Taxes	$526,023	$522,686	$539,972
Federal Taxes	$41,721	$28,536	$39,709
Provincial Taxes	$4,591,194	$4,154,573	$4,421,436
Municipal Taxes	$199,557	$173,229	$182,799
TOTAL MATERIAL INPUTS	**$28,486,114**	**$28,087,288**	**$28,513,477**
Wages and Salaries	$29,327,752	$28,848,122	$25,480,871
Supplementary Labour Income	$1,389,305	$1,386,204	$1,194,577
Operating Surplus	$9,770,154	$9,540,724	$9,300,863
GDP	**$40,487,211**	**$39,775,050**	**$35,976,311**
GDP-TO-OUTPUT RATIO	**0.587**	**0.586**	**0.558**

Source: Data taken from *The Guide Outfitting Industry in British Columbia: An Economic Analysis of 2002*, prepared by Pacific Analytics Inc., December, 2003.

Such indirect impacts (also known as "multiplier effects" or "spin-offs") on the economy clearly are important. They should not be ignored (as they usually are with financial accounting) if we are to measure the true benefits of an industry to an economy. An interesting observation is that, while it is true that high value-adding industries have low indirect impacts, those industries with relatively lower direct impacts have relatively higher indirect impacts. This is because, by definition, low value-adding industries consume more inputs per dollar of output and thus have a greater impact on their supplying industries. It should be noted, however, that the level of indirect impacts is highly influenced by the type of goods and services demanded and by the propensity of the companies (or the economy) to import those particular goods and services. The higher the propensity to import the required goods and services, the lower will be the effects on the local economy. Indeed, an industry that imports all its inputs will have virtually no indirect impact on the economy, save the small level of distributive activity (wholesale, retail and transportation margins) the imports may generate.

Increased industrial activity has a third effect on the economy. When additional wages and salaries are paid out, those dollars (appropriately adjusted for taxes and savings) are available to be re-spent on consumer goods and services. Take, for example, an additional $1 million in wages resulting in say, an increase of disposable income of $750,000. Depending on the spending patterns, this may result in extra consumer spending of say, $500,000 in the retail sector (the remaining being spent in the entertainment sector, restaurant sector, etc.). This will increase the economic activity of the manufacturers and other suppliers of consumer goods who, in turn, will increase their own employment and their own wage payments. The sum effects of this additional activity due to increased wages are known as ***induced impacts***. Again, it should be clear that, like indirect impacts, induced impacts are highly influenced by the economy's propensity to import, as well as by taxation and savings rates, the level of wages paid to employees and the level of capacity at which the economy is operating.

The question arises: given that there are many levels of indirect and induced spending which affect many, many different firms and industrial sectors, how can we estimate these impacts on the economy? Fortunately, economists have developed a method to estimate these impacts, by using the same input-output tables to which we already have been introduced.[20] However, since the base information is coming from financial statement data directly provided by businesses, it is critical to understand how financial statement data are re-structured to meet National Accounting standards. These differences are discussed below.

Technical Differences

Although the National Accounting (Input-Output) measurement of the value and impacts of Guide Outfitting begins with the same set of data as the financial results of the industry, a number of adjustments are required in order to conform to strict National Accounting standards. To avoid possible confusion, these technical differences between Financial Accounting and National Accounting should be understood. The intent here is not to provide a comprehensive or definitive discussion of these differences, however, but rather to provide a cursory overview. For a more in-depth discussion of the differences and of the methodology underlying National Accounting, the interested reader is referred to the National Accounting compendium published by the UN.[21]

---

[20] For a detailed discussion of the underlying mathematics of Input-Output analysis, see *Input-Output Analysis: Foundations and Extension*, Ronald E. Miller and Peter D. Blair, Prentice Hall, 1985

[21] *System of National Accounts*, Statistical Papers Series F No 2 Rev. 4, New York, 1993

The following outlines the major differences:

1. The first and perhaps most important difference is that National Accounting measures all non-tax related revenues and expenses related to production, even those not itemized on the corporate income statement. Hence, gratuities paid to staff are included as output (in the case of the Guide Outfitting Industry, as an increase in sports revenues). This increases output but not material inputs, and therefore it increases the estimate of GDP (Output – Inputs) by precisely the amount of gratuities. Using our other definition of GDP (GDP = indirect taxes + wages, salaries and benefits + operating surplus), we see that the increase in GDP is reflected in an increase in wages and salaries equal to the reported gratuities.

   Another (usually) off-budget item is an estimate of the value of imputed room and board. On the Output side there is an increase in lodging revenues and, since the provision of room and board is a value to the employee, it is considered equivalent to a wage subsidy, and thus contributes to overall GDP. Normally, the cost of food is already accounted for within the financial statement, thus the net impact on GDP is equal to the value of the imputed room and board. Statistics Canada has standard values that it uses to assess the value of this room and board and it is that standard that is used in this report.

2. At the same time, National Accounting omits revenues not directly related to the production process. Generally, these incomes are limited to interest and dividend earnings, but include non-operating revenues related to rental incomes, commissions and the like.

