Ministry of Tourism, Trade and Investment

British Columbia Canada

TourismBC

Guest Ranchers Business Survey 2008/2009

January 14, 2011

Research, Planning & Evaluation
3rd Floor, 1803 Douglas Street
Victoria, BC V8T 5C3
Phone: 250-387-1567

Table of Contents

Table of Contents

Table of Contents

Acknowledgements

- This research was made possible with the support of the British Columbia Guest Ranchers Association (BCGRA) executive and members, as well as all of the businesses who willingly and freely supplied information regarding the operations of their guest ranch business.

- Additional thanks are extended to Nicolle Dupont, Director of Marketing for the BCGRA, and Tyler Beckley from Three Bars Ranch for their expertise and ongoing support throughout the entire process, from questionnaire development to follow-up reminder phone calls.

Executive Summary

Executive Summary

The following are some highlights from the report:

- This presentation details the results of a survey of British Columbia guest ranch businesses that was conducted by the Research, Planning and Evaluation Branch of the BC Ministry of Tourism, Trade and Investment on behalf of the British Columbia Guest Ranchers Association (BCGRA) in association with the Experiences BC program.

- Survey responses were received from 19 of British Columbia's 57 guest ranch businesses operating in 2008/2009 (33% response rate). Analysis provided in this report should not be used to represent or reflect the guest ranch sector in British Columbia as a whole.

- The majority of guest ranch businesses are small businesses with between one and five employees and less than 1,000 clients in 2008.

- Four in 10 guest ranch businesses indicated that more than half of their 2008 clients were repeat customers. From our non-tenured strata, 50% indicated that over half of their 2008 clients were repeat customers.

Executive Summary

- Compared with the previous year, 41% of guest ranch businesses indicated that their business experienced an increase in volume, 35% indicated a decline in volume, and 24% indicated no change.

- All guest ranch businesses offered accommodations, 95% offered trail rides and family vacations, 58% offered hiking and non-gourmet meals, and 53% offered the working cattle ranch experience.

- Among all respondents, the top revenue generating services were accommodations (94%), trail rides (67%), and family vacations (39%).

- Almost half of guest ranch businesses (48%) described their accommodations as moderate/luxurious or luxurious. Non-member businesses were the most likely to describe their accommodations as rustic/moderate or rustic, with over three-fifths (63%) choosing this description.

- The majority (79%) of guest ranch businesses provide breakfast, lunch and dinner to their guests.

Executive Summary

- Over half of all operators (56%) reported gross annual revenue between $0 and $100,000, with well over half of operators indicating the majority of their revenue was used to cover their business operating costs.

- Permits, including Crown land tenures, land use agreements, and provincial and national park permits, represented a considerable cost with over one-third of businesses having spent more than $2,001 on permits. Almost half of businesses (47%) spent between one and seven days on issues related to tenure, land use and permits.

- Operators reported that both females (52%) and males (48%) participated in guest-ranch based activities. Females were less likely to participate in guest-ranch based activities at ranches without tenure (females 46%, males 54%).

- Almost two-thirds (64%) of clients were between the ages of 25 and 54, and almost one-quarter (23%) of clients were under the age of 25. The majority of guest ranchers stated that the age distribution of clients has not changed in the last 10 years, or since they opened.

Executive Summary

- Families made up the largest group of clients (40%), followed by couples (29%) and friends (18%). The majority of businesses indicated that their clients were travelling in mixed gender groups (68%), followed by female only groups (21%) and male only groups (11%).

- British Columbians made up almost half of guest ranch businesses client base (49%), followed by Europeans (32%), and other Canadians (12%). Non-member and no-tenure businesses reported the largest percentage of British Columbian clients (62% and 61% respectively).

- The highest proportion of clients (41%) stayed two to three nights in the area, and the majority booked anywhere from one month to more than a year in advance of their visit to a B.C. guest ranch. Almost all (95%) of businesses received bookings via telephone, followed by bookings via their website (89%). Tenured and member businesses were more likely than no-tenure and non-member businesses to have received bookings via a travel agent.

Executive Summary

- All guest ranch businesses used their own website as a means of marketing their business, and websites (other or own) were most often listed as one of the top three marketing methods used by businesses.

- The largest group of businesses (35%) reported spending between $2,501 and $5,000 on marketing and advertising.

- High insurance costs were listed as a top constraint to long-term business growth, as were the number of government regulations, and the difficulty accessing capital dollars for expansion. Responses varied depending on tenure/no-tenure and member/non-member analysis.

- Overall, businesses were most likely to indicate that high marketing and insurance costs should be top priorities for the BC Guest Ranchers Association to address and that development and marketing represented the most promising opportunities for growth.

- Marketing and promotion was also acknowledged to be an important area of focus to help them grow a more profitable business.

Research Objectives

Research Objectives

The BC Guest Ranchers Business Survey was initiated through the Experiences BC program at the Ministry of Tourism, Trade and Investment.

The primary objectives of the study were:

1) To develop a more comprehensive understanding of the guest ranch sector operating in British Columbia.

2) To provide relevant information that would help the guest ranch sector make sound product development and marketing decisions.

3) To gather detailed information on the characteristics of the sector, such as:
   - size of the guest ranch business (based on number of clients per year)
   - types of products and services being offered
   - where the products and services were being offered
   - staff (part-time/full-time/volunteer)
   - demographic profile of clients
   - percentage of clients who were tourists
   - number of clients and/or tourists participating in guest ranch-based activities
   - average business' gross revenues from guest ranch-based activities
   - the percentage of gross revenues attributable to clients participating in guest ranch-based related activities
   - the constraints to and opportunities for growth that business owners experience

4) To further develop business owners' understanding of their business versus the entire guest ranch sector in BC.

Defining the Target Population

Target Population

- During our study period (2008/2009) there were 57 guest ranch businesses in operation. These 57 businesses were our target population.

- Fifteen of the 57 businesses were members of the British Columbia Guest Ranchers Association (BCGRA) in 2008/2009.

Methodology

Methodology

- A database of 63 guest ranch businesses was created and a survey was mailed (via Canada Post) to each of these businesses on June 19th. Surveys were to be completed by June 30th for members of the BCGRA and July 6th for non-members.

- A second mailout was sent on July 16th to 58 non-respondents.

- A final mailout was sent September 18th to 36 non-respondents followed by a reminder follow-up phone call one week later.

- From the original distribution list it was determined that there were 57 guest ranch businesses in total operating in BC in 2008/09. Of these, 19 responded to the survey (33% response rate). This included 11 BCGRA members (73% response rate for members), eight non-members (20% response rate for non-members), 13 with Crown land tenure, and six with no tenure.

- ***Important*** Due to a low overall response rate (33%), analysis provided in this report should not be used to represent or reflect the guest ranch sector in British Columbia as a whole. It is merely the aggregated results of participating guest ranches.

- Businesses were asked to provide data for their 2008 season; two business were not open in 2008 and provided data for 2009 instead.

Methodology

- At the end of the survey, guest ranch businesses were given the opportunity to provide comments concerning the following:

  - Constraints that your business or industry currently has as a result of government regulations
  - Suggestions about how to address current constraints from government regulations
  - Suggestions about how to address the issues that will impact long-term growth in your <u>business</u>
  - Suggestions about how to address the issues that will impact long-term growth in the <u>industry</u>

- Verbatim comments have been included at the end of the presentation.

- Unless otherwise stated, valid responses only have been reported in the analysis.

- The data is not weighted as we did not have any supporting information on the non-responding businesses in order to create weights.

Findings

Sector Characteristics

Staffing: Average number of Staff per Month

Average monthly full-time, part-time, and volunteer staff for tenured, non-tenured, BCGRA member, non-member and all guest ranch business respondents

- Of all responding guest ranch businesses, the majority employed between one and five employees (full-time, part-time and volunteer employees). This would indicate that most guest ranch businesses represent smaller scale operations.

	All			Crown land tenure			No tenure			BCGRA member			Non-member		
Number of employees	Full-Time	Part-Time	Volunteer	Full-Time	Part-Time	Volunteer	Full-Time	Part-Time	Volunteer	Full-Time	Part-Time	Volunteer	Full-Time	Part-Time	Volunteer
1-5	57%	67%	100%	50%	100%	100%	67%	-	100%	40%	67%	100%	100%	-	100%
6-10	29%	-	-	50%	-	-	-	-	-	40%	-	-	-	-	-
More than 10	14%	33%	-	-	-	-	33%	100%	-	20%	33%	-	-	-	-

Note: Only respondents reporting one or more staff in a particular category have been presented. Valid responses for each column are shown. Respondents were asked to provide monthly employment figures for each of full-time, part-time and volunteer staff. Due to small sample sizes, it was necessary to average the total number of staff across all months for each respondent by employment category. Figures presented represent the total percent of all valid responses grouped into 1-5 employees, 6-10 employees and more than 10 employees by employment category (full-time, part-time, volunteer). Due to small sample sizes, volunteer staff have been removed from the analysis that appears below.

Staffing: Average number of Staff per Month: Full-Time

- Among all respondents, the majority employ on average between one to five full-time staff monthly.
  - Among Crown land tenured businesses, 50% employ an average of one to five employees monthly.
  - Among non-tenured businesses, 67% employ an average of one to five employees monthly.
  - Among BCGRA members, 40% employ an average of one to five employees monthly.
  - All (100%) non-members employed an average of one to five employees monthly.

Average Number of Monthly Full-Time Staff					
Number of employees	All	Crown land tenure	No tenure	BCGRA member	Non-member
1-5	57%	50%	67%	40%	100%
6-10	29%	50%	-	40%	-
More than 10	14%	-	33%	20%	-

Note: Only respondents reporting one or more staff in a particular category have been presented.

Staffing: Average number of Staff per Month: Part-Time

- Among all respondents who indicated that they employed part-time staff, the majority indicated an average of one to five part-time staff monthly:

  - All (100%) tenured businesses reporting part-time staff employed an average of one to five part-time employees monthly.

  - Among reporting BCGRA members, 67% employed an average of one to five part-time employees monthly.

Average Number of Monthly Part-Time Staff					
Number of employees	All	Crown land tenure	No tenure	BCGRA member	Non-member
1-5	67%	100%	-	67%	-
6-10	-	-	-	-	-
More than 10	33%	-	100%	33%	-

Note: Only respondents reporting one or more staff in a particular category have been presented. Small sample sizes, should be interpreted with caution.

Number of Clients

Approximately how many clients (total clients), participating in guest ranch-based activities, did your business serve in 2008?

- Over half (56%) of all respondents indicated a total client volume of less than 500 guests during the year. Over one-fifth indicated a total client volume between 500 and 1999 guests or greater than 2,000 guests (23% and 22% respectively).
- Among Crown land tenured respondents, almost three fifths (58%) had up to 499 clients who participated in guest ranch-based activities in 2008. Compared with 50% of non-tenured respondents.
- Among BCGRA members, 60% had up to 499 clients who participated in guest ranch-based activities in 2008 compared with 51% of non-member respondents.

Number of Clients					
	All	Crown land tenure	No tenure	BCGRA member	Non-member
Under 100	17%	8%	33%	10%	25%
100-249	28%	33%	17%	40%	13%
250-499	11%	17%	-	10%	13%
500-999	11%	17%	-	10%	13%
1000-1499	6%	-	17%	-	13%
1500-1999	6%	8%	-	10%	-
2000+	22%	17%	33%	20%	25%

Percentage of Repeat Clients

Approximately what percentage of your 2008 clients participating in guest ranch-based activities were repeat clients?

- Overall, 39% of all respondents indicated that over half of their 2008 clients were repeat clients.
- Non-tenured businesses had the highest proportion of repeat clients, with 50% indicating that over half of 2008 clients were repeat clients.
- One third of those from Crown land tenured guest ranches indicated that over half of their 2008 customers were repeat clients.
- Among BCGRA members, 40% indicated that over half of their 2008 clients were repeat clients, while 38% of non-members indicated the same.

Percentage of Tourist Clients

*In 2008, approximately what percentage of your clients who participated in guest ranch based activities were tourists?**

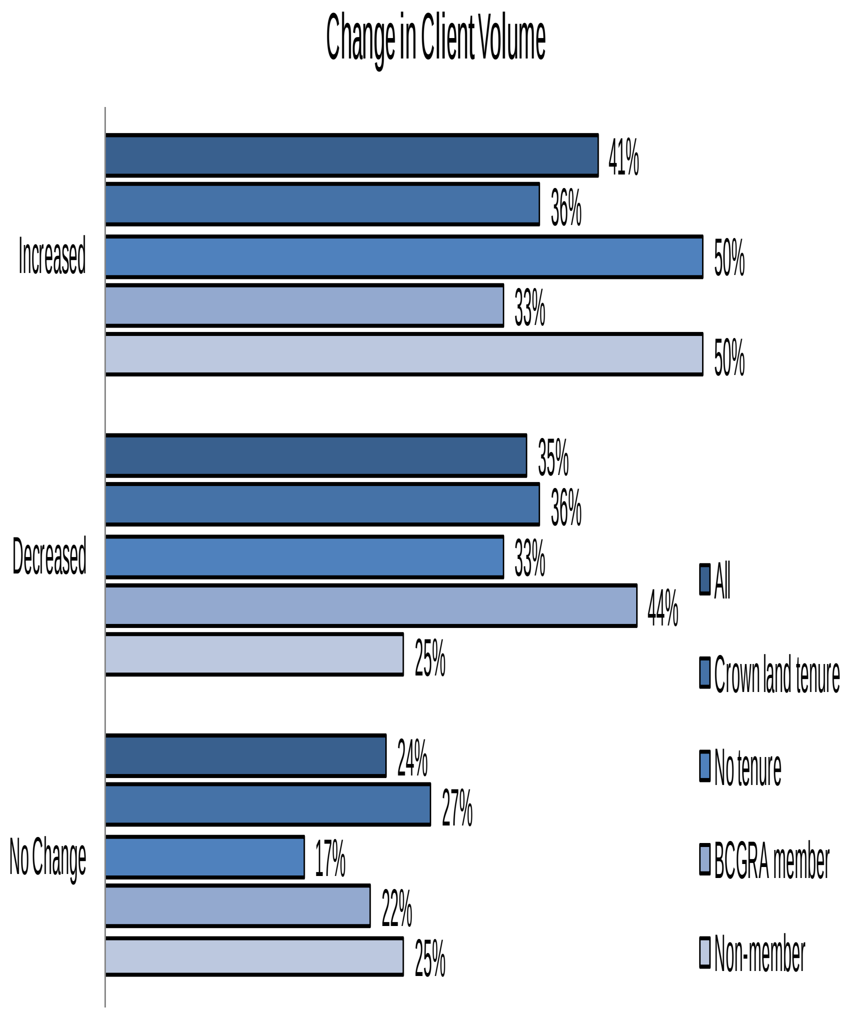
- Overall, a large majority (82%) of all respondents reported that their 2008 clients were predominately tourists (90% or more were tourists from outside of the local area).
- Among those from Crown land tenured businesses, 92% indicated that their clients were predominantly tourists, compared with 67% of non-tenured guest ranch businesses.
- Of those who indicated they were BCGRA members, 82% reported that their clients in 2008 were predominantly tourists, compared with 88% of those who were not members of the BCGRA.