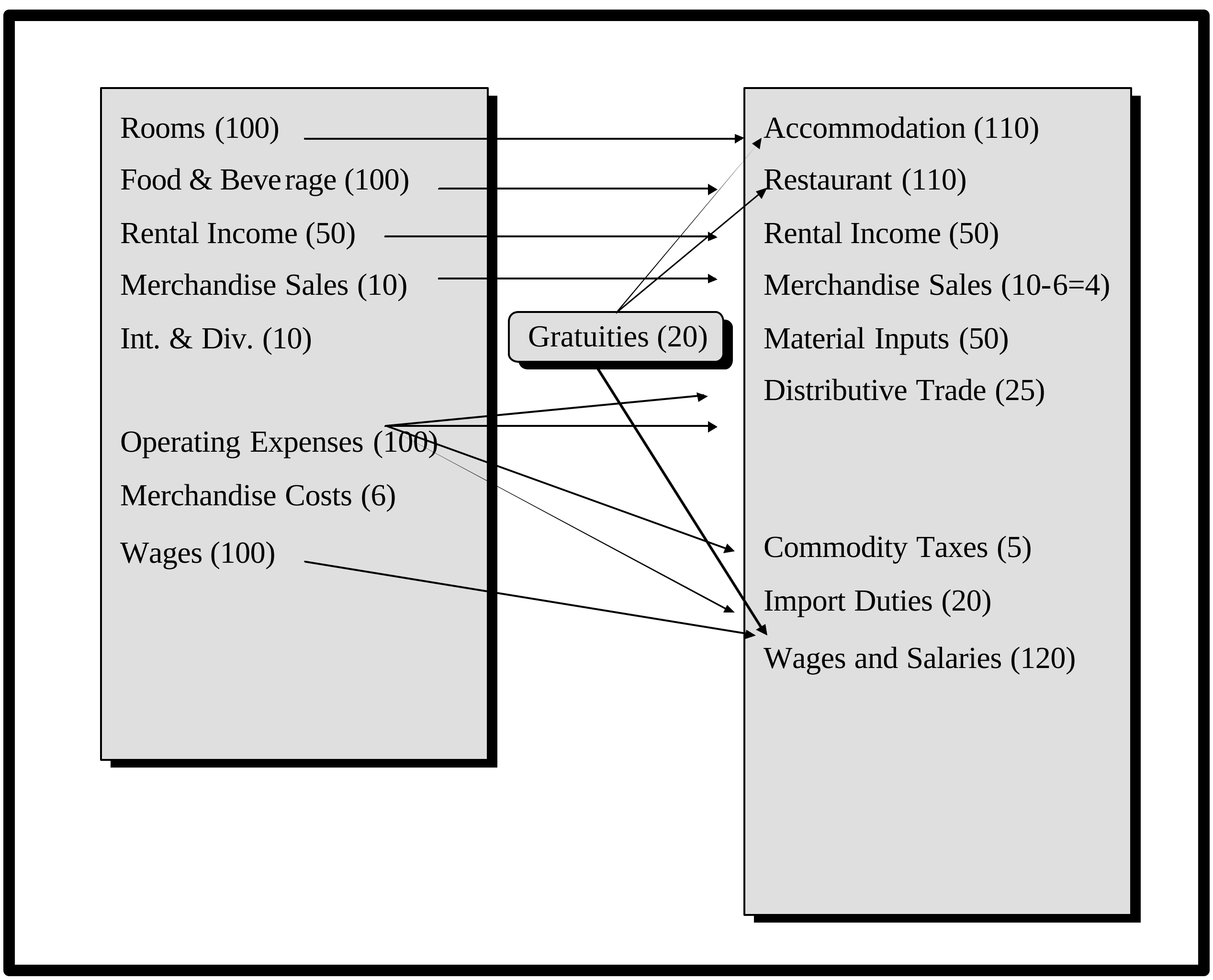
3. A third difference is that, under National Accounting, the value of each input in the USE matrix is stated in "producer" prices. That is, all wholesale, retail, and transportation costs included in the "purchaser" price of a commodity are removed, as are all commodity taxes, indirect taxes and import duties. These "distributive and tax margins," as they are called, are explicitly recognized in the USE matrix as separate line items. The reader should understand that this does not in any way reduce the total cost of inputs to the industry; it simply re-assigns the costs to different input categories.

4. A fourth difference lies in the treatment of merchandise sales. National Accounting treats the purchase of merchandise as partly a purchase from the manufacturer of the good (equal to the cost price of the good less distributive and tax margins) and partly a purchase from the retailer (equal to the mark-up for the good). Consequently, in an input-output table for a sector selling some retail goods, there is no recognition of the cost of the merchandise on the input (USE) side, and only the mark-up value is recognized on the output (MAKE) side. The cost of the merchandise is captured in the Manufacturing sector as output. It is for this reason that some analysts recognize certain manufacturing industries as **direct** tourism, even though tourists do not actually buy any goods directly from those manufacturers.

5. Related to this unusual approach to merchandise sales is the treatment of "service margins." When a firm purchases a product (such as liquor, beer or wine) and re-sells it with a mark-up without any fundamental change to it, National Accounting recognizes only the mark-up or "service margin" as output. It then treats the purchase cost of the product (less distributive and tax margins) as an output to the original producer of the good. The main instance that affects most industries (besides retail sales) is alcohol sales. In this case, only the service margins are recognized as output, and the costs are assigned to the alcohol manufacturing sectors (beer, wine and liquor / distillers). In effect, then, the alcohol manufacturing sector is a direct provider to tourists under National Accounting principles.

The following simplified diagram may help explain some of these differences. On the left hand side is a financial statement containing revenues for rooms, food and beverage, rental income, merchandise sales, and interest and dividend payments. Room and Food & Beverage revenues are mapped directly into the Accommodation and Restaurant categories, but with the addition of (say, 10%) gratuities. Rental Income is part of the production process and therefore is entered on the National Accounting side. Merchandise under National Accounting is the net value. Interest and Dividends are not part of production, and they are excluded from the right hand side. Operating Expenses are mapped and broken down according to their constituent parts: the cost at the factory gate, the distributive (wholesale, retail and transportation) costs, and the various taxes and duties. Wages go directly into the Wages and Salaries component, but include the gratuities.

Financial Accounting **National Accounting**



Appendix D - Surveys

Appendix D-Telephone Survey

Nature-Based Tourism	**Contact: Kim Short**
Population Identification - Phone Survey	CGT Research International
	Phone: 604.681.0381
Tourism British Columbia	Fax: 604.681.0427
	Email: kshort@cgtnet.com
Final	#1454

[INTRODUCTION:] Hello, my name is __________, from CGT Research, a professional research company, and I am calling on behalf of the Wilderness Tourism Association and Tourism British Columbia.

May I speak to [CONTACT NAME IF AVAILABLE]…OR…the manager or owner of [INSERT BUSINESS NAME]?

[REPEAT INTRODUCTION IF NECESSARY]…We are undertaking a survey of all tourism operators who work in nature-based tourism.

This survey will only take ten minutes of your time and your responses will be kept completely confidential. No other government agencies will ever have access to the data and no individual operator will ever be identifiable in the results.

Survey Purpose/Persuaders [AS NEEDED]:

- No current measures of the size of the nature-based tourism sector exist. The purpose of this survey is to accurately identify the economic size of all components of the nature-based tourism sector.
- Measuring the size of the overall sector is critical in ensuring that nature-based tourism operators have a strong voice in determining what happens to provincial natural resources, along with other resource dependent industries like logging. It will also provide a baseline from which changes in the sector can be measured – things like number of operators, revenue growth and tourist volume.
- It is very important that we survey as many operators as possible in the industry. The Wilderness Tourism Association and many other sector and regional tourism associations across the province support this project, and may have been in touch with you directly about this survey. You may also have received a letter from the Wilderness Tourism Association outlining this project and its importance to the sector and the industry.
- Call Richard Porges at 250.356.9936.

[END PERSUADERS]

May I ask you a few questions now?

Arrange call back if necessary.

[HARD OR SOFT REFUSAL:] May the Wilderness Tourism Association or Tourism British Columbia contact you about this project?

1=YES [TO BE FORWARDED TO WTA OR TBC]

2=NO

97=DON'T KNOW/UNCERTAIN [TO BE FORWARDED TO WTA OR TBC]

Section 1: Fit with Operational Definition

My first few questions are about your business and your guests or clients:

1. Nature-based activities are any activities that depend directly and focus on the natural environment. Is your company's primary source of revenue from people who are engaging in nature-based activities? *(IF NEEDED: "primary source of revenue" means that you generate more revenue by providing products and/or services to people engaging in nature-based activities than from any other line of business.)*

   1=YES

   2=NO [THANK AND END SURVEY]

   97=DON'T KNOW [PROBE…IF STILL UNCERTAIN, ASK IF SOMEONE WHO MAY KNOW IS AVAILABLE, OR SCHEDULE CALL BACK FOR NEW R]

   98=REFUSED [THANK AND END SURVEY]

2. Tourists are travelers who are outside of their usual environment on an overnight trip that lasts at least one night. Though they may not have stayed overnight with you, approximately what percentage of your 2001 revenue was generated from tourists engaging in nature-based activities?

   ___________% of 2001 revenue [IF 0%, THANK AND END SURVEY]

   97=DON'T KNOW

   98=REFUSED

3. Is your primary business in retail sales, for example, in selling equipment or other supplies for use by nature-based tourists or operators?

   1=YES [THANK AND END SURVEY]

   2=NO

97=DON'T KNOW [THANK AND END SURVEY]

98=REFUSED [THANK AND END SURVEY]

4. a. What is the most frequent nature-based activity your clients engage in? [DO NOT READ UNLESS 2-3 EXAMPLES ARE NEEDED, CODE TOP THREE AS MENTIONED.]

   b. What is the second most frequent nature-based activity your clients engage in?

   c. What is the third most frequent nature-based activity your clients engage in?

   1=ATVING

   2=BIRD WATCHING

   3=CANOEING

   4=CAT SKIING/CAT SNOWBOARDING

   5=CAVING OR SPELUNKING

   6=BACK COUNTRY/TOUR SKIING

   7=CROSS COUNTRY/SKATE SKIING

   8=CULTURAL OR HISTORIC TOURISM (NATURE-BASED)

   9=CYCLING/MOUNTAIN BIKING

   10=DOG SLEDDING

   11=EDUCATION (NATURE/OUTDOOR)

   12=HANG GLIDING/PARA-SAILING

   13=HELI-SKIING/HELI-SNOWBOARDING

   14=HIKING/BACKPACKING

   15=GUEST RANCH

   16=HORSEBACK RIDING OR TRAIL RIDING

   17=HUNTING

   18=LLAMA TREKKING

   19=POWER CRUISING

   20=RAFTING

   21=ROCK CLIMBING/ MOUNTAINEERING/ ICE CLIMBING

   22=POWER/SAIL YACHT CRUISING

   23=SAILING/WINDSURFING

   24=FRESH WATER FISHING

   25=SALT WATER FISHING

   26=SCUBA DIVING OR SNORKELING

27=SEA KAYAKING

28=SNOWMOBILING

29=SURFING

30=TRANSPORTATION SERVICES RELATED TO ANY NATURE-BASED TOURISM ACTIVITIES - GENERAL (AIR, RAIL, BUS ETC.)

31=WHALE WATCHING

32=WHITE WATER KAYAKING

33=WILDLIFE OR NATURE OBSERVATION INCLUDING PHOTOGRAPHY – GENERAL

34=RIVER TOURS

35=OTHER 1, SPECIFY:

36=OTHER 2, SPECIFY:

37=OTHER 3, SPECIFY:

97=DON'T KNOW

98=REFUSED

5. a) Approximately how many tourist clients did you have in 2001?
   _________# of clients

   b) Approximately what percentage of your 2001 tourist clients would have been engaged in activities that lasted a half day, that would be less than four hours?

   ___%

   c) And approximately what percentage of your 2001 tourist clients would have been engaged in activities that lasted a full day, that would be four hours or more?

   ___%

6. a) Compared to 2000, did your total <u>tourist</u> client-days increase, decrease or stay about the same in 2001?