* A tourist was defined as someone who was not a resident of the local community.

2007 Client Volume versus 2008 Client Volume

Compared with 2007, did the volume of your total clients who participated in guest ranch-based activities increase, decrease, or stay the same in 2008?

- Among all respondents, 41% indicated that they had seen an increase in client volume compared with 2007.
- Non-tenured and non-member guest ranchers were most likely to report an increase in client volume between 2007 and 2008 (50% for each).
- BCGRA members were most likely to report a decrease in client volume (44%).
- Crown land tenured guest ranchers were fairly split, with 36% reporting an increase and 36% reporting a decrease.



Types of Services Offered

Respondents were asked to provide a comprehensive list of the services offered by their guest ranch in 2008.

- Among all respondents, the most commonly offered services included accommodations (100%), trail rides (95%), family vacations (95%), and hiking and non-gourmet meals (58% each).

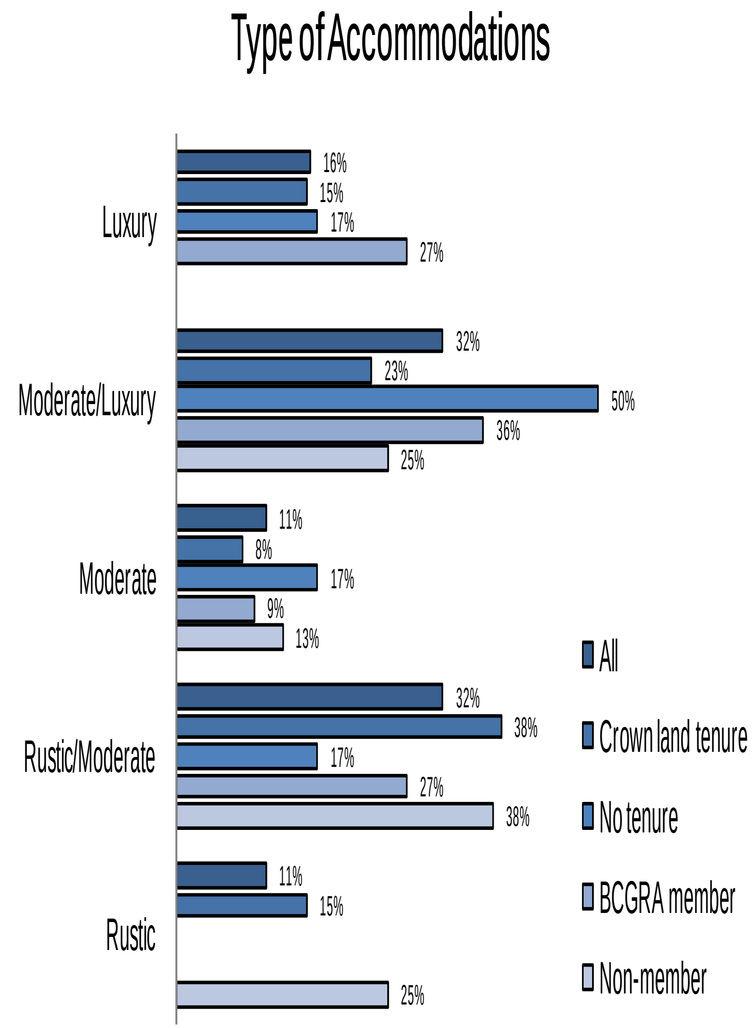
Services Offered in 2008					
	All	Crown land tenure	No tenure	BCGRA member	Non-member
Accommodations	100%	100%	100%	100%	100%
Trail rides	95%	100%	83%	91%	100%
Family vacations	95%	92%	100%	91%	100%
Hiking	58%	62%	50%	91%	13%
Meals (non-gourmet)	58%	62%	50%	64%	50%
Working cattle ranch	53%	46%	67%	45%	63%
Pack trips	26%	31%	17%	36%	13%
Gourmet Cuisine (with chef)	21%	23%	17%	27%	13%
Spa services	16%	15%	17%	27%	-
Interpretive eco-tours	11%	8%	17%	18%	-
First Nations Activities	5%	8%	-	9%	-
Other - All	58%	54%	67%	73%	38%

**Note: Other includes open-ended responses*

Accommodations

What is the best description of the accommodations you provide for your guests?

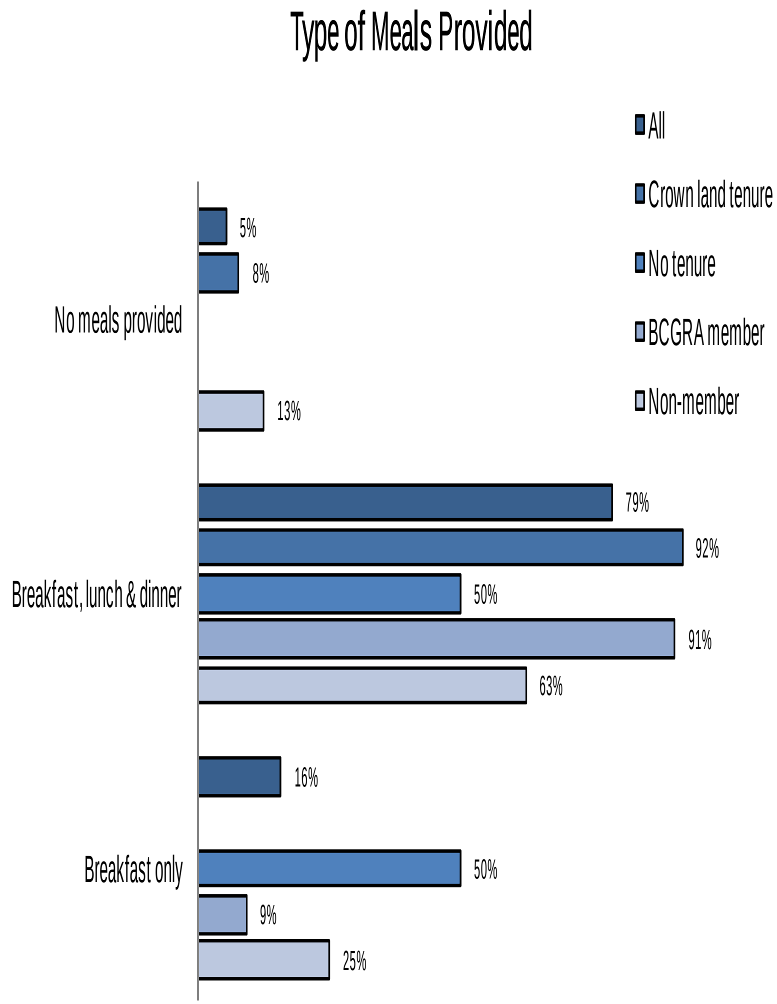
- Approximately two thirds of guest ranchers described their accommodations as either moderate/luxury (32%) or rustic/moderate (32%).
- Respondents from businesses that were Crown land tenured were most likely to describe their accommodations as rustic/moderate (38%), while non-tenured businesses were most likely to describe their accommodation as moderate/luxury (50%).
- BCGRA members were most likely to describe their accommodations as moderate/luxury (36%), while non-members were most likely to describe their accommodations as rustic/moderate (38%).



Meals

Respondents were asked to indicate which meals were provided daily.

- The majority (79%) of guest ranch businesses provide breakfast, lunch, and dinner to guests.
- The percentage reporting all three meals was higher among Crown land tenure and BCGRA members (92% and 91%, respectively).
- Among non-tenure and non-member ranches, the numbers offering all three meals fell to 50% and 63%, respectively.



Top Revenue-Generating Services: All Guest Ranchers

Respondents were asked to rank their top three revenue-generating services.

- Among all respondents, the top revenue-generating services were accommodations (94%), trail rides (67%), and family vacations (39%).

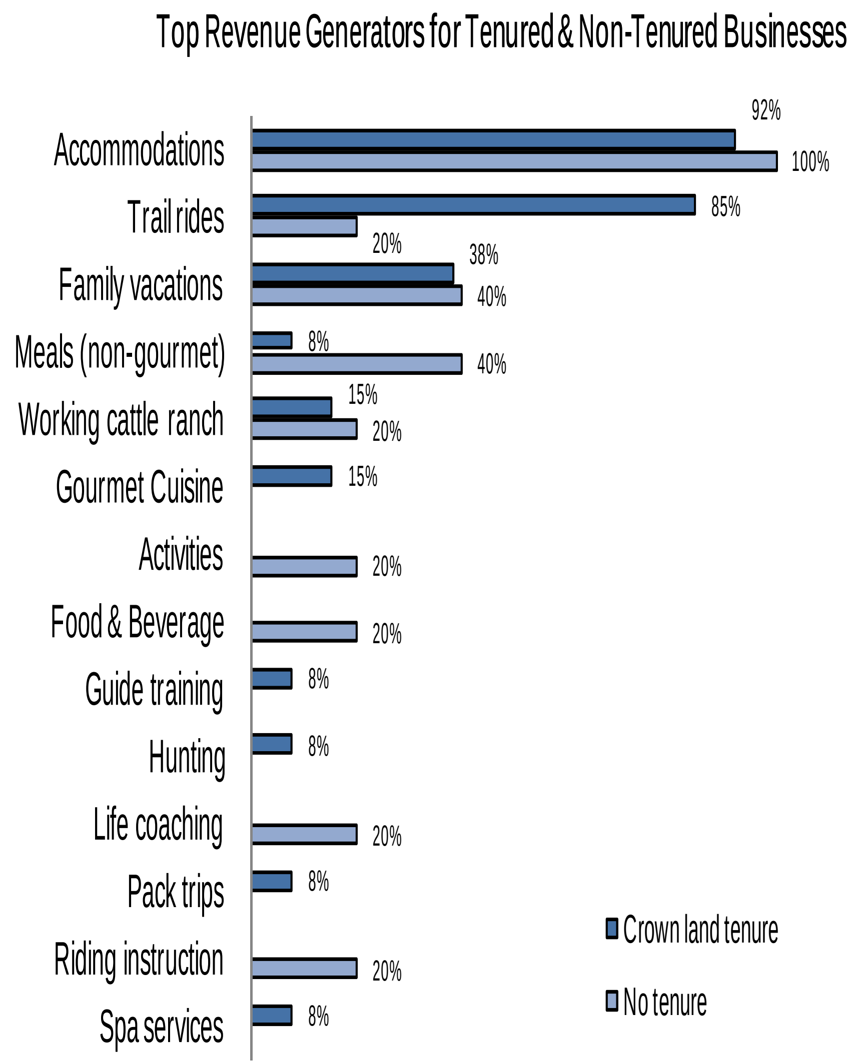
Top Revenue Generators					
	All	Crown land tenure	No tenure	BCGRA member	Non-member
Accommodations	94%	92%	100%	91%	100%
Trail rides	67%	85%	20%	64%	71%
Family vacations	39%	38%	40%	45%	29%
Meals (non-gourmet)	17%	8%	40%	9%	29%
Working cattle ranch	17%	15%	20%	27%	-
Gourmet Cuisine	11%	15%	-	9%	14%
Activities	6%	-	20%	9%	-
Food & Beverage	6%	-	20%	9%	-
Guide training	6%	8%	-	9%	-
Hunting	6%	8%	-	9%	-
Life coaching	6%	-	20%	-	14%
Pack trips	6%	8%	-	9%	-
Riding instruction	6%	-	20%	-	14%
Spa services	6%	8%	-	9%	-

Top Revenue-Generating Services: Tenured vs. Non-Tenured

Top revenue-generating services for tenure and non-tenure businesses

- Accommodations, trail rides, and family vacations were selected most often as top revenue generating services for Crown land tenured guest ranchers, with 92%, 85% and 38% of respondents in this category indicating these services, respectively.

- Among non-tenured respondents, accommodations was also the most frequently selected top revenue generator, with all in this category selecting this service (100%). This was followed by family vacations and non-gourmet meals, which were each selected by 40% of respondents in this category.

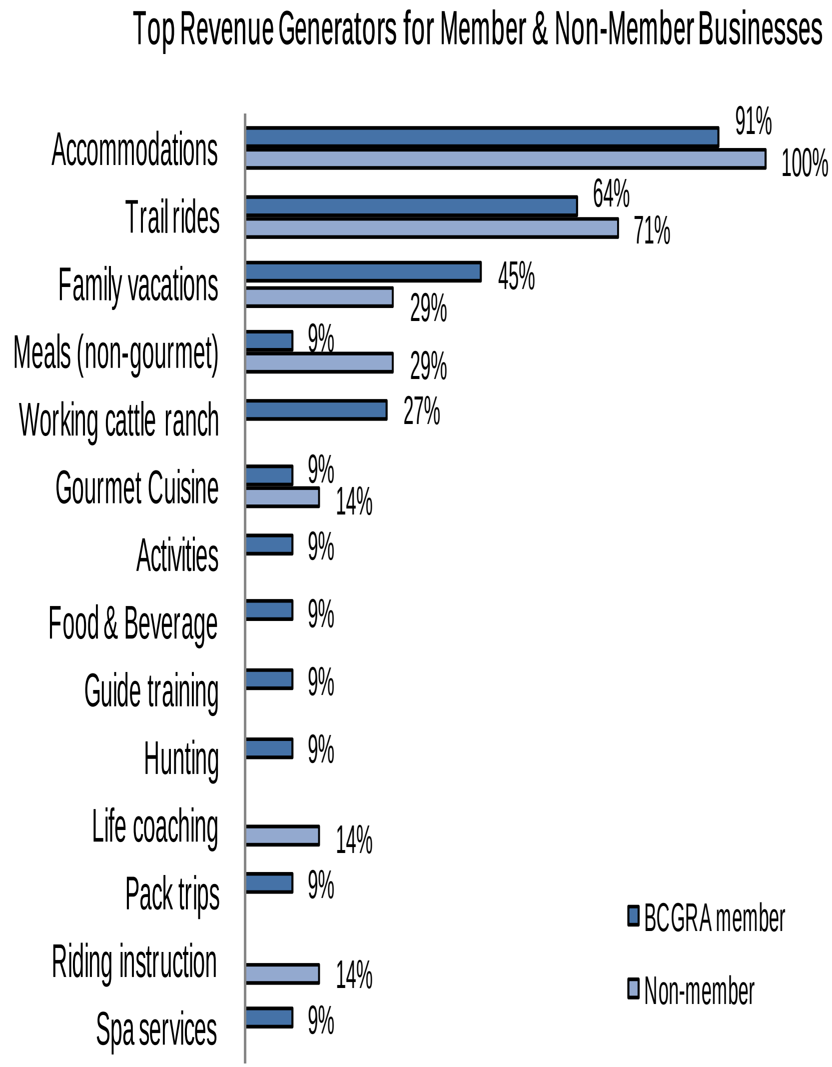


Top Revenue-Generating Services: BCGRA Member vs. Non-Member

Top revenue-generating services for BCGRA member and non-members

- Accommodations, trail rides, and family vacations were selected most often as top revenue-generating services for BCGRA members with 91%, 64% and 45% of respondents in this category indicating these services, respectively.