   1=INCREASE

   2=DECREASE

   3=STAY ABOUT THE SAME [GO TO Q8]

   97=DON'T KNOW [GO TO Q8]

   98=REFUSED [GO TO Q8]

b) By approximately what percentage did your client-days [INSERT RESPONSE FROM Q7a]?

_______________%

97=DON'T KNOW

98=REFUSED

7. a) My next few questions relate to your company's staffing. Please include yourself, any family members who work at your company, and all other staff members in the responses you provide. During what months last year did your company employ full-time, part-time or contract staff [SELECT ALL THAT APPLY]?

   1=JANUARY

   2=FEBRUARY

   3=MARCH

   4=APRIL

   5=MAY

   6=JUNE

   7=JULY

   8=AUGUST

   9=SEPTEMBER

   10=OCTOBER

   11=NOVEMBER

   12=DECEMBER

8. A full-time employee is a permanent or contract staff member who usually works 30 hours or more per week. How many full-time employees did your company employ during the month of [IMPORT EACH MONTH IN TURN].

   RECORD RESPONSE FOR EACH MONTH WHERE COMPANY HAD FULL TIME EMPLOYEES. FRACTIONS ARE ALLOWED.

   97=DON'T KNOW

   98=REFUSED

9. a) A part-time employee is a permanent or contract staff member who works fewer than 30 hours per week. How many part-time employees did your company employee during the month of [IMPORT EACH MONTH IN TURN].

   RECORD RESPONSE FOR EACH MONTH WHERE COMPANY HAD PART TIME EMPLOYEES. FRACTIONS ARE ALLOWED.

   97=DON'T KNOW

   98=REFUSED

Section 2: Industry Monitoring

10. This phone survey is the first step in building a nature-based tourism industry monitoring program. The next step is to implement an ongoing measurement program among a sample of industry operators. This step will be made up of two parts: one detailed survey, and then very short monitoring surveys that will occur a few times each year among a random sample of operators.

    Would you be willing to participate in the first mail survey?

    [IF NEEDED]

    The data collected through these surveys will be used to calculate the economic impact of nature-based tourism in British Columbia at the provincial level. Visitor volumes, revenue and guest origins will be reported at regional and sub-sector levels.

    Only aggregate results will be reported, and data from individual operators will be strictly confidential – no other government agencies like BCAL or WCB will ever have access to the data and no individual operator will ever be identifiable in the results. Reports will only be shared with operators who agree to participate in the ongoing monitoring program.

    [END]

    1=YES

    2=NO [AFTER ADDITIONAL PERSUADER APPLIED - GO TO Q15]

    97=DON'T KNOW

    98=REFUSED

    PERSUADER

    [FOR ANY REPONSE OTHER THAN "YES":] This survey will be extremely important in helping to secure the long term viability of the nature-based tourism industry. High operator participation in the start-up survey will provide you, industry associations, and other tourism stakeholders with excellent tools for arguing for important sector issues like land use planning. With that in mind…[REPEAT Q11, QUESTION ONLY.]

11. May we contact you every three months for the short monitoring survey?

1=YES [GO TO Q14]

2=NO

97=DON'T KNOW

98=REFUSED

12. May we contact you either bi-annually or on an annual basis for the short monitoring survey?

3=BI-ANNUALLY (TWICE A YEAR), OR

4=ANNUALLY

5=OTHER, SPECIFY:________________

6=NOT AT ALL/WILL NOT PARTICIPATE [GO TO Q15]

97=DON'T KNOW

98=REFUSED

13. Which of the following reporting methods would you prefer for participating in the shorter monitoring survey, reporting:

[BEGIN RANDOM]

1=by mail

2=through a password protected, confidential web site, or

3=via email

[END RANDOM]

95=OTHER, SPECIFY:________________

96=NONE [PROBE: "is there an other method that you would prefer?"]

97=DON'T KNOW

98=REFUSED

14. An important part of understanding the total economic impact of nature-based tourism in the province will be measuring the total tourism expenditures of your guests. This will be done by distributing consent cards to guests throughout the season The pre-paid consent cards will only collect basic guest contact information and be mailed to Tourism BC. A sample of guests giving consent to participate in this project will then be surveyed.
 The first guest survey will take place later this season and include questions about media usage, demographics, and nature-based tourism habits. The results of these questions will only be shared with operators who participate in the guest portion of the program.

IF NEEDED:

Our understanding is that operators will be asked to place the cards in the mail.

Depending on the number of guests you have, your company would distribute between 100 and 400 cards over the course of the months you are open.

Examples of guest expenditures include gas costs, meals, and accommodation in BC before and after your guest's nature-based experience. In order to collect this information, it will be necessary to have your guests answer several questions about their experience.

Your guests' anonymity and confidentiality will be assured in the reporting of results, and their information will never be used for any other purpose.

[END]

Would you be willing to participate in the guest survey by distributing consent cards?

1=YES

2=NO [AFTER PERSUADER APPLIED - GO TO Q16]

97=DON'T KNOW

98=REFUSED

PERSUADER

[FOR ANY REPONSE OTHER THAN "YES":] The guest survey will be a critical part of industry monitoring. Because off-site expenditures can be substantial and cannot be collected through the operator survey, guests must be contacted. This methodology will ensure that your guests fully understand the purpose of the project and secure their consent to contact them directly. With that in mind…[REPEAT Q14, QUESTION ONLY.]

Section 3: Address Confirmation

15. I would now like to confirm that your company's contact information is up to date:
[CONFIRM AND UPDATE:]

a) Contact Person
b) Company
c) Alternate Contact
d) Address 1
e) Address 2
f) City
g) Postal Code
h) Primary Phone Number
i) Phone Number 2
j) Phone Number 3
k) Primary Fax

l) Fax 2
m) Email Address
n) Web Address

Section 4: Operator Identification

16. To accurately measure the full economic impact of your sector, it is very important that we talk to every operator possible working in the BC nature-based tourism industry. We are asking all operators that we contact to tell us if there are other nature-based tourism operators in their sector or in their region that we should contact. Any operators you refer will only be contacted for the purposes of this study. Do you know other nature-based tourism operators who we should contact?

1=YES

2=NO [GO TO SURVEY END]

97=DON'T KNOW [GO TO SURVEY END]

98=REFUSED [GO TO SURVEY END]

17. [REPEAT UNTIL NO MORE REFERALS ARE MADE] Are there any other nature-based tourism companies we should contact?

a.) Could you please tell me the name of the Company?	*b.) And do you have a contact name?*	*c.) What is their phone number?*

[FOR REFERAL AND LIST DEDUPING PURPOSES ONLY:] Are there any other nature-based businesses at this phone number?

1=YES, please specify:______________________

2=NO

***<u>Survey End:</u>* Thank you for participating in our survey. Your responses will be an important start in implementing a nature-based tourism monitoring program, and I appreciate your taking the time to talk to me.**

Appendix D-Mailback Survey

Commercial Nature-Based Tourism Survey

Helping to Build Your Tourism Business in BC

Wilderness Tourism Association

TOURISM BRITISH COLUMBIA CANADA

Please return your completed questionnaire
in the enclosed envelope to:
Tourism British Columbia
300-1803 Douglas St.
Box 9830 Stn. Prov. Govt.
Victoria, British Columbia, V8W 9W5

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.**

Nature-based activities *are any activities that depend directly and focus on the natural environment. They include diverse activities like kayaking, snowmobiling, hiking, heli-skiing, para-gliding, yachting and fishing (for more examples, see the list included in Question 29).*

Q1. In what year did your business begin offering nature-based activities or marketing to clients engaging in nature-based activities? *Please fill in the appropriate year.*

________________ YEAR

Q2. Tourists are travellers who are outside of their usual environment on an overnight trip that lasts at least one night.

A) Thinking only of your clients who are tourists under the above definition, what percentage of your 2001 tourist clients were from each of the following geographic markets? *Fill in the appropriate percentage in the first column. Please mark zero percent (0%) if there were no clients from a particular market.*

B) In the second column, mark up to 5 markets where you expect the strongest growth in the next 5 years.

	Mark Here
______% BRITISH COLUMBIA	☐
______% ALBERTA	☐
______% ONTARIO	☐
______% QUEBEC	☐
______% OTHER CANADA	☐
______% NORTH WESTERN US*	☐
______% CALIFORNIA	☐
______% OTHER US	☐
______% UNITED KINGDOM	☐
______% GERMANY	☐
______% OTHER EUROPE	☐
______% ASIA	☐
______% OTHER ________________	☐

Mark Up to 5 Growth Markets

= 100% TOTAL TOURIST CLIENTS

* North Western US: Washington, Oregon, Idaho, Montana, Alaska

Q3. Approximately what percentage of your 2001 nature-based tourist clients were male and what percentage were female? Please fill in the appropriate percentages.

_____ % MALE TOURIST CLIENTS

_____ % FEMALE TOURIST CLIENTS

= 100% TOTAL TOURIST CLIENTS

Q4. Thinking about your tourist clients in 2001, approximately what percentage of these clients fell into the following age categories? Please mark zero percent (0%) if there were no clients in an age category.

_____ % 19 YEARS OR YOUNGER

_____ % 20 TO 24 YEARS

_____ % 25 TO 34 YEARS

_____ % 35 TO 44 YEARS

_____ % 45 TO 54 YEARS

_____ % 55 TO 64 YEARS

_____ % 65 YEARS AND OVER

= 100% TOTAL TOURIST CLIENTS

Q5. Approximately what percentage of your 2001 tourist clients were repeat guests? Repeat guests are those that have been to your establishment on a least one prior occasion to their visit in 2001. Please fill in the appropriate percentage.

_____ % REPEAT GUESTS

Q6. Approximately what percentage of your 2001 tourist clients fell into the following traveler groups? *Mark zero percent (0%) if there were no tourist clients in a particular traveler group. Please fill in the appropriate percentages.*

_____ % INDIVIDUAL

_____ % COUPLES

_____ % FAMILIES

_____ % FRIENDS

_____ % TOUR GROUP

_____ % BUSINESS AND INCENTIVE

_____ % OTHER ______________________

= 100% TOTAL TOURIST CLIENTS

Q7. In 2001, did your company own, or rent/lease from a third party, accommodation facilities or partner with another operator to provide accommodation as part of a package which was available to your guests? *Please mark the most appropriate response.*

	Mark Here	
WE OWNED ACCOMMODATIONS	☐	*Please proceed to **question 8***
WE RENTED/LEASED ACCOMMODATIONS	☐	
WE PARTNERED WITH ANOTHER OPERATOR TO PROVIDE ACCOMMODATIONS	☐	*Please proceed to **question 11***
ACCOMMODATIONS ARE NOT PROVIDED BY OUR COMPANY	☐	

Q8. Below is a list of accommodation facilities that may be available to your clients.

A) Please indicate the types of accommodation facilities your company owned or rented/leased in 2001 in the first column and the maximum number of rooms or sites available per night for each type in 2001. Please mark the types of accommodation your company provided and for each of those accommodation types that you marked, fill in the maximum number of rooms or sites available per night.

B) Fill in the total room capacity. The total room capacity is the sum of the maximum capacity for all accommodation facility types.