- Among non-members, 100% selected accommodation as their top revenue generating service, while 71% selected trail rides, and 29% for each of family vacations and non-gourmet meals.



2008/2009 Gross Revenues from Guest Ranch Products and Services

Respondents were asked several questions pertaining to their 2008 gross revenue

- Over half of all respondents (56%) indicated gross revenue between $0 and $100,000, with 28% reporting between $100,001 to $500,000.

- Well over one third (38%) of all respondents indicated that the respondents indicated that the majority (between 75-100%) of all revenue was from clients participating in guest ranch activities.

- Nearly two thirds (60%) of all guest ranchers indicated that the majority (75-100%) of their gross revenue was used to cover their businesses operating costs.

Total Gross Revenue from Products and Services					
	All	Crown land tenure	No tenure	BCGRA member	Non-member
$0 - 100,000	56%	46%	80%	45%	71%
$100,001 - 500,000	28%	38%	-	27%	29%
$500,001 - 1,000,000	11%	15%	-	18%	-
$1,000,000+	6%	-	20%	9%	-

% of Gross Revenue from Clients Participating in Guest Ranch Activities					
	All	Crown land tenure	No tenure	BCGRA member	Non-member
Less than 20%	6%	8%	-	10%	-
20% -49%	25%	15%	67%	10%	50%
50% -74%	31%	31%	33%	40%	17%
75% -100%	38%	46%	-	40%	33%

% of Gross Revenue Attributed to Operating Costs					
	All	Crown land tenure	No tenure	BCGRA member	Non-member
Less than 20%	10%	11%	-	-	25%
20% -49%	10%	11%	-	17%	-
50% -74%	20%	11%	100%	17%	25%
75% -100%	60%	67%	-	67%	50%

Dollars and Time Spent on Permits, Land Tenures, and Liability Insurance

Respondents were asked several questions relating to permits, tenure, and land use.

- Nearly one third (29%) of all guest ranch businesses spent over $2,500 on permits in 2008.
- BCGRA members were most likely to spend more than $2,500 on permits, with 50% indicating this level of spending. Non-members were most likely (43%) to indicate that they spent between $1,001-$1,500 on permits.
- Overall, 47% of all guest ranchers indicated they spent between one and seven days on issues relating to tenure, land use, and permits.
- BCGRA members, however, spent the most time on issues relating to tenure, land use, and permits, with 30% spending more than two weeks.
- Non-tenured guest ranchers spent the least amount of time on issues relating to tenure, land use, and permits with 50% indicating they spent less than one day.

Amount of Money Spent on Permits

	All	Crown land tenure	No tenure	BCGRA member	Non-member
$0 - 500	18%	15%	25%	10%	29%
$501 - 1,000	18%	15%	25%	20%	14%
$1,001 - 1,500	18%	15%	25%	-	43%
$1,501 - 2,000	12%	15%	-	20%	-
$2,001 - 2,500	6%	8%	-	-	14%
More than $2,500	29%	31%	25%	50%	-

Amount of Time Spent on Issues Related to Tenure, Land Use, and Permits

	All	Crown land tenure	No tenure	BCGRA member	Non-member
Less than 1 day	18%	8%	50%	10%	29%
1-7 days	47%	62%	-	50%	43%
8-14 days	12%	8%	25%	10%	14%
15-28 days	18%	15%	25%	20%	14%
More than 28 days	6%	8%	-	10%	-

In 2008, how much did your company spend on liability insurance?

- Nearly three quarters (71%) of all guest ranchers spent between $1,000 and $4,999 on liability insurance during 2008.

- Spending was lowest among non-members with 86% spending between $1,000 and $4,999.

- Spending was highest among BCGRA members, with 30% indicating that they spent $25,000 or more in 2008.*

Cost of Liability Insurance					
	All	Crown land tenure	No tenure	BCGRA member	Non-member
$1,000-$4,999	71%	69%	75%	60%	86%
$5,000-$9,999	6%	8%	-	-	14%
$10,000-$14,999	6%	8%	-	10%	-
$15,000+	18%	15%	25%	30%	-

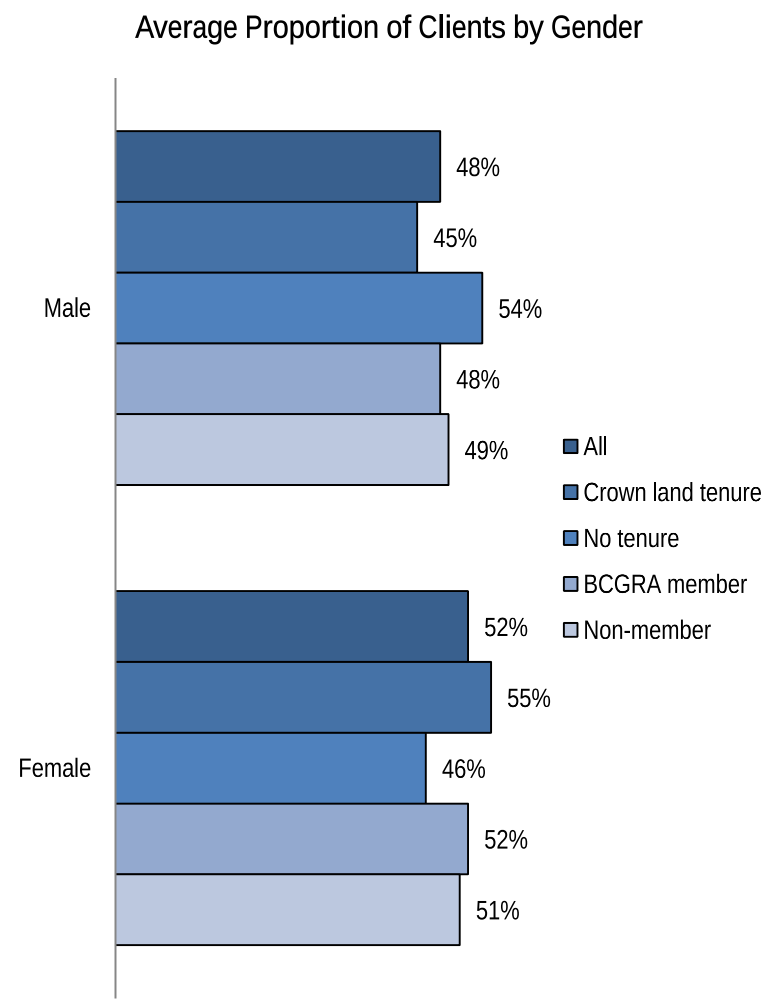
**Note: All respondents in the $15,000 or more category reporting spending more than $25,000 on liability insurance in 2008.*

Client Characteristics

Client Gender

Approximately what percentage of your clients, who participated in guest ranch-based activities, were male and what percentage were female in 2008?

- Overall, respondents indicated that 48% of clients were male and 52% were female.
- Among Crown land tenured guest ranchers, 45% of clients were male, while 55% were female.
- Among non-tenured guest ranchers, 54% were male and 46% were female.
- Among BCGRA members, 47% were male and 53% were female.
- Among non-member guest ranchers, 49% were male and 51% were female.



Client Age

Approximately what percentage of your 2008 clients, participating in guest ranch-based activities, were in each of these age categories?

- Overall, respondents indicated the highest average proportion (26%) of clients were between 35 and 44 years.

- This same age group was reported as the largest proportion of clients for those with Crown land tenures (32%), BCGRA members (28%), and non-members (23%).

Proportion of Clients by Age Group					
	All	Crown land tenure	No tenure	BCGRA member	Non-member
17 years of age or younger	15%	13%	18%	17%	11%
18 - 24 years	8%	5%	13%	5%	13%
25 - 34 years	19%	18%	22%	19%	20%
35 - 44 years	26%	32%	16%	28%	23%
45 - 54 years	19%	19%	20%	19%	21%
55 - 64 years	9%	10%	7%	10%	8%
65 - 74 years	3%	2%	3%	2%	3%
75+ years	1%	1%	2%	1%	2%

- Among non-tenured guest ranchers, the largest client group was between 25 and 34 years. An average of 22% of all clients were in this age group.

- Over three quarters (78%) of all guest ranchers stated that the age distribution of clients has not changed in the last 10 years or since they opened.

Type of Group

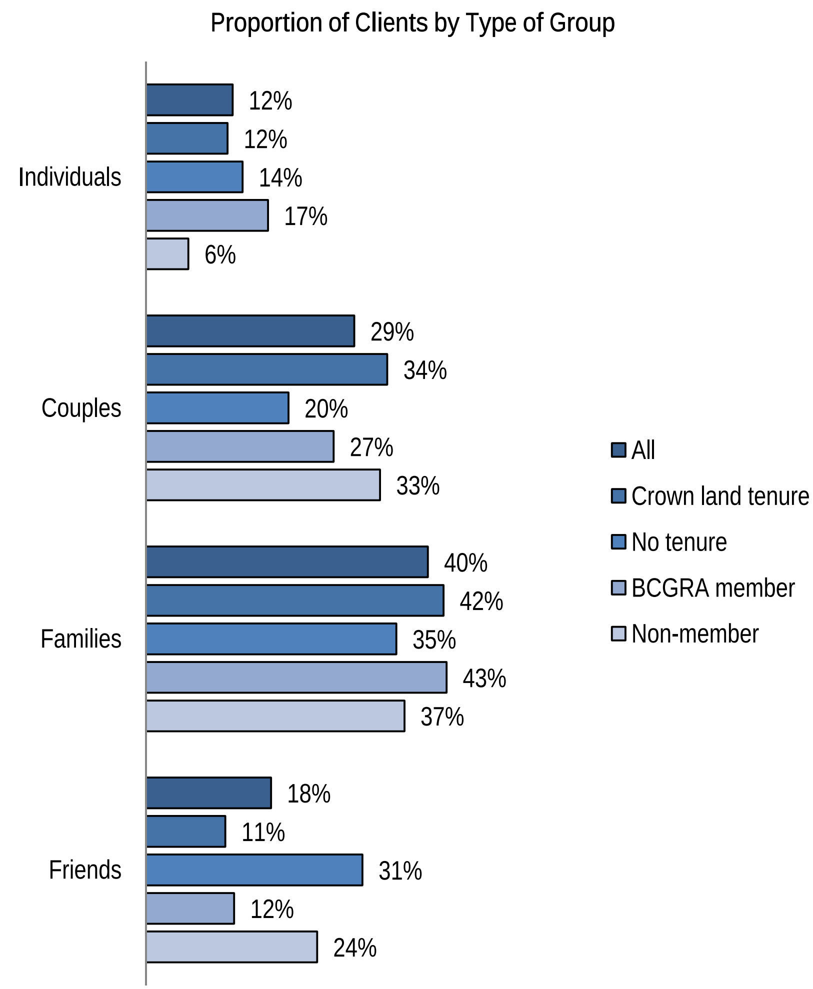
Respondents were asked to identify the type of group that characterizes their clients for 2008.

- On average, all respondents indicated the largest percentage (40%) of their clients were families, followed by couples (29%). The average family size was reported as 3.8 people.

- Among all categories, BCGRA members reported the highest average proportion of clients who came to participate in guest ranch-based activities on their own (individuals 17%).

- Those with no tenure reported the highest average proportion of clients who participated with their friends (31%).

- On average, all respondents indicated that the majority of their clients (68%) were travelling in mixed gender groups, followed by female only groups (21%) and male only groups (11%).



**Note: Responses under "Tour Group" and "Other" categories averaged >1%. Proportions may not add up to 100% due to rounding and averaging across responses.*

Guest Ranch Activities as Main Reason for Travel

What percentage of your 2008 clients regarded participating in guest ranch activities to be the main reason for their travel to your community?

- On average, respondents reported that 65% of their clients had travelled to their community to participate in their guest ranch-based activities.

- Well over half of all respondents (58%), reported that between 75 and 100% of their clients in 2008 were travelling to the community primarily to participate in guest ranch activities.

- Respondents with Crown land tenure were most likely to indicate that 75-100% of their clients were travelling to the community mainly to participate in guest ranch activities (77%), while 33% of those with no tenure indicated that between 0-24% of their clients were travelling to the community primarily to participate in guest ranch activities.

Percentage of Clients Visiting to Participate in Ranch-Based Activities

	All	Crown land tenure	No tenure	BCGRA member	Non-member
0% -24%	16%	8%	33%	18%	13%
25% -49%	11%	-	33%	9%	13%
50% -74%	16%	15%	17%	-	38%
75% -100%	58%	77%	17%	73%	38%

Client Origin

Please indicate what percentage of your 2008 clients came from each geographic market.

- On average, among all guest ranchers the highest proportion of clients originated from British Columbia (49%), followed by Europeans (32%).
- Respondents with Crown land tenured indicated the largest proportion of their clients were from British Columbia (average of 44%) followed by Germany, Austria and Switzerland (24%) and the UK (14%).
- Those with no tenure indicated that an average of 61% of their clients were from British Columbia, while 13% were from Alberta.
- Among BCGRA members, the average proportion from British Columbia was slightly lower at 40%, with an average of 17% from the UK, Germany, Austria and Switzerland.
- Non-members reported the highest average proportion of British Columbian clients (62%), with an average of 17% from Germany, Austria and Switzerland.

Proportion of Clients by Location of Origin

	All	Crown land tenure	No tenure	BCGRA member	Non-member
British Columbia	49%	44%	61%	40%	62%
Alberta	6%	2%	13%	4%	8%
Ontario	4%	5%	3%	8%	1%
Other Canada	2%	1%	3%	2%	2%
Washington	1%	-	2%	1%	-
Alaska	0%	-	1%	-	-
Northeastern U.S.	1%	2%	-	2%	-
Other U.S.	2%	2%	1%	2%	-
United Kingdom	11%	14%	4%	17%	3%
Germany/Austria/Switzerland	17%	22%	8%	17%	17%
Other Europe	4%	3%	6%	3%	6%
Asia	1%	1%	1%	1%	-
Other	2%	3%	-	3%	2%

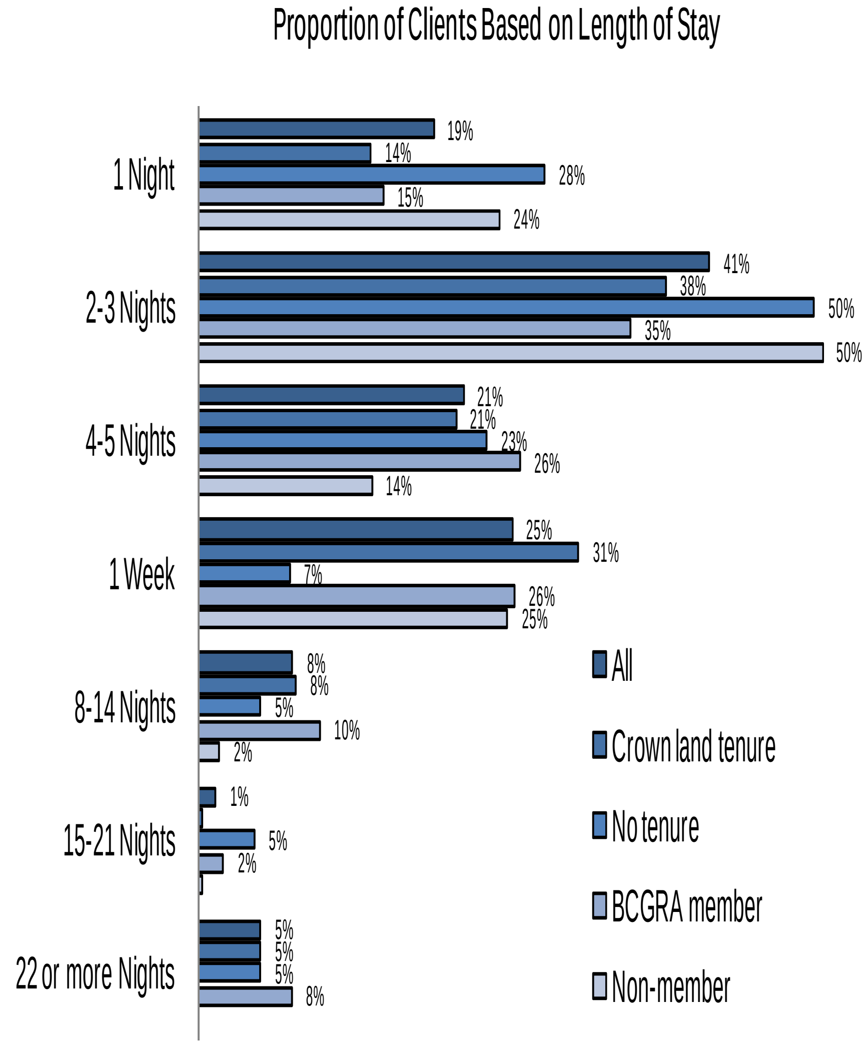
**Note: Proportions may not add up to 100% due to rounding*

**Note: "Other" included Australia, Netherlands, and "all other countries"*

Client Nights

Respondents were asked to indicate the percentage of clients by grouped by duration of stay.

- On average, all respondents indicated that 60% of clients stayed for three or fewer nights with two to three nights comprising the highest average proportion (41%).
- Respondents with Crown land tenure reported that, on average, 31% of clients stayed for one week.
- Among respondents with no tenure, the average proportion for those who stayed two to three nights was 50%.
- BCGRA members reported an average of 35% of clients staying between two to three nights.
- Among non-members, the average proportion of clients staying for two to three nights was 50%.

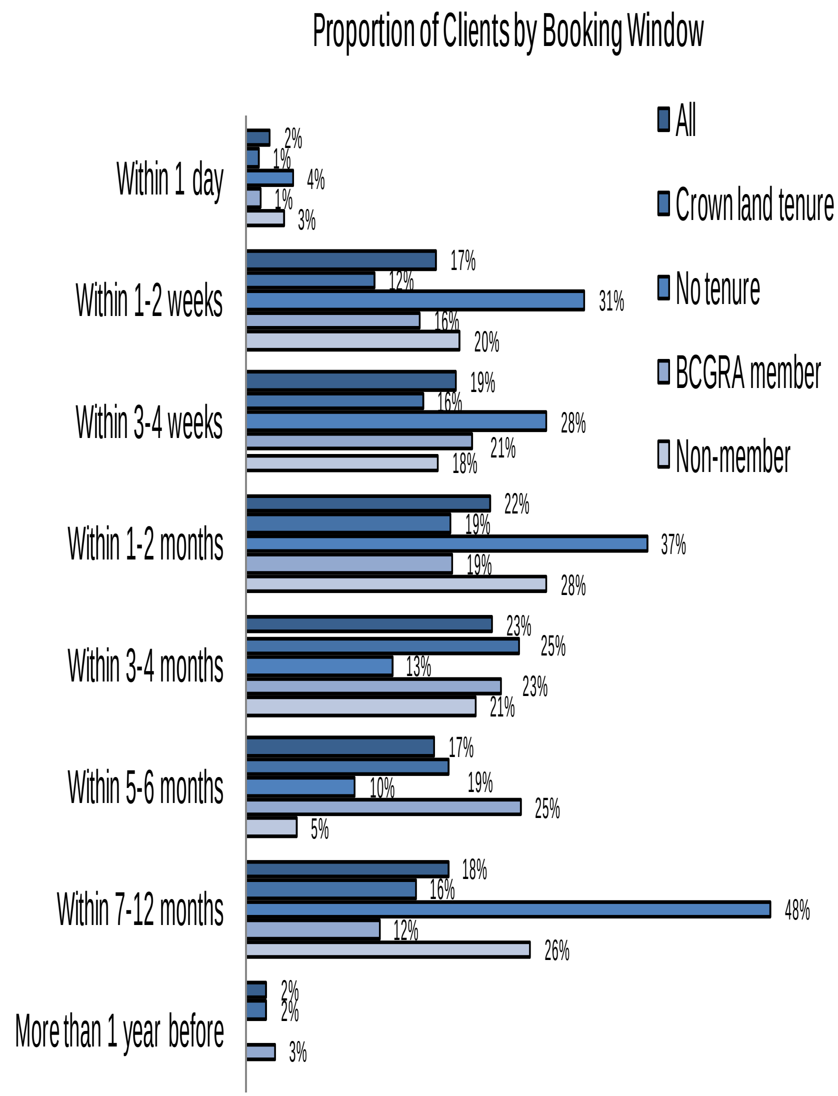


**Note: Proportions may not add up to 100% due to rounding and averaging across responses. Categories with zero responses have not been included in the calculations.*

Booking Times

How far in advance did your 2008 season guests book with you?

- On average, all respondents indicated the highest proportion of clients (23%) booked between three and four months in advance of their stay. On average, respondents indicated that 22% visited one to two months after the booking.
- An average of 25% of clients from crown land tenure respondents visited between three and four months after their booking.
- Among those with no tenure, the average booking window was longer, with an average of 48% of clients booking within seven to 12 months from their visit.
- BCGRA members reported that an average of 25% of clients visited within five to six months after the booking.
- For non-members, an average of 28% of clients visited within one to two months of the booking.



**Note: Proportions may not add up to 100% due to rounding and averaging across responses. Categories with zero responses have not been included in the calculations.*

Booking Methods

What method(s) did your 2008 clients use to book with you?

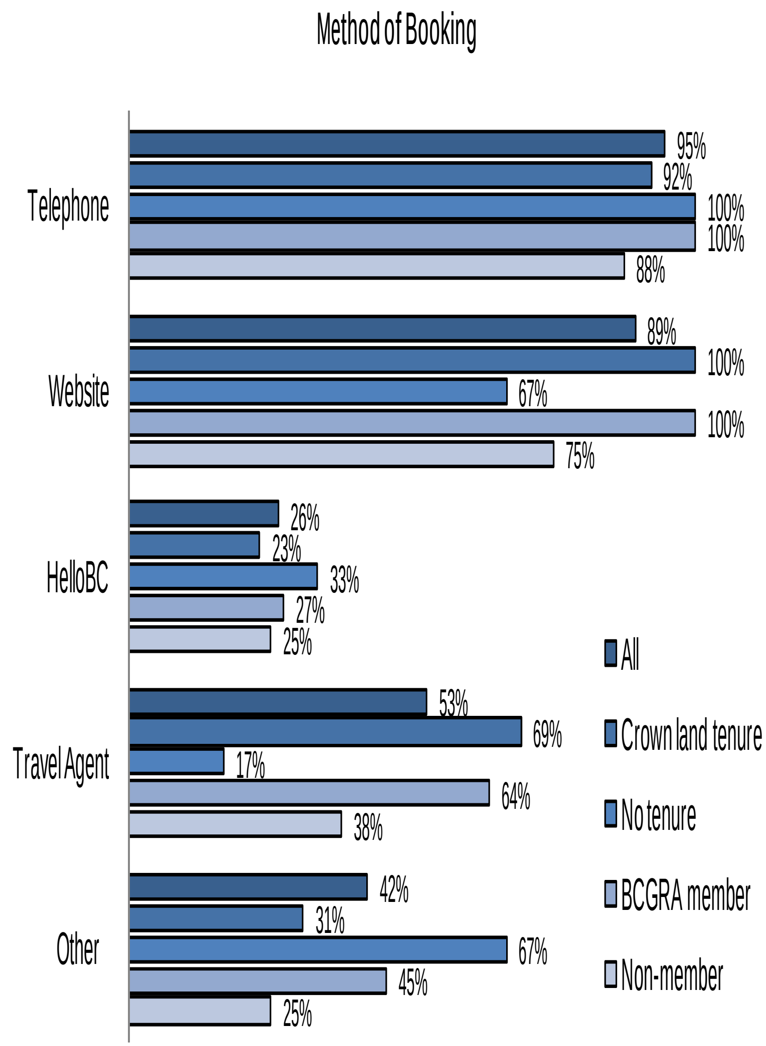
- Overall, the telephone was the most frequently used method for booking, with 95% of respondents receiving bookings through this method. A total of 89% mentioned they received bookings through the company website.

- All respondents with Crown land tenure mentioned they had received bookings through their websites, and nearly all (92%) had received bookings over the telephone.

- Among those with no tenure, all had received bookings over the telephone, while a considerably lower percentage (67%) received bookings through a company website.

- BCGRA members all reported they had received bookings both over the telephone and through company websites.

- Non-members were slightly more likely to have received a booking through the telephone (88%) as compared with the company website (75%).

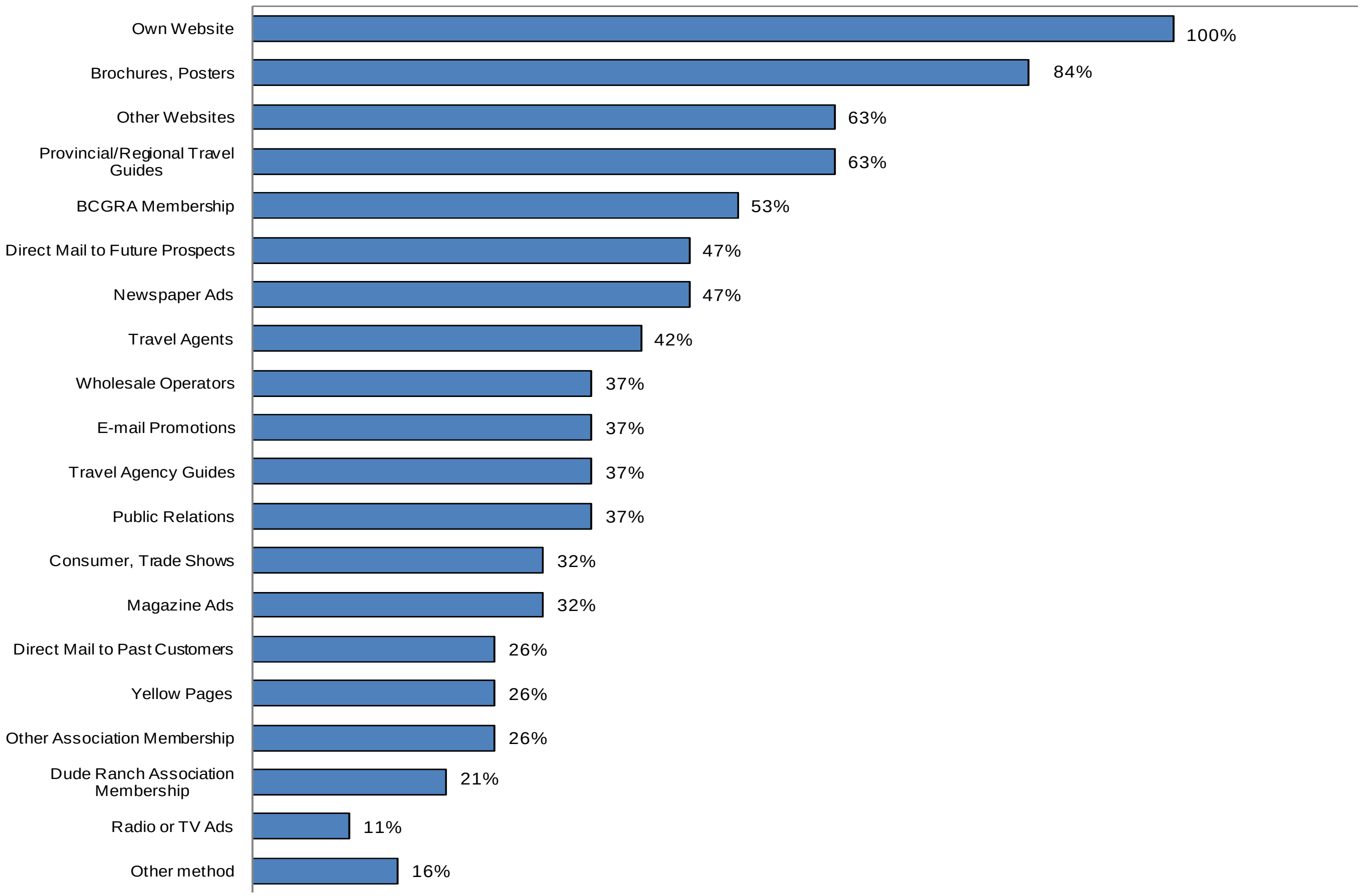


Note: Other responses included consumer/travel show, repeat clients booking their next stay at departure, tour operators, receptives, referrals, websites, tour wholesalers, and email.

Marketing & Advertising Activities

Marketing Methods

Respondents were asked to indicate which marketing methods they used in 2008. The chart below lists responses to this question for all guest ranch respondents.



Note: No respondents used film shows or slide shows as a marketing method in 2008. Similarly, no respondents selected "none" indicating that all used at least one of the marketing methods listed."Other Association Membership" included: BC Nature, Destination Spa Group, TM BC, TM VAN, LSG, DRA, local business association. "Other" included: signage and word of mouth.

Marketing Methods

What marketing methods did you use in 2008? (Crown land tenure and no tenure respondents only)

- The most often selected marketing methods for respondents with Crown land tenure included their own company website (100%), brochures and posters (85%), and other websites and BCGRA membership (69% each).

- Among respondents with no Crown land tenure, the most often used marketing methods were similar, with 100% stating they used their own company website, 83% selecting brochures and posters, and 67% selecting each of provincial/regional travel guides, newspaper ads, and public relations.