	Mark Here		*Max. Rooms or Sites per Night*
BED AND BREAKFAST	☐	**Fill in the number of rooms or sites for each accommodation type**	______ ROOMS OR SITES
BOATS	☐		______ ROOMS OR SITES
CABINS AND COTTAGES	☐		______ ROOMS OR SITES
HOTELS AND MOTELS	☐		______ ROOMS OR SITES
LODGES AND INNS	☐		______ ROOMS OR SITES
TENTS	☐		______ ROOMS OR SITES
TRAILERS	☐		______ ROOMS OR SITES
OTHER:____________________	☐		______ ROOMS OR SITES
TOTAL ROOMS OR SITES PER NIGHT		=	______ ROOMS OR SITES

Q9. For **each month in 2001**, please indicate your occupancy rate (the number of units occupied as a percentage of the total units available each month). *If your accommodation was not open or not available during a particular month, please mark the "NOT OPEN" box for that month.*

_______% JANUARY	**OR**	☐ NOT OPEN
_______% FEBRUARY	**OR**	☐ NOT OPEN
_______% MARCH	**OR**	☐ NOT OPEN
_______% APRIL	**OR**	☐ NOT OPEN
_______% MAY	**OR**	☐ NOT OPEN
_______% JUNE	**OR**	☐ NOT OPEN
_______% JULY	**OR**	☐ NOT OPEN
_______% AUGUST	**OR**	☐ NOT OPEN
_______% SEPTEMBER	**OR**	☐ NOT OPEN
_______% OCTOBER	**OR**	☐ NOT OPEN
_______% NOVEMBER	**OR**	☐ NOT OPEN
_______% DECEMBER	**OR**	☐ NOT OPEN

Q10. Thinking of your **tourist clients** who overnight with you, how nights on average do they stay? *Please fill in the appropriate number of nights or mark NOT APPLICABLE.*

____________NIGHTS **OR** ☐ NOT APPLICABLE

Q11. Thinking of your tourist clients who stay with you for less than one day, how many hours on average do they stay? *Please fill in the appropriate number of hours or mark NOT APPLICABLE.*

____________HOURS **OR** ☐ NOT APPLICABLE

Q12. Below is a list of services that may be available to your guests. These services may either be provided by your company or available in the immediate area.

A) Which services were available to guests in 2001? *Please mark all the services that were available to your guests in the first column.*

B) For each of the services available to your guests, please indicate whether the services were provided by your company. *Please mark YES or NO for each service you indicated was available. If the service is not available in your immediate area then leave the second column blank. Marking NO means that the service is available in your area but it is not offered by your company.*

	Service Available?	Offered by your company? YES	NO
RESTAURANT	☐	☐	☐
GIFTSHOPS OR MERCHANDISE	☐	☐	☐
CONVENIENCE FACILITIES *(e.g. laundromat, convenience store)*	☐	☐	☐
EQUIPMENT RENTALS/SALES	☐	☐	☐
NATURE-BASED TOUR GUIDES AND/OR TOUR LEADERS	☐	☐	☐
UTILITIES *(e.g. water, electricity, showers, washrooms)*	☐	☐	☐
LUXURY AMENITIES *(e.g. whirlpool, swimming pool, hot tub, sauna)*	☐	☐	☐
TRANSPORTATION SERVICES TO AND FROM YOUR BUSINESS LOCATION *(bus, ferry, taxi, etc.)*	☐	☐	☐
VALUE ADDED OR JOINT PROGRAMMING SERVICES *(e.g. performing arts, aboriginal culture, regional cuisine)*	☐	☐	☐
OTHER: ______________________________	☐	☐	☐

Did your company provide this service?

Q13. Has your business increased, decreased or stayed about the same in the past five years (since 1997 or since opening, if operating less than 5 years)? *Mark the best response and skip to the appropriate question.*

	Mark Here	
INCREASED	☐	→ Please proceed to **question 14**
STAYED ABOUT THE SAME	☐	→ Please proceed to **question 16**
DECREASED	☐	
DON'T KNOW/NO OPINION	☐	

Q14. How has your business grown in the last five years (since 1997 or since opening, if operating less than 5 years)? *Mark all items that apply.*

	Mark Here
INCREASED VOLUME DURING PEAK SEASON	☐
INCREASED VOLUME DURING NON-PEAK SEASON	☐
INCREASED REVENUES	☐
OFFERED NEW ACTIVITIES	☐
HIRED MORE STAFF	☐
OPENED NEW LOCATIONS	☐
OPERATED TOURS IN NEW LOCATIONS	☐
OTHER: ______________________________	☐
NONE	☐

Q15. By what percentage has your **revenue** increased in the last five years (or since opening, if operating less than 5 years)? *Fill in the appropriate percentage.*

_________ % GROWTH OR ☐ MY REVENUE DID NOT GROW

Q16. In the next five years, do you expect your business to increase, decrease or stay about the same? *Please mark the most appropriate item and skip to the appropriate question.*

	Mark Here	
INCREASE	☐	→ *Please proceed to question 17*
STAY ABOUT THE SAME	☐	→ *Please proceed to question 19*
DECREASE	☐	
DON'T KNOW/NO OPINION	☐	

Q17. In what ways do you expect your business to grow in the next five years? *Mark all items that apply.*

	Mark Here
INCREASE VOLUME DURING PEAK SEASON	☐
INCREASE VOLUME DURING NON-PEAK SEASON	☐
INCREASE REVENUES	☐
OFFER NEW ACTIVITIES	☐
HIRE MORE STAFF	☐
OPEN NEW LOCATIONS	☐
OPERATE TOURS IN NEW LOCATIONS	☐
OTHER: ______________________________	☐
OTHER: ______________________________	☐

Q18. By what percentage do you expect your **revenue** to grow in the next five years (between 2002 and 2007)? *Fill in the appropriate percentage. Please assume constant dollars, i.e. do not adjust for inflation.*

_________ % EXPECTED GROWTH **OR** ☐ MY REVENUE WILL NOT GROW

SECTION 2: **The second section of this survey asks you about your advertising and marketing activities. Please provide the most accurate responses possible.**

Q19. What percentage of your total bookings came from the following sources in 2001? *Fill in the appropriate percentage and if more than 0% in marketing methods go to Q20.*