Marketing Methods Used		
	Crown land tenure	No tenure
Your Website	100%	100%
Brochures, Posters	85%	83%
Other Websites	69%	50%
Provincial/Regional Travel Guides	62%	67%
BCGRA Membership	69%	17%
Direct Mail to Future Prospects	46%	50%
Newspaper Ads	38%	67%
Travel Agents	54%	17%
Wholesale Operators	46%	17%
E-mail Promotions	46%	17%
Travel Agency Guides	38%	33%
Public Relations	23%	67%
Consumer, Trade Shows	38%	17%
Magazine Ads	31%	33%
Direct Mail to Past Customers	23%	33%
Yellow Pages	31%	17%
Other Association Membership	38%	-
Dude Ranch Association Membership	31%	-
Radio or TV Ads	8%	17%
Other method	23%	-

Marketing Methods

What marketing methods did you use in 2008? (BCGRA members and non-members only)

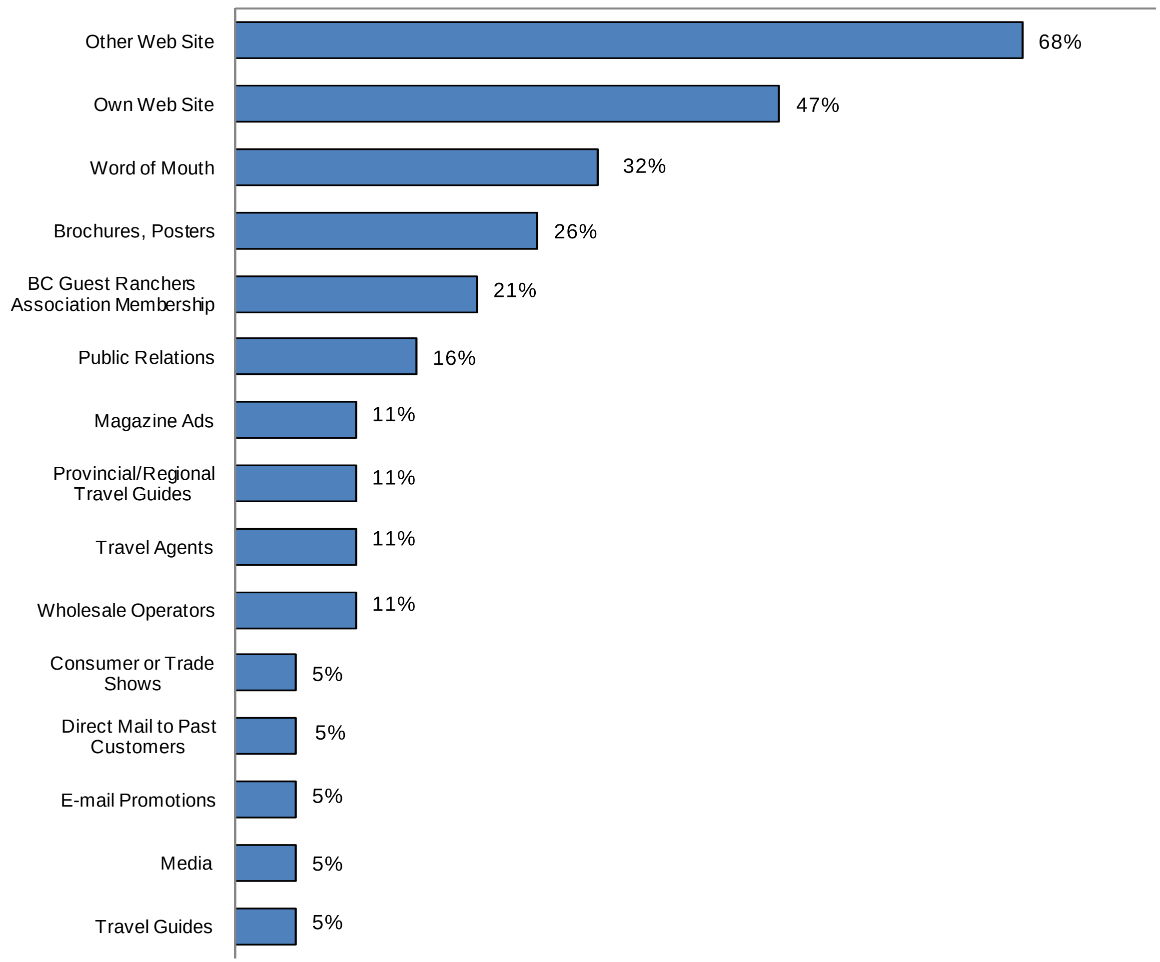
- The most often selected marketing methods for BCGRA members were their own company website (100%), BCGRA membership (91%), and brochures and posters (82%).

- Among respondents who were non-members, 100% stated they used their own company website, 88% selected brochures and posters, and 63% mentioned provincial and regional travel guides.

Marketing Methods Used		
	BCGRA member	Non-member
Your Website	100%	100%
Brochures, Posters	82%	88%
Other Websites	73%	50%
Provincial/Regional Travel Guides	64%	63%
BCGRA Membership	91%	-
Direct Mail to Future Prospects	55%	38%
Newspaper Ads	55%	38%
Travel Agents	45%	38%
Wholesale Operators	55%	13%
E-mail Promotions	64%	-
Travel Agency Guides	36%	38%
Public Relations	36%	38%
Consumer, Trade Shows	36%	25%
Magazine Ads	45%	13%
Direct Mail to Past Customers	27%	25%
Yellow Pages	36%	13%
Other Association Membership	36%	13%
Dude Ranch Association Membership	36%	-
Radio or TV Ads	18%	-
Other method	18%	13%

Marketing Methods

In 2008, what were your top three most effective marketing methods? (All guest ranch respondents)



Marketing Methods

In 2008, what were your top three most effective marketing methods? (Crown land tenure and no tenure respondents only)

- A total of 62% of Crown land tenured respondents listed another website as one of the top three most effective marketing methods. This was followed by their own website (46%), and word of mouth (46%).
- Among respondents with no Crown land tenure, 83% listed another website as one of the top three most effective marketing methods. The company website and brochures and posters were also most likely to be ranked in the top three, with 50% each.

Most Effective Marketing Methods		
	Crown land tenure	No tenure
Other Web Site	62%	83%
Own Web Site	46%	50%
Word of Mouth	46%	-
Brochures, Posters	15%	50%
BC Guest Ranchers Association Membership	31%	-
Public Relations	8%	33%
Magazine Ads	8%	17%
Provincial/Regional Travel Guides	15%	-
Travel Agents	15%	-
Wholesale Operators	8%	17%
Consumer or Trade Shows	8%	-
Direct Mail to Past Customers	8%	-
E-mail Promotions	8%	-
Media	8%	-
Travel Guides	8%	-

Marketing Methods

In 2008, what were your top three most effective marketing methods? (BCGRA members and non-members only)

- Nearly three quarters (73%) of BCGRA members listed another website as one of the top three most effective marketing methods. This was followed by their own company website (55%), and word of mouth (27%).

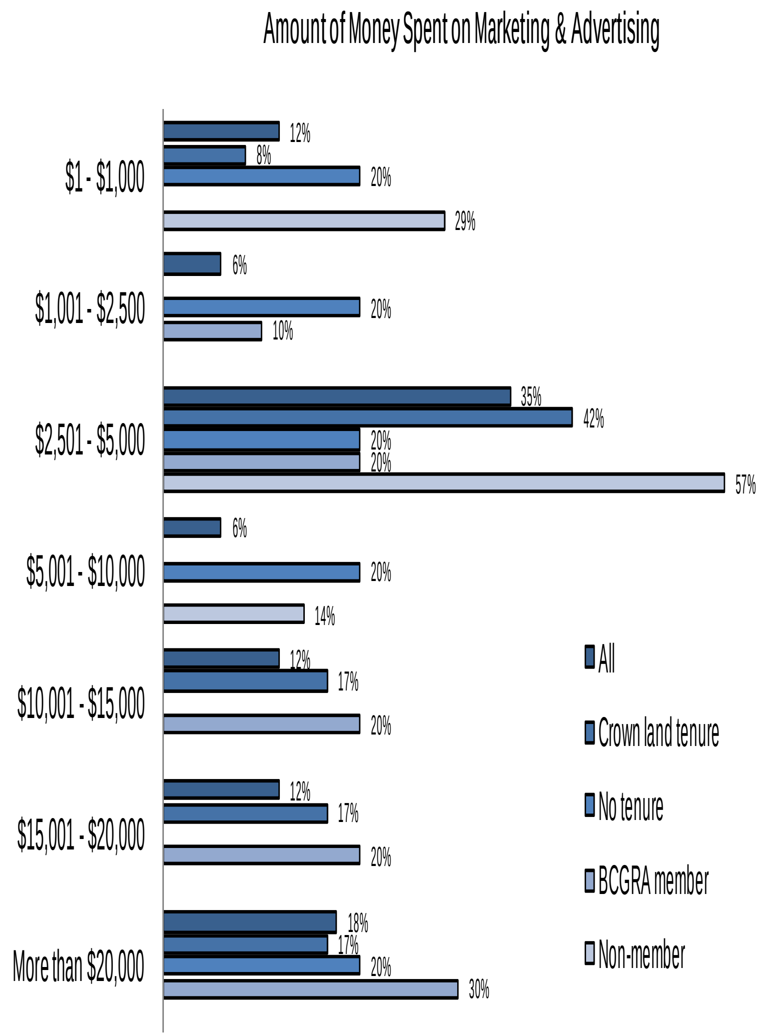
- Among non-members, 63% mentioned another website as one of the top three most effective marketing methods. Brochures and posters were ranked among the top three by 50%, while the company website and word of mouth were selected by 38%, each.

Most Effective Marketing Methods		
	BCGRA member	Non-member
Other Web Site	73%	63%
Own Web Site	55%	38%
Word of Mouth	27%	38%
Brochures, Posters	9%	50%
BC Guest Ranchers Association Membership	36%	-
Public Relations	18%	13%
Magazine Ads	9%	13%
Provincial/Regional Travel Guides	-	25%
Travel Agents	18%	-
Wholesale Operators	9%	13%
Consumer or Trade Shows	9%	-
Direct Mail to Past Customers	9%	-
E-mail Promotions	9%	-
Media	9%	-
Travel Guides	9%	-

Expenditures for Marketing and Advertising

How much did your business spend on marketing and advertising in 2008?

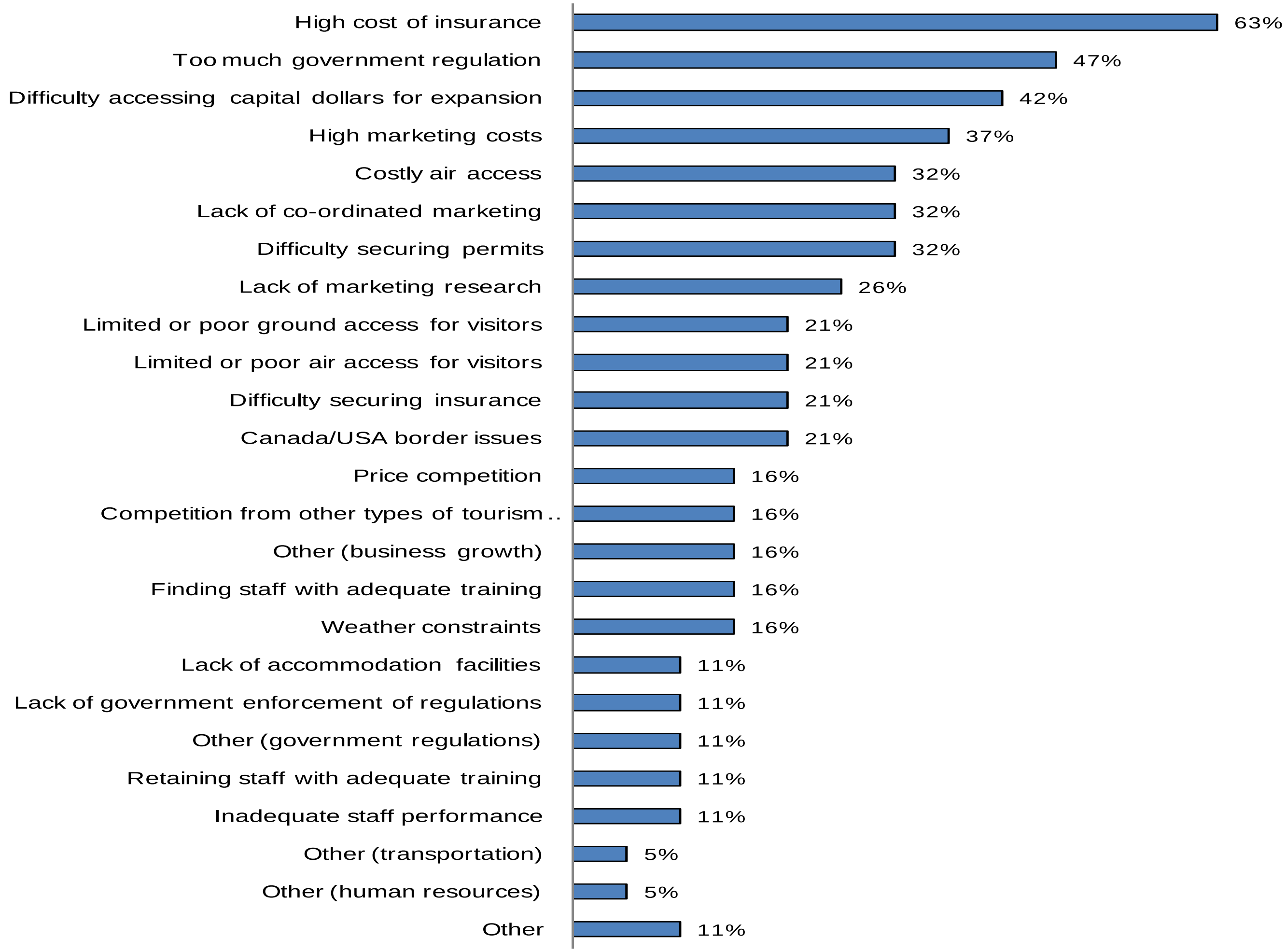
- Among all respondents, over one third (35%) spent between $2,501 and $5,000 on marketing and advertising in 2008.
- The percent spending between $2,501 and $5,000 was slightly higher among those with Crown land tenure, at 42%.
- Among those with no tenure, spending on marketing and advertising was evenly split, with 20% spending between $1 and $1,000 and 20% spending more than $20,000.
- BCGRA members were more likely to spend more, with 30% spending more than $20,000.
- Over half (57%) of non-members spent between $2,501 and $5,000.



Constraints / Opportunities to Growth

Constraints to Business Growth

Guest ranch businesses were asked to indicate the degree to which each possible business concern was a constraint to future growth. The figure below lists the proportion of respondents who rated each constraint as either moderate or serious.



Note: Percentages represent percent of total respondents. For this question, blank responses were interpreted as N/A or not a constraint. Please see appendices for written responses included under 'Other'. Items with zero respondents indicating moderate or serious constraint have been omitted from the analysis.

Constraints to Business Growth

Constraints to future business growth rated serious or moderate by Crown land tenure and no tenure respondents only.

- Among those with Crown land tenures, the high cost of insurance was listed as a moderate or serious business constraint most often (77%) of respondents in this group. This was followed by too much government regulation (54%) and difficulty securing permits (46%).

- Those with no Crown land tenure were more likely to rate difficulty accessing capital dollars for expansion as a serious or moderate constraint (67%). The same percent of respondents in this group also rated high marketing costs and lack of co-ordinated marketing as a constraint.

Constraints to Business Growth for Tenured & Non-Tenured Businesses		
	Crown land tenure	No tenure
High cost of insurance	77%	33%
Too much government regulation	54%	33%
Difficulty accessing capital dollars for expansion	31%	67%
High marketing costs	23%	67%
Costly air access	38%	17%
Lack of co-ordinated marketing	15%	67%
Difficulty securing permits	46%	-
Lack of marketing research	23%	33%
Limited or poor ground access for visitors	15%	33%
Limited or poor air access for visitors	15%	33%
Difficulty securing insurance	15%	33%
Canada/USA border issues	31%	-
Price competition	23%	-
Competition from other types of tourism products/activities	15%	17%
Finding staff with adequate training	8%	33%
Weather constraints	15%	17%
Lack of accommodation facilities	8%	17%
Lack of government enforcement of regulations	15%	-
Retaining staff with adequate training	8%	17%
Inadequate staff performance	15%	-

Note: Percentages represent percent of total respondents. For this question, blank responses were interpreted as N/A or not a constraint. All "Other" items have been removed from this table. Items with zero respondents indicating moderate or serious constraint have also been omitted from the analysis.

Constraints to Business Growth

Constraints to future business growth rated serious or moderate by BCGRA members and non-members only.

- BCGRA members were most likely to identify the high cost of insurance (55%), costly air access (55%), and too much government regulation (45%) as serious or moderate constraints to future business growth.

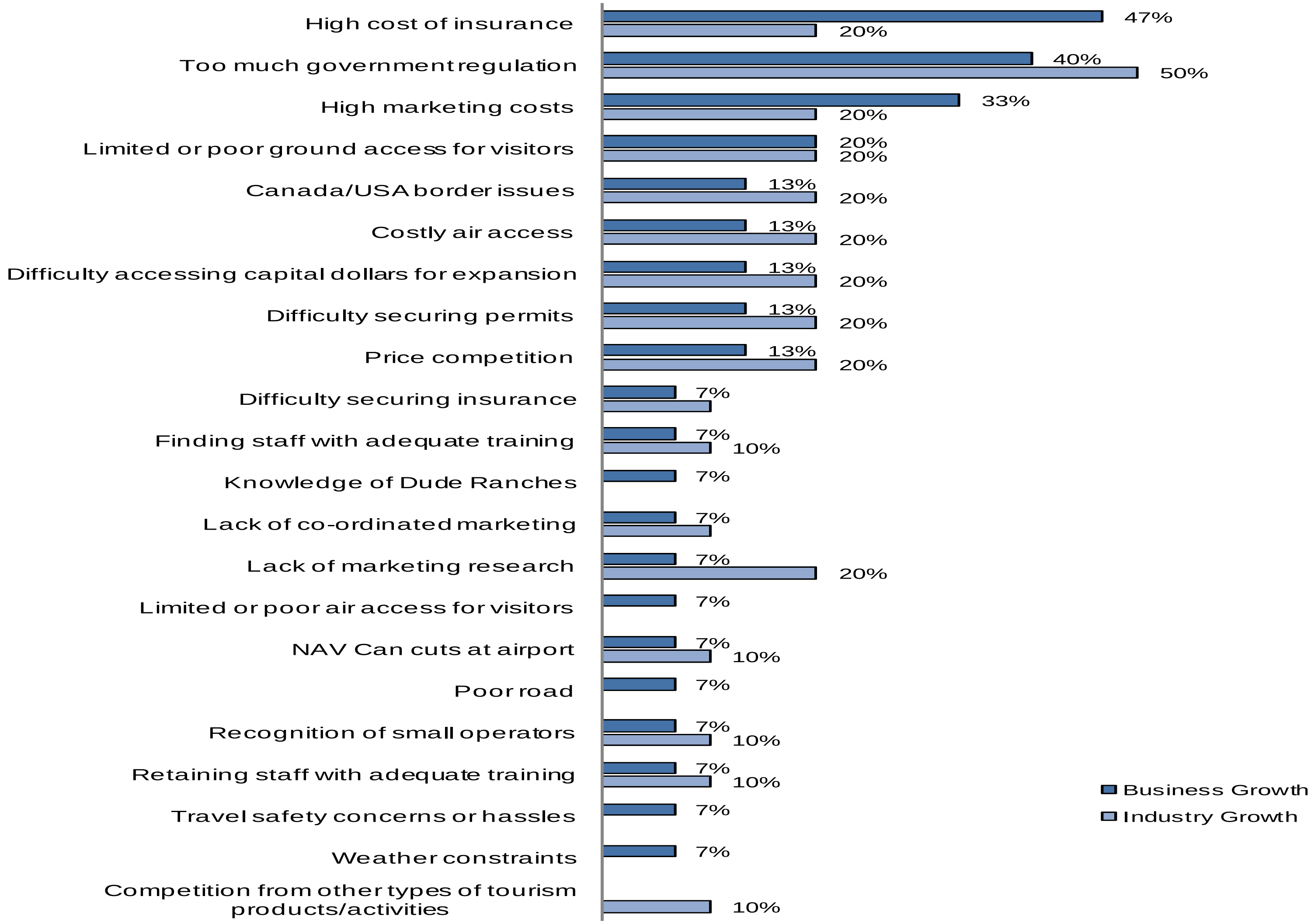
- Among non-members, the top rated constraints to business growth included the high cost of insurance (75%), too much government regulation (50%), difficulty accessing capital for expansion (50%), high marketing costs (50%), and lack of co-ordinated marketing efforts (50%).

Constraints to Business Growth for Member & Non-Member Businesses		
	BCGRA member	Non-member
High cost of insurance	55%	75%
Too much government regulation	45%	50%
Difficulty accessing capital dollars for expansion	36%	50%
High marketing costs	27%	50%
Costly air access	55%	-
Lack of co-ordinated marketing	18%	50%
Difficulty securing permits	36%	25%
Lack of marketing research	27%	25%
Limited or poor ground access for visitors	27%	13%
Limited or poor air access for visitors	27%	13%
Difficulty securing insurance	18%	25%
Canada/USA border issues	27%	13%
Price competition	27%	-
Competition from other types of tourism products/activities	18%	13%
Other (business growth)	9%	25%
Finding staff with adequate training	9%	25%
Weather constraints	9%	25%
Lack of accommodation facilities	-	25%
Lack of government enforcement of regulations	18%	-
Retaining staff with adequate training	-	25%
Inadequate staff performance	9%	13%

Note: Percentages represent percent of total respondents. For this question, blank responses were interpreted as N/A or not a constraint. All "Other" items have been removed from this table. Items with zero respondents indicating moderate or serious constraint have also been omitted from the analysis.

Top Ranked Constraints to Business & Industry Growth

Respondents were asked to rank the top three constraints to future growth for their business and for the industry. The chart below shows the results for all respondents.



Top Ranked Constraints to Business & Industry Growth

Top ranked constraints to future growth in their business and in the industry - Crown land tenure and no tenure respondents only.

- Among respondents with Crown land tenure, 50% ranked the high cost of insurance as a top constraint to the future growth of their business. However, only 25% felt this was a top constraint to growth in the industry as a whole.

- Respondents with no tenure were evenly divided on a number of items considered to be top constraints for growth in their own businesses; however, all agreed that difficulty accessing capital was a top constraint to future growth in the industry.

Top Ranked Constraints to Business & Industry Growth for Tenured & Non-Tenured Businesses				
	Crown land tenure		No tenure	
	Business	Industry	Business	Industry
High cost of insurance	50%	25%	33%	-
Too much government regulation	50%	63%	-	-
High marketing costs	33%	25%	33%	-
Limited or poor ground access for visitors	17%	13%	33%	50%
Canada/USA border issues	17%	25%	-	-
Costly air access	17%	13%	-	50%
Difficulty accessing capital dollars for expansion	8%	-	33%	100%
Difficulty securing permits	17%	25%	-	-
Price competition	8%	25%	33%	-
Difficulty securing insurance	8%	13%	-	-
Finding staff with adequate training	8%	13%	-	-
Knowledge of Dude Ranches	8%	-	-	-
Lack of co-ordinated marketing	-	13%	33%	-
Lack of marketing research	8%	25%	-	-
Limited or poor air access for visitors	-	-	33%	-
NAV Can cuts at airport	-	-	33%	50%
Poor road	8%	-	-	-
Recognition of small operators	8%	13%	-	-
Retaining staff with adequate training	8%	13%	-	-
Travel safety concerns or hassles	8%	-	-	-
Weather constraints	-	-	33%	-
Competition from other types of tourism products/activities	-	-	-	50%

Top Ranked Constraints to Business & Industry Growth

Top ranked constraints to future growth in their business and in the industry – BCGRA members and non-member respondents only.

- BCGRA members noted several items as equally important constraints to future growth in their own business; however, half (50%) rated too much government as a top constraint to future growth in the industry.

- Among non-members, both the high cost of insurance and too much government were rated as top constraints to business growth by 50% of respondents. These were also top ranked constraints to industry growth, with 67% mentioning the high cost of insurance and 50% indicating too much government.

Top Ranked Constraints to Business & Industry Growth for Member & Non-Member Businesses	BCGRA Member		Non-member	
	Business	Industry	Business	Industry
High cost of insurance	33%	-	50%	67%
Too much government regulation	33%	50%	50%	50%
High marketing costs	33%	17%	25%	33%
Limited or poor ground access for visitors	33%	33%	-	-
Canada/USA border issues	11%	17%	25%	17%
Costly air access	22%	17%	25%	-
Difficulty accessing capital dollars for expansion	22%	17%	25%	-
Difficulty securing permits	-	17%	25%	33%
Price competition	11%	33%	-	17%
Difficulty securing insurance	11%	17%	-	-
Finding staff with adequate training	-	-	25%	17%
Knowledge of Dude Ranches	11%	-	-	-
Lack of co-ordinated marketing	-	17%	-	17%
Lack of marketing research	11%	33%	-	-
Limited or poor air access for visitors	-	-	-	17%
NAV Can cuts at airport	11%	17%	-	-
Poor road	11%	-	-	-
Recognition of small operators	-	-	25%	17%
Retaining staff with adequate training	11%	17%	-	-
Travel safety concerns or hassles	11%	-	-	-
Weather constraints	-	-	-	17%
Competition from other types of tourism products/activities	-	-	25%	-

Top Priorities for the BCGRA

Respondents were asked to indicate from among the list of industry constraints, which ones they thought should be the top three priorities for the BCGRA.

- Among all respondents, high marketing costs was most often selected as a top priority for the BCGRA (36% of all respondents). This was followed by the high cost of insurance (29%), tenure fee structure (21%), and too much government regulation (21%).

- BCGRA members also indicated that limited or poor air and ground access for visitors (25% each) should be a priority for the association.

Priorities for the BCGRA to Address	All	Crown land tenure	No tenure	BCGRA member	Non-member
High marketing costs	36%	33%	40%	38%	33%
High cost of insurance	29%	22%	40%	25%	33%
Tenure fee structure	21%	33%	-	13%	33%
Too much government regulation	21%	33%	-	25%	17%
Difficulty securing permits	14%	22%	-	13%	17%
Lack of co-ordinated marketing	14%	11%	20%	-	33%
Limited or poor air access for visitors	14%	-	40%	25%	-
Limited or poor ground access for visitors	14%	-	40%	25%	-
Costly air access	7%	-	20%	-	17%
Difficulty accessing capital dollars for expansion	7%	11%	-	13%	-
Difficulty developing a good working relationship with First	7%	11%	-	13%	-
GST/HST	7%	11%	-	13%	-
Lack of government enforcement of regulations	7%	11%	-	13%	-
Lack of marketing research	7%	11%	-	13%	-
Low interest loan	7%	-	20%	-	17%
Price competition	7%	-	20%	-	17%
Professionalism of member ranchers	7%	11%	-	13%	-

Most Promising Opportunities

What do you feel are the three most promising opportunities for your business?

- All of the following were mentioned as promising areas of opportunity. For cases where the same item was mentioned by multiple respondents, the number has been noted in brackets.

  - Development / expansion of area (4)
  - Marketing (4)
  - Word of mouth (3)
  - Direct flights / visitors access (2)
  - Quality of service (2)
  - Eco based adventures
  - Events
  - Funding
  - Good ground access for visitors
  - Good location
  - Good working relationship with First Nations
  - Internet / Website
  - Local staff
  - Member of BCGRA
  - Price competition
  - Promotions
  - Reduced insurance costs
  - Retaining staff
  - School programs
  - Unique program

What do you feel are the three most important things that could be done by your business, the government, and/or BCGRA, to help you grow a more profitable business?

- All of the following were mentioned as areas of importance that could assist guest ranch operators to grow a more profitable business. For cases where the same item was mentioned by multiple respondents, the number has been noted in brackets.

- Marketing / Promotions (8)
- Improve land access (2)
- Integrated marketing (2)
- Low taxes (2)
- Designated trails for horseback riding
- Expand activities offered
- Flexibility
- Funding
- Gold Stamp approval
- Improve air access
- Lessen government regulations
- Local government accessible services
- Logging alternatives
- Road improvement
- Stop illegal operation
- Streamline application process for Crown land use permits
- Make a movie about BC guest ranches

Comments/Suggestions

When asked to provide additional comments, one respondents stated the following:

"…I would like to see the bar raised, more ranches encouraged to meet the criteria to become BCGRA members. Ultimately giving us more member ranches, more marketing dollars and better selection of professional tourism ranch product for our visitors. If we are able to compete on a global scale with other guest ranch destinations, this integrated approach is the only way to go and in years from now the experiences of our guests will say it all. BC is the place to go if you want a ranch vacation. Thanks for all your hard work to help us achieve success!"

**Note: See appendices for all verbatim comments*

Summary, Recommendations & Conclusions

Summary

BC Guest Ranch Industry & Clients:

- Most guest ranch businesses are small to medium sized, serving a client base that is relatively young (35-44 years), and travelling in small groups of family, couples, or friends.
- The majority of clients originated from British Columbia, with those from Europe also comprising a sizeable proportion. Visitors were primarily motivated to engage in guest ranch activities, and a large proportion of clients were making a repeat visit to the ranch.
- Responses concerning the volume of clients in 2008 compared with 2007 have been mixed with some businesses indicating a small increase (i.e., non-tenured and non-member), a minimal decrease (i.e., BCGRA members) or no change (i.e., tenured).