_____ % REPEAT GUESTS

_____ % WORD OF MOUTH

_____ % DRIVE BY/WALK IN

_____ % MARKETING

_____ % OTHER ______________________

_____ % OTHER ______________________

= 100% TOTAL TOURIST CLIENTS

Q20. A) What marketing methods did you use in 2001? *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 2001. *For each marketing method selected, fill in the appropriate percentages in column B, the total should equal 100%.*
C) Of all bookings attributed to marketing (in Q19) and for each method selected in 20A, please indicate the approximate percentage of your bookings attributed to this method in 2001. *For each marketing method selected, fill in the appropriate percentages in column C, the total should equal 100%. If you Don't Know please fill in DK for each marketing method selected.*

MARKETING METHODS	**A) 2001 Methods**	**B) % of total marketing budget**	**C) % of bookings attributed to each marketing method**
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 SITES	☐	_________ %	_________ %
PROVINCIAL/TERRITORIAL TRAVEL GUIDES	☐	_________ %	_________ %
COMMERCIAL TRAVEL GUIDE	☐	_________ %	_________ %
RADIO OR TELEVISION ADS	☐	_________ %	_________ %
MAGAZINE ADS	☐	_________ %	_________ %
PUBLIC RELATIONS (E.G. FEATURE ARTICLES)	☐	_________ %	_________ %
MAGAZINE ADS	☐	_________ %	_________ %
OTHER: ______________________	☐	_________ %	_________ %
NONE	☐	_________ %	_________ %
TOTAL		**=100%**	**=100%**

Q21. Did you participate in any co-operative marketing programs in 2001? Co-operative marketing programs include marketing activities where a company partners with one or more associations, companies or regional organisations. *Mark YES or NO and skip to the most appropriate question.*

	Mark Here	
YES	☐	→ *Please proceed to* ***question 22***
NO	☐	→ *Please proceed to* ***question 23***

Q22. What types of companies or associations did you partner with in co-operative marketing activities in 2001? *Mark all items that apply.*

	Mark Here
CANADIAN ACCOMMODATION COMPANIES	☐
INTERNATIONAL ACCOMMODATION COMPANIES	☐
CANADIAN PASSENGER TRANSPORTATION COMPANIES	☐
INTERNATIONAL PASSENGER TRANSPORTATION COMPANIES	☐
OTHER ADVENTURE COMPANIES	☐
INDUSTRY ASSOCIATIONS	☐
MUNICIPAL OR REGIONAL ORGANISATIONS	☐
NATIONAL OR PROVINCIAL ORGANISATIONS	☐
SPECIAL EVENTS *(e.g. trade shows, festivals)*	☐
TRADE ORGANISATIONS (TRAVEL AGENTS OR WHOLESALE OPERATORS)	☐
OTHER: ____________________	☐

SECTION 3: The third section asks questions about your revenues and expenditures. Please provide the most accurate responses possible.

Q23. What were your total revenues in 2001? Please include all guests – tourists and non-tourists (i.e. local residents or day-trip clients). *Fill in the appropriate amount.*

$ ____________ TOTAL REVENUES (Canadian dollars)

Q24. Of the total 2001 revenues reported in Q23 above, what percentage is generated by each of the following categories? *Fill in the appropriate percentage. Please mark zero percent (0%) if there was no revenue in a particular category.*

_____ % GUIDED ACTIVITIES

_____ % SELF-GUIDED (EQUIPMENT RENTALS)

_____ % ACCOMMODATION

_____ % MEALS (FOOD AND BEVERAGE)

_____ % MERCHANDISE

_____ % ALL INCLUSIVE

_____ % OTHER:______________________

= 100% TOTAL REVENUES

Q25. What percentage of your total 2001 revenue was generated by your tourist clients? (Tourists are travelers who are outside of their usual environment on an overnight trip that lasts at least one night) *Fill in the appropriate percentage.*

_________ % REVENUES GENERATED BY TOURIST CLIENTS.

Q26. What were your total expenses (including interest and amortization) in 2001? *Fill in the appropriate percentage.*

$ __________ TOTAL EXPENSES (Canadian dollars)

Q27. Of the total 2001 operating expenses reported in Q26, what percentages are allocated to each of the following categories? *Fill in the appropriate percentage. Please mark zero percent (0%) if there was no revenue in a particular category.*

_____ % LABOUR EXPENSES

_____ % ADVERTISING AND PROMOTIONAL ACTIVITIES

_____ % LIABILITY INSURANCE

_____ % NEW FACILITIES AND/OR EQUIPMENT (CAPITAL COSTS)

_____ % MAINTENANCE OF EXISTING FACILITIES AND/OR EQUIPMENT

_____ % MORTGAGE AND RENT

_____ % TRANSPORTATION AND FUEL (GUEST RELATED AND FREIGHT)

_____ % FOOD AND BEVERAGE

_____ % INTEREST

_____ % AMORTIZATION

_____ % ALL OTHER EXPENSES

= 100% TOTAL EXPENSES

Q28. Please estimate the market value of all physical and financial assets owned by your company at the end of 2001. *If you are reporting on a fiscal year basis, please report figure at fiscal year end. Fill in the appropriate amount.*

$ ___________ TOTAL ASSETS (Canadian dollars)

Q29. Please complete the table below, focusing only on your **tourist clients** in 2001.