Marketing & Advertising:

- Online sources, BCGRA membership and the traditional travel guides are the most commonly used sources of marketing, while conventional PR and media are still utilized.
- Marketing/advertising was identified by all guest ranches as the most promising area of opportunity for business growth and profitability; a need for an integrated approach was often noted by respondents.

Recommendations/Conclusions

Constraints / Opportunities for Guest Ranch Businesses:

- The high cost of insurance, dealing with issues related to land use and permits, and government regulation are considered among guest ranch respondents as the largest barriers to growth in the industry.
- Guest ranchers want BCGRA in partnership with government to prioritize increasing co-ordinated marketing efforts with partners to capitalize on marketing and advertising.
- Guest ranch businesses also report a need to reduce government regulation and the cost and time associated with insurance and permits.
- This suggests increasing investment in marketing, and reducing constraints will encourage increased business development and improve profitability.

"...Tourism is a huge part of BC. We have a beautiful province and this is a viable and important industry!"

"…If we are able to compete on a global scale with other guest ranch destinations, [an] integrated approach is the only way to go..."

"... More focus on the BCGRA as an organization helps marketing dollars go further...."

Limitations

Limitations

There are limitations to the research findings in this report:

- Due to a low overall response rate (33%), analysis provided in this report should not be used to represent or reflect the guest ranch sector in British Columbia as a whole. It is merely the aggregated results of participating guest ranches. Likewise, an estimate of total industry gross revenue and number of clients was not possible due to the small sample size and lack of industry information for creating weights.

- The research was undertaken during the busy season for businesses and, therefore, some businesses may have been too busy to participate.

- Although every effort was made to have a complete database, there may be businesses in BC that meet the definition of guest ranches for this research but were not included in the database.

- The Integrated Land Management Bureau provided a list of all nature-based businesses with tenure. This list was used to determine which respondents did/did not have tenure. Every effort was made to match respondents with business name, owner's name or business location based on the bureau's list.

- Many of the questions required respondents to indicate ranges of values or percentages. Consequently, many stated values may be based on best estimates as opposed to actual values.

- Data regarding clients were, in many cases, best estimates by respondents, as this survey did not collect data directly from clients.

- Gross revenue estimates by business do not include tourist spending on accommodation, food, fuel, and incidentals that may occur pre and post guest ranch trip. Additionally, the gross revenue estimates do not include indirect and induced impacts of spending by guest ranch businesses.

Appendices

Appendix 1 – Questionnaire

TOURISM BRITISH COLUMBIA
CANADA

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

Research & Planning
Tourism British Columbia
1803 Douglas Street, 3rd Floor
Victoria, BC V8T 5C3

If you have any questions regarding this research, please call:
Carol Jenkins, Research Analyst, Tourism British Columbia, (250) 356-5800

Confidentiality of your survey responses is guaranteed. Research & Planning (Tourism BC) will not share your individual responses. All survey data is aggregated for the final report.

When answering this questionnaire, please use your **2008 Guest Ranch Season** as the reference period.

SECTION 1: YOUR BUSINESS'S SERVICES

1. In 2008, did you offer guest ranch-based activities or services to clients?

Guest ranch-based activities include any guest ranch-based business (offering overnight stays) which offer family ranch vacations, is a working guest ranch / dude ranch, and/or offers horseback riding (either trail ride or backcountry ride).

a) Yes → Please proceed to Question 2.

b) No → End of survey. Thank you for your time.
→ Please return this survey in the postage-paid envelope provided.

2. In order to understand your business and the services you offer better, please complete the following table

a) From the list below (and any you may add), which service(s) did your guest ranch offer in 2008?
b) How many years has your guest ranch been offering these service(s)?
c) What percentage of your clients used this service in 2008?
d) If any, which service(s) does your business offer, but through a partner supplier?
e) If any, which service(s) does your business offer during the winter?
f) Which service(s) are primary motivators for your clients' to choose your business over other vacations?

	Services	(a) *Please checkmark (√) all that apply.*	(b) *Number of years offering.*	(c) *Your total may come to more than 100% as some clients will have purchased more than one service.*	(d) *Please checkmark (√) all services that are offered by your business but through a partner supplier*	(e) *Please checkmark (√) all services that your business offers during the winter months*	(f) *Please checkmark (√) all services that you believe are primary motivators for your clients selecting your business over others*
1	Family vacations	☐	____ yrs	____ %	☐	☐	☐
2	Working cattle ranch	☐	____ yrs	____ %	☐	☐	☐
3	Trail rides	☐	____ yrs	____ %	☐	☐	☐
4	Pack trips	☐	____ yrs	____ %	☐	☐	☐
5	Accommodations	☐	____ yrs	____ %	☐	☐	☐
6	Spa services	☐	____ yrs	____ %	☐	☐	☐
7	Interpretive eco-tours	☐	____ yrs	____ %	☐	☐	☐
8	Hiking	☐	____ yrs	____ %	☐	☐	☐
9	First Nations Activities ____________	☐	____ yrs	____ %	☐	☐	☐
10	Meals (non-gourmet)	☐	____ yrs	____ %	☐	☐	☐
11	Gourmet Cuisine (with a trained chef)	☐	____ yrs	____ %	☐	☐	☐
12	Other ____________	☐	____ yrs	____ %	☐	☐	☐
13	Other ____________	☐	____ yrs	____ %	☐	☐	☐
14	Other ____________	☐	____ yrs	____ %	☐	☐	☐
15	Other ____________	☐	____ yrs	____ %	☐	☐	☐
16	Other ____________	☐	____ yrs	____ %	☐	☐	☐
17	Other ____________	☐	____ yrs	____ %	☐	☐	☐

2

3. From the list of the services your business offers (previous page) and its corresponding number (to the left of the service); please rank your business's top three revenue generating services in the space provided below.

______ = 1st biggest revenue generator

______ = 2nd biggest revenue generator

______ = 3rd biggest revenue generator

4. What is the best description of the accommodations which you provide for your guests?
(Please check (√) one answer only)

- ☐ We don't offer accommodations → *End of survey. Thank you for your time. Please return this survey in the envelope provided.*
- ☐ Rustic
- ☐ Rustic /Moderate
- ☐ Moderate
- ☐ Moderate/Luxury
- ☐ Luxury
- ☐ Other ________________________

5. The following questions are to gather information on the number of meals per-day you offered your clients and whether or not they were part of a package.

a) From the list below, please select which meals you provided per-day (2009) for your guests?

b) Was the meal offered as part of a package?

(a)		(b)		
Please checkmark (√) the meals you offer		*Part of a package*	*Not part of a package*	*Either part of or not part of, depending on client's preference*
☐	Breakfast only	☐	☐	☐
☐	Lunch only	☐	☐	☐
☐	Dinner only	☐	☐	☐
☐	Breakfast & lunch	☐	☐	☐
☐	Breakfast & dinner	☐	☐	☐
☐	Lunch & dinner	☐	☐	☐
☐	Breakfast, lunch & dinner	☐	☐	☐
☐	No meals provided	N/A	N/A	N/A

SECTION 2: YOUR CUSTOMER

(Please answer this section as best you can and use educated guesstimates if you don't keep the information in your databases.)

6. Approximately how many clients (total clients), participating in guest ranch-based activities, did your business serve in 2009?

____________ = **ESTIMATED Number of CLIENTS** who participated in guest ranch-based activities

7. Approximately what percentage of your 2009 clients participating in guest ranch-based activities were repeat clients?
(A repeat client has purchased your products or services on at least one previous occasion)

________% **REPEAT CLIENTS** participating in guest ranch-based activities

3

8. In 2009, approximately what percentage of your clients who participated in guest ranch based activities were tourists?
(A tourist is defined as someone who is not a resident of your community)

________% of clients who were **TOURISTS**

9. Compared to 2007, did the volume of your *total* clients who participated in guest ranch-based activities increase, decrease, or stay the same as 2009?

- ☐ Increased → By approximately what percent? __________ %
- ☐ Decreased → By approximately what percent? __________ %
- ☐ Stayed the same

10. Please indicate what percentage of your 2009 clients came from each of the following geographic markets?
(Please mark zero percent (0%) if there were no tourist clients in a particular group)

_____% within British Columbia	_____% North Eastern US (New England States, New York)
_____% Alberta	_____% California
_____% Ontario	_____% Other US
_____% Other Canada	_____% United Kingdom
_____% Washington	_____% Germany/Austria/Switzerland
_____% Oregon	_____% Other Europe
_____% Montana	_____% Asia
_____% Alaska	_____% Other __________________

= **100% TOTAL**

11. Approximately what percentage of your clients, who participated in guest ranch-based activities, were male and what percentage were female in 2009?

_____% Male _____% Female = **100 % TOTAL**

12. Approximately what percentage of your 2009 clients, participating in guest ranch-based activities, were in each of the following age categories? *(Please mark zero percent (0%) if there were no clients in a particular group)*

_____% 17 years or younger

_____% 18 to 24 years

_____% 25 to 34 years

_____% 35 to 44 years

_____% 45 to 54 years

_____% 55 to 64 years

_____% 65 to 74 years

_____% 75 years and over

100 % TOTAL

4

Appendix 1 – Questionnaire

13. Has the age distribution of your clients, participating in guest ranch-based activities, changed in the last 10 years (or since opening, if operating for less than 10 years)?

☐ Yes *(Please briefly explain below)*
☐ No

____

____

14. Thinking about your clients from 2009, approximately what percentage who participated in guest ranch-based activities, were within each of the following categories?
(Please mark zero percent (0%) if there were no clients in a particular group)

_____% Individual
_____% Couples
_____% Families → What is the average number of people in the families? ________ (avg. # of people)
_____% Group of Friends
_____% Tour Group → What is the average number of people in tour groups? ________ (avg. # of people)
_____% Other ____________________
100 % TOTAL

15. The following question has been developed to determine the number of male only groups and female only groups you provided guest ranch-related services to in 2009.
(For the purpose of this question, groups include: families, friends and tour groups)

Approximately what percentage of your 2009 groups, who participated in guest ranch-based activities, were within each of the following categories? *(Please mark zero percent (0%) if you did not provide service to any of the categories below)*

_____% Male only _____% Female only _____% Both males & females = **100 % TOTAL**

16. When thinking about the number of nights your guests stay with you in your 2009 season, please provide percentages for the number of your guests who stay within each category provided below.
(Please mark zero percent (0%) if there were no clients in a particular group)

______% who stayed 1 night	______% who stayed 8- 14 nights
______% who stayed 2-3 nights	______% who stayed 15-21 nights
______% who stayed 4-5 nights	______% who stayed 22 or more nights
______% who stayed 1 week	______% Other ________________

= **100% TOTAL**

17. How far in advance did your 2009 season guests book with you? Please provide percentages for the number of your guests who made reservations with you within each category provided below.
(Please mark zero percent (0%) if there were no clients in a particular group)

______% day of	______% 3-4 months
______% 1 -2 weeks	______% 5-6 months
______% 3-4 weeks	______% 7-12 months
______% 1 - 2 moths	______% over 1 year

= **100% TOTAL**

5

18. What method(s) did your 2009 clients use to book with you?
(Please check (√) all that apply)

☐ Telephone
☐ Through my business's website
☐ Through HelloBC (either Hellobc.com or 1-800-HelloBC)
☐ Travel Agent
☐ Other ____________________

19. What percentage of your 2009 clients regarded participating in guest ranch-based activities to be the main reason for their travel to your community?

__________% of **CLIENTS** who visited your community mainly to participate in guest ranch-based activities

SECTION 3: YOUR STAFF

20. Please fill in the table below with corresponding answers pertaining to your full and part-time paid staff, and your volunteer staff. *(Please include yourself and any paid family members working for your company)*

What months did you employ full or part-time paid staff? *Please checkmark all that apply (√)*		**How many full-time paid staff did you employ in each month listed below?** *Fill in the number of full-time staff you had in each month. Full-time staff worked 30 hours or more per week.*	**How many part-time paid staff did you employ in each month listed below?** *Fill in the number of part-time staff you had in each month. Part-time staff worked less than 30 hours per week.*	**How many volunteer staff did you employ in each month listed below?** *Fill in the number of volunteer staff you had in each month.*
		# of **full-time** staff per month	# of **part-time** staff per month	# of **volunteer** staff per month
2009				
January	☐	______	______	______
February	☐	______	______	______
March	☐	______	______	______
April	☐	______	______	______
May	☐	______	______	______
June	☐	______	______	______
July	☐	______	______	______
August	☐	______	______	______
September	☐	______	______	______
October	☐	______	______	______
November	☐	______	______	______
December	☐	______	______	______
2009				
January	☐	______	______	______
February	☐	______	______	______
March	☐	______	______	______
April	☐	______	______	______

6

Appendix 1 – Questionnaire

SECTION 4: YOUR MARKETING & ADVERTISING ACTIVITIES

21. Please fill in the table on the following page.

a) What marketing methods did you use in 2009?

b) For each method used, please indicate the approximate percentage of your total marketing budget that you allocated to this method in 2009.
(For each marketing method selected, fill in the appropriate percentages in COLUMN (b). The total should equal 100)

Marketing Methods	(a) 2009 Methods (√) *(if "none", check none at bottom of table)*	(b) % of Total Marketing Budget
Brochures, Posters	☐	_____ %
Consumer or Trade Shows	☐	_____ %
Travel Agents	☐	_____ %
Wholesale Operators	☐	_____ %
Direct Mail to Future Prospects	☐	_____ %
Direct Mail to Past Customers	☐	_____ %
E-mail Promotions	☐	_____ %
Film Shows, Slide Shows	☐	_____ %
Newspaper Ads	☐	_____ %
Your Web Site	☐	_____ %
Other Web Site	☐	_____ %
Provincial/Regional Travel Guides	☐	_____ %
Travel Agency Travel Guides	☐	_____ %
Radio or Television Ads	☐	_____ %
Magazine Ads	☐	_____ %
Public Relations	☐	_____ %
Yellow Pages	☐	_____ %
BC Guest Ranchers Association Membership	☐	_____ %
Dude Ranch Association Membership	☐	_____ %
Other Association Membership *(please specify which one)*: ____________	☐	_____ %
Other: ____________	☐	_____ %
None	☐	N/A
TOTAL		= 100 %

22. In 2009, what were your top-three (3) most effective marketing methods?

1. ____
2. ____
3. ____

23. How much did your business spend on marketing and advertising in 2009?
(Please check (√) one answer only)

☐ nothing	☐ $5,001 – 10,000
☐ $1 – 1,000	☐ $10,001 – 15,000
☐ $1,001 – 2,500	☐ $15,001 – 20,000
☐ $2,501 – 5,000	☐ More than $20,001

7

SECTION 5: CONSTRAINTS/OPPORTUNITIES TO GROWTH

24. In order to understand your business and industry's (as a whole) constraints to future growth, please complete the following chart.

a) Considering the long-term growth of your business, please rate all of the constraints below.
(If the constraint listed does not apply to your business, please checkmark (√) in the box "not applicable")

b) Please rank from 1 to 3 your businesses' top three (3) constraints to future growth, where "1" is your biggest constraint.

c) Please rank from 1 to 3 your industry's top three (3) constraints to future growth, where "1" is your biggest constraint.

Constraints	(a) N/A	Not a Constraint	Slight Constraint	Moderate Constraint	Serious Constraint	(b) *Rank your Top 3 most serious constraints for your business's growth*	(c) *Rank your Top 3 most serious constraints for your industry's growth*
Transportation							
Limited or poor air access for visitors	☐	☐	☐	☐	☐		
Limited or poor ground access for visitors	☐	☐	☐	☐	☐		
Costly air access	☐	☐	☐	☐	☐		
Travel safety concerns or hassles	☐	☐	☐	☐	☐		
Other (transportation) ____________	☐	☐	☐	☐	☐		
Business Growth							
High marketing costs	☐	☐	☐	☐	☐		
Lack of marketing research	☐	☐	☐	☐	☐		
Difficulty accessing capital dollars for expansion	☐	☐	☐	☐	☐		
Lack of co-ordinated marketing	☐	☐	☐	☐	☐		
Difficulty securing permits	☐	☐	☐	☐	☐		
Difficulty securing insurance	☐	☐	☐	☐	☐		
High cost of insurance	☐	☐	☐	☐	☐		
Difficulty developing a good working relationship with First Nations	☐	☐	☐	☐	☐		
Price competition	☐	☐	☐	☐	☐		
Lack of accommodation facilities	☐	☐	☐	☐	☐		
Competition from other types of tourism products/activities	☐	☐	☐	☐	☐		
Other (business growth) ____________	☐	☐	☐	☐	☐		
Government Regulations							
Too much government regulation	☐	☐	☐	☐	☐		
Lack of government regulation	☐	☐	☐	☐	☐		
Lack of government enforcement of regulations	☐	☐	☐	☐	☐		
Canada/USA border issues	☐	☐	☐	☐	☐		
Other (govt. regulations) ____________	☐	☐	☐	☐	☐		
Human Resources							
Finding staff with adequate training	☐	☐	☐	☐	☐		
Retaining staff with adequate training	☐	☐	☐	☐	☐		
Inadequate staff performance	☐	☐	☐	☐	☐		
Other (human resources) ____________	☐	☐	☐	☐	☐		
Other Constraints							
Weather constraints	☐	☐	☐	☐	☐		
Other (any "other") ____________	☐	☐	☐	☐	☐		

8

25. Please use the space below to elaborate on any constraints your business or industry currently has as a result of *Government Regulations*.

____
____
____
____
____

26. Do you have any suggestions about how to address these current constraints you may have from *Government Regulations*?

____
____
____
____
____

27. Thinking of the most serious *Business* constraints you listed in Question 24 on the previous page, do you have any suggestions about how to address the issues that will impact your long-term growth? *(Please explain below)*

____
____
____
____
____

28. Thinking of the most serious *Industry* constraints you listed in Question 24 on the previous page, do you have any suggestions about how to address the issues that will impact your long-term growth? *(Please explain below)*

____
____
____
____
____

29. Thinking of all of the *Industry* constraints from Question 24 on the previous page, which ones do you think should be the top three priorities for the BC Guest Ranchers' Association (BCGRA) to address?

1. ____
2. ____
3. ____

30. What do you feel are the *three (3) most promising opportunities* for your business?

1. ____
2. ____
3. ____

9

31. What do you feel are the *three (3) most important things* that could be done by your business, the government, and/or BCGRA, to help you grow a more profitable business?

1. ____
2. ____
3. ____

SECTION 6: BUSINESS SPENDING & REVENUE

32. In 2009, approximately how much did your business personally spend on permits, including all crown land tenures, and Provincial and National Parks' permits?
(Please check (√) one answer only)

- ☐ $ 0 – 500
- ☐ $ 501 – 1,000
- ☐ $ 1,001 –1,500
- ☐ $ 1,501 – 2,000
- ☐ $ 2,001 – 2,500
- ☐ More than $2,500

33. In 2009, approximately how much time, overall, did you spend on issues related to tenure, land use, and permits? *(Please respond by indicating one of the following):*

_______________ # of **TOTAL HOURS** in **2009**
_______________ # of **TOTAL DAYS** (8 hours in a day) in **2009**
_______________ # of **TOTAL WEEKS** (7 days in a week) in **2009**

34. In 2009, how much did your company spend on liability insurance?

$ _________ = **COST OF LIABILITY INSURANCE**

35. Approximately what percentage of your 2009 gross revenue came from clients or guests who participated in guest ranch-related activities?

______ % of **2009 GROSS REVENUE** from clients participating in guest ranch-related activities.

36. In your 2009 season, what were your total gross revenues from products and services related to your guest ranch business? *(Please check (√) one answer only)*

- ☐ $ 0 – 100,000
- ☐ $ 100,001 – 200,000
- ☐ $ 200,001 – 300,000
- ☐ $ 300,001 – 400,000
- ☐ $ 400,001 – 500,000
- ☐ $ 500,001 – 600,000
- ☐ $ 600,001 – 700,000
- ☐ $ 700,001 – 800,000
- ☐ $ 800,001 – 900,000
- ☐ $ 900,001 – 1,000,000
- ☐ More than $1,000,000

37. In your 2009 season, what percentage of your gross revenue can be attributed to operating costs?

______ % of **2009 GROSS REVENUE** from operating costs.

10

38. Do you have any questions, comments, or concerns that you would like to share with us?

Thank you very much for your participation!

Your responses will be an important start in promoting the growth of the guest ranch sector in British Columbia, thus ensuring that the sector's importance is recognized and it has a strong voice in the province.

11

Appendix 2 – Open Ended Questions

Q2. What Other Services does your Guest Ranch Offer (Other - All)?
Bison farming
Canoeing
Fitness classes & programs
Guide training
Hot tub
Mountain biking
Overnight camp
Riding Instruction
Riding lessons
Sleigh rides
Special events
Art Exihibits, sculpture garden
Dances
Fishing
Gold panning
Life coaching
Mountain bikes
MTGs & Golf
Pedal boating
Hunting
Kayaks
Riding Therapy
Row boating
Ski
Snoshoeing
Studing

*Comments are verbatim except where identifiers have been censored.

Q2. What Other Services does your Guest Ranch Offer (Other - All)? (Cont.d)
Wildlife & Canyon Tours
Bird Watching
Bonfires
Canoes
Skating
fishing
Fly Fishing & Lessons
Sleigh rides
Snowshoeing
Haying participation
Snowshoeing & Cross-Country Skiing
X-Country skiing
Meeting Facilities
Wellness Packages

*Comments are verbatim except where identifiers have been censored.

Q13. Has the age distribution of your clients, participating in guest-ranch based activities, changed in the last 10 years?
Experiencing an increase in younger guests as well as boomers. Plus we now offer kids weeks, so more families with young children during those weeks.
I think we are unique in the fact ownership hasn't changed in 58 years and descendants of original customers still vacation here.
Increased family travel.
More 25-34 year olds.
More families
More older (60+) guests into hiking trips.
N/A - First year of opening
N/A - First year of opening

*Comments are verbatim except where identifiers have been censored.

Q25. Constraints that your business or industry currently has as a result of Government Regulations.
Commercial recreation tenure is too expensive for small operators. We do not even come close to meeting the minimum rate on a per client day basis.
Currently concerned with how the HST will factor into costs.
Difficulty in getting parks permits, due to a 10 year exclusive permits that were issued to any 3 businesses in the area. All regulations are based on large businesses, they don't take into account the smaller independent businesses.
Difficulty in obtaining licence to operate on Crown Land. Process is complex and lengthy. Bureaucracy of Interior Health Regulations. Cost of implementing high tech, large scale solutions for small businesses. My 8 bedroom resort treated with same rules as 500 bed resort - no scaling.
Having to pay for access to crown land, ie. using it for recreational business. We have severely entailed our use of crown land due to the fees.
Insecurity regarding HST. Every contract is subject to change.
It is costly both in time and dollars obtaining permits/tenures. "Multi use" is developing into a huge problem, i.e: ATV's, dirt bikes, seadoo's, etc. Noise levels, property, grassland and trail damage.
No direct sales of on the farm raised animals, eggs, etc. permitted. Cost of government inspected slaughter facilities too high.
The regulation for crown land fees brings too much work. To make a list for every client day to pay $1 more is nonsense for us and the government. To fill out a lot of forms for a small result in money for the government lets us stay way longer in the office than necessary.
To run a professional tourism product it is necessary to work within strict codes of government regulations. For example, we had to rezone our property, conduct environmental studies, generate a land management plan, obtain commercial tenure, obtain health permits and implement a full health and safety plan. Currently there is no way to distinguish between the guest ranches that do all this and those that don't (from a clients perspective).
While we are licensed through MOE we are a very low priority to them. We should not be licensed through a ministry that does not understand our needs.

Appendix 2 – Open Ended Questions

Q26. Suggestions about how to address the current constraints from Government Regulations.
Allow small farmers to sell chicken, geese, turkey, lamb, eggs, etc.
Extend the number of permits given out and to not be exclusive permits.
Government could support and encourage professional guest ranch businesses rather than impede growth and success. It is economic development after all. I would like to see a gold seal of approval for complying ranches (ie. BCGRA members) to set us apart from non-compliance ranches.
Health Authority needs to look at scaling appropriate solution for smaller facilities. Crown Land licence application needs to be simplified and quicker. Took 9 months to process my application despite fact that no objections were raised at any stage.
Introduce a different permit fee for small operators for commercial recreation tenures. Fees should be based on a part of revenue (%) or a client day basis – not a flat minimum fee.
One reasonable fee for every business as we have for a business license in every community would do it.
Register use of crown land but remove fees.
The discussion about HST yes/no needs to be finished. You can't plan with 50% less or more income.

*Comments are verbatim except where identifiers have been censored.

Appendix 2 – Open Ended Questions

Q27. Suggestions about how to address the issues that will impact your business's long-term growth.
(1) Improved air access to YVR, open skies; (2) Improve Duffy Lake road; (3) Improve Hwy # Cache Creek to Hope; (4) No cuts to Navcan services at BC Interior Airports.
(1) Insurance should be seasonal. We only ride June to September. No insurance company will issue a part year policy. (2) We are a small operation; revenue of less than $25,000 but we still offer a desirable service. BCGRA & TBC don't recognize us.
Advertising is our biggest constraint due to cost. Grants? Or other forms of financial help would affect this constraint. Also, financial aid on capital dollars for expansion.
Agriculture in tourism is a pressure from the government but the government forgot that the communities have to go see and so it doesn't work very well. Only if they work together it can be a success.
CRD doesn't enforce legal operation of guest ranches in our area. There are no tenures.
Encourage adventure-tourism insurance group deals.
Lobby for cheap air access (more companies)
Looked at ways that the passenger train could be reinstated to 100 Mile House. Support flight services to come to 100 Mile House. Shuttle services from Williams Lake airport.
Lower insurance rates. Better links between businesses, such as one go to person/business/associations.
Make reliable passport info accessible for potential travelers. The burden of financing reliable. New air service should be supported by gov, as it is a public service.
More available insurance to make it less pricey.
More open communication with local government, there appears to be a lack of understanding regarding our business operations. Some support would be nice and better of enforcement applied to the non-compliance businesses rather than pressure on the business who work hard to meet regulations. (Seems once you are on the radar everything applies, but some business apparently fly under the radar!)
TBC has already made significant progress on this with the experienced programme. However more research on the industry is necessary to better understand the size of the market and the real competitor. This survey is a big step in the right direction.
The discussion about HST yes/no needs to be finished. You can't plan with 50% less or more income.
Word of mouth is helping to cut down on advertising expenses.

*Comments are verbatim except where identifiers have been censored.

Q28. Suggestions about how to address the issues that will impact your industry's long-term growth.
A more integrated approach is needed, historically businesses have pretty much marketed alone. More focus on the BCGRA as an organization helps marketing dollars go further.
Agriculture in tourism is a pressure from the government but the government forgot that the communities have to go see and so it doesn't work very well. Only if they work together it can be a success.
Lower insurance rates. Better links between businesses, such as one go to person/business/associations.
Make it easier to hire from abroad, eg. chefs.
Make loans at less interest.
Membership fees are prohibitive for small operators. Insurance costs and policies should be cheaper; based on revenue and months of operations. Cost of hay and grain are market driven and fluctuate greatly.
Simplify offer, less variety.
Since many of clients come to me for horseback riding therapy, and we have long winters, we are researching indoor riding arenas. We are in the process of building a shower house for the cabins.
The discussion about HST yes/no needs to be finished. You can't plan with 50% less or more income.
Unknown First Nation land demand.

Q38. Any questions, comments, or concerns that you would like to share with us.
2009 Season Data - Hope we can get support for our activities with team building and leadership training
2009 Season Data - Please note that this was our first season to operate and the ranch was open for guests from 26th June to 31st October 2009.
Please see attached letters. For your information, these are our difficulties at this time. Not much hope for us to continue to operate in the future. I had filled out the survey part when we first received it, but did not send it because I realize small operators are probably an “unknown” to the Association and BC Tourism, and my response would be unappreciated. Any way, here ya have it!
Setting up a guest ranch business from scratch, I have experienced every process from beginning to end. It has proven to be costly, time consuming and at many times frustrating due to the lack of understanding and support, particularly from local government. Despite the struggle, we are now proud to be operating a professional, well-structured and organized business. What is lacking now is the recognition for what we have achieved, as have all member ranches of the BCGRA who have endured the same journey. Very few guest ranches in BC have all the necessary tenures, permits, safety programs, etc. in place and therefore by promoting all BC ranches equally we are indeed at risk of our visitors taking away with them a less positive experience of the BC guest ranch experience. I would like to see the bar raised, more ranches encouraged to meet the criteria to become BCGRA members. Ultimately giving us more member ranches, more marketing dollars and better selection of professional tourism ranch product for our visitors. If we are able to compete on a global scale with other guest ranch destinations, this integrated approach is the only way to go and in years from now the experiences of our guests will say it all. BC is the place to go if you want a ranch vacation. Thanks for all your hard work to help us achieve success!
We are finished growing and just want to survive. We are a family operation with a solid customer base; based on 58 years of service in the industry. We do not want to install showers and washrooms in order to stay away from Health department inspectors and regulations. Our customers have been coming for years and continue to bring family and friends to join them in the special place. Strong family values and hard work have built this business and sustain it today! We are basically happy, just want to work everyday for our guests and have a government that supports the industry. Tourism is a huge part of BC. We have a beautiful province and this is a viable and important industry! Just think about forestry and agriculture! It makes tourism even more important.

*Comments are verbatim except where identifiers have been censored.