A) Please indicate **all types of nature-based activities** that these 2001 tourist clients did with your company (or while staying with your company). *Mark all items that apply.*

B) Of the types of nature-based activities selected in column A, please indicate the most commonly sold nature-based activity. *Mark your most commonly sold activity.*

C) Please record the approximate **percentage of your tourist revenue** generated by the activities selected in column A. *Fill in the appropriate percentage.*

ACTIVITIES OFFERED	**A) All activities**	**B) Most common** *(select one)*	**C) % of nature-based tourist revenue**
BIRD WATCHING	☐	☐	%
CANOEING	☐	☐	%
CAT SKIING OR CAT SNOWBOARDING	☐	☐	%
CAVING OR SPELUNKING	☐	☐	%
BACK COUNTRY OR TOUR SKIING	☐	☐	%
CROSS COUNTRY OR SKATE SKIING	☐	☐	%
CULTURAL OR HISTORIC TOURISM (NATURE-BASED)	☐	☐	%
CYCLING OR MOUNTAIN BIKING	☐	☐	%
DOG SLEDDING	☐	☐	%
EDUCATION (NATURE / OUTDOOR)	☐	☐	%
FRESH WATER FISHING	☐	☐	%
GUEST RANCH	☐	☐	%
HANG GLIDING OR PARA-SAILING	☐	☐	%
HELI-SKIING OR HELI-SNOWBOARDING	☐	☐	%
HIKING OR BACKPACKING	☐	☐	%
HORSEBACK RIDING OR TRAIL RIDING	☐	☐	%
HUNTING	☐	☐	%
LLAMA TREKKING	☐	☐	%
POWER CRUISING	☐	☐	%
RAFTING	☐	☐	%
RIDING ALL TERRAIN VEHICLES (ATV)	☐	☐	%
ROCK CLIMBING, MOUNTAINEERING OR ICE CLIMBING	☐	☐	%
MULTI-DAY YACHT CRUISING	☐	☐	%
RIVER TOURS	☐	☐	%
DAY SAILING/WINDSURFING	☐	☐	%
SALT WATER FISHING	☐	☐	%
SCUBA DIVING OR SNORKELING	☐	☐	%
SEA KAYAKING	☐	☐	%
SNOWMOBILING	☐	☐	%
SURFING	☐	☐	%
TRANSPORTATION SERVICES FOR ANY NATURE-BASED ACTIVITIES (AIR, RAIL, BUS, ETC.)	☐	☐	%
WHALE WATCHING	☐	☐	%
WHITE WATER KAYAKING	☐	☐	%
WILDLIFE/NATURE OBSERVATION INCLUDING PHOTOGRAPHY	☐	☐	%
OTHER: ________	☐	☐	%
OTHER: ________	☐	☐	%
Total %			**= 100%**

SECTION 4: **This section asks questions about your operating environment. Please provide the most accurate responses possible.**

Q30. What is the **primary reason** for your business location? *Mark the most appropriate answer.*

	Mark Here
PROXIMITY TO APPROPRIATE NATURAL ENVIRONMENT	☐
ACCESSIBILITY TO CLIENT MARKET	☐
PERSONAL ROOTS IN LOCATION	☐
OTHER: ______________________________	☐

Q31. Thinking about the long term growth of your nature-based tourism business.

A) Which constraints will impact your long term growth? Please mark all constraints to the growth of your business in column A.

B) Of all constraints you selected in column A, which **five constraints** will have the most serious impacts on the long-term growth of your business? *Please rank constraints from 1 to 5, where 1 = most serious.*

CONSTRAINTS TO BUSINESS PERFORMANCE	**A) All constraints** *(mark all that apply)*	**B) Most serious constraints** *(rank 1 to 5)*
TRANSPORTATION		
LIMITED OR POOR AIR ACCESS FOR VISITORS	☐	______
LIMITED OR POOR GROUND ACCESS FOR VISITORS	☐	______
TRAVEL SAFETY CONCERNS OR HASSLES	☐	______
BUSINESS DEVELOPMENT		
HIGH MARKETING COSTS	☐	______
LACK OF MARKET RESEARCH	☐	______
DIFFICULTY IN ACCESSING CAPITAL DOLLARS FOR EXPANSION	☐	______
DIFFICULTY IN FINDING PARTNERS	☐	______
DIFFICULT TO SECURE INSURANCE	☐	______
PRICE COMPETITION	☐	______
LACK OF ACCOMMODATION FACILITIES	☐	______
POOR QUALITY ACCOMMODATION SERVICES	☐	______
LACK OF TECHNOLOGY SERVICES	☐	______
GOVERNMENT REGULATION		
TOO MUCH INDUSTRY REGULATION	☐	______
LACK OF INDUSTRY REGULATION	☐	______
LAND USE ISSUES		
LACK OF LONG-TERM GUARANTEE OF TENURING TO THE LAND BASE	☐	______
COMPETITION FOR NATURAL RESOURCES AMONG MULTIPLE INDUSTRIES	☐	______
LACK OF SECURITY REGARDING LONG TERM INTEGRITY OF VIEWSCAPES	☐	______
LACK OF LONG TERM ACCESS TO THE LAND BASE VIA FORESTRY ROADS AND TRAILS	☐	______
HUMAN RESOURCES		
FINDING STAFF WITH ADEQUATE TRAINING	☐	______
RETAINING STAFF WITH ADEQUATE TRAINING	☐	______
INADEQUATE STAFF PERFORMANCE	☐	______
OTHER		
WEATHER CONSTRAINTS	☐	______
OTHER: ______________________________	☐	______

Q32. Thinking of the constraints you ranked as the most serious in Q30, do you have any suggestions about how to address the issues that will impact your long term growth?

Q33. Is there anything else you would like to tell us about your business or this study? We would appreciate any comments you may have.

Thank you very much for your participation!
Your responses will be a critical part of implementing
the nature-based tourism economic monitoring program.

Please mail your completed questionnaire in the postage-paid return envelope we gave you and drop it in any Canada Post mailbox.

✉ *Tourism British Columbia*
Box 9830, Stn. Prov. Govt.
300-1803 Douglas St.
Victoria, BC V8W 9W5

☏ *If you have any questions, please call:*
Ric Careless, Executive Director, WTA: (604)-886-8755 or
Richard Porges, Manager of Research Services,
Tourism British Columbia: (250)-356-9936