

Ministry of **Tourism, Trade
and Investment**



TourismBC

Snowmobile Operators Survey 2008/2009

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- Additional thanks are extended to Scott Barsby and Amber Woods from the BCCSOA for their expertise and support throughout the entire process from questionnaire development to follow up reminder phone calls.

Executive Summary

The following are some highlights from the report:

- This presentation details the results of a survey of British Columbia snowmobile operators 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 Commercial Snowmobile Operators Association (BCCSOA) in association with the Experiences BC program.
- Survey responses were received from 13 commercial snowmobile operators and were weighted to represent the 37 identified operators in business during their 08/09 winter season. The analysis presented is based on a 35% response rate.
- Over half of all operators indicated they were involved in both selling snowmobile equipment and accessories and providing snowmobile-based activities and services. On average they had been in business for 8.5 years.
- Overall, there were estimated to be 46,182 clients who participated in snowmobile-based activities in the 08/09 winter season at one of BC's 37 snowmobile tour and/or rental businesses.
- The majority of operators represented small businesses with between one and five staff on average per month and less than 1,000 clients each during their 08/09 winter season.
- Nearly one-third of respondents indicated that more than half of their clients were repeat customers.

Executive Summary

- The majority of operators indicated that their business experienced a decline in volume compared to the previous year.
- A total of 70% of operators offered half day trips, 61% offered full day trips, and 25% offered multiple day trips. Guided backcountry, non-guided backcountry and guided frontcountry trips were the most popular type of trips.
- Backcountry powder trips was the type of service offered most often, followed by equipment rentals. Not surprisingly, these two types of services also represented the biggest revenue generators.
- Gross revenue before operating costs for these businesses collectively is estimated at over \$41 million.
- Snowmobile-related activities accounts for \$30 million of all gross revenue before operating costs.
- Nearly half of all operators reported gross annual revenues of less than \$100,000 with well over half of operators indicating the majority of their revenue went to operating costs.
- Permits, including Crown land tenures, land use agreements, and Provincial and National Park permits, represented a considerable expenditure of both money and time. Over one-third spent more than \$3,500 on permits, while 45% spent 30 days or more. Liability insurance also represented an expense, with 76% stating they spent less than \$10,000 annually.
- Operators reported that the bulk of their clients were male, with the largest age group between 35 and 44 years. They were most likely to be travelling with a group of friends. Interestingly, several operators noted that they had experienced an increase in the number of clients who were female or those travelling as couples.

Executive Summary

- The bulk of clients were tourists travelling from outside of the immediate area, with the largest group from Alberta.
- Most often, clients were staying approximately two nights in the area and were primarily motivated to participate in snowmobile-based activities.
- Nearly all operators used their own website as a means of marketing their business, and websites were most often listed as an effective marketing method.
- The largest group of operators (32%) reported spending between \$10,000 and \$15,000 on marketing and advertising, with expenditures on consumer trade shows making up the largest percent of total overall marketing budgets.
- High marketing costs were listed as a top constraint to long-term business growth, as were general government relations, and weather-related concerns.
- Overall, operators were most likely to indicate that marketing should be a top priority for the BC snowmobile industry to address and that new market development represented the most promising opportunity for growth.
- Marketing and promotion was also acknowledged to be an important area of focus to help grow a more profitable business.



Introduction

Introduction

The BC Snowmobile Tour and/or rental Operators' Business Survey was initiated through the Experiences BC program at the Ministry of Tourism, Trade and Investment.

The following report provides details of this comprehensive business survey that was distributed among British Columbia's commercial snowmobile operators. This group serves an estimated annual client base of over 45,000 persons who represent a diverse group of Canadians, Americans and snowmobile enthusiasts from around the world. Results of this survey cover the period from September 2008 to April 2009 (hereon in referred to as the 08/09 winter season).



Research Objectives

Research Objectives

The primary objectives of the study were:

- 1) To develop a more comprehensive understanding of the snowmobile tour and/or rental businesses operating in British Columbia.
- 2) To provide relevant information intended to assist the snowmobile sector in making sound product development and marketing decisions.
- 3) To gather detailed information on the characteristics of the sector, such as:
 - size of snowmobile business (based on number of clients who participated in snowmobile-based activities per year),
 - types of snowmobile trips and services offered; % of clients who purchase the various services offered,
 - staff (part-time/full-time/volunteer),
 - demographic profile of clients,
 - percentage of clients who were tourists,
 - business marketing and advertising activities,
 - average businesses gross revenues from guest ranch-based activities,
 - the percentage of gross revenues attributable to clients participating in snowmobile related activities,
 - the constraints to and opportunities for growth that business owners experience.

Research Objectives

- 4) To further develop business owners' understanding of their business versus the entire snowmobile tour and/or rental sector in BC.

The appendices provided at the end of this report include a copy of the survey instrument and verbatim open-ended comments from survey respondents.



Defining the Target Population

Defining the Target Population

Database Development

- The BC Commercial Snowmobile Operators Association (BCCSOA) is working with the Experiences BC program to further develop their tourism product. The Research, Planning and Evaluation Branch of the BC Ministry of Tourism, Trade and Investment identified that the snowmobile industry in BC could benefit from a comprehensive survey of snowmobile (tour and/or rental) businesses in British Columbia.
- The database used for this research was a compilation of a BCCSOA membership database and an existing Research, Planning and Evaluation database. The database was updated by means of internet and yellow pages searches. Through the field season, it was determined that there were 37 tour and/or rental businesses operating during the 08/09 snowmobile season.
- The location of each of the 37 businesses has been assigned to one of British Columbia's six tourism regions (Vancouver Island, Vancouver, Coast and Mountains, Kootenay Rockies, Thompson Okanagan, Cariboo Chilcotin Coast and Northern British Columbia).
- Of the 37 snowmobile tour and/or rental businesses, 14 (38%) operated in the Kootenay Rockies region, 11 (29%) in the Thompson Okanagan region, eight (22%) in the Vancouver, Coast, and Mountains region, three (8%) in the Northern British Columbia region and one (3%) in the Cariboo Chilcotin Coast region. This survey did not find any snowmobile tour and/or rental operators who operated in 08/09 in the Vancouver Island region.



Methodology

Data Collection

Data was collected by means of a mailback questionnaire sent to all companies in the combined BCCSOA and Research, Planning and Evaluation database. The dates for data collection are as follows:

- On June 19, 2009, the mailback questionnaire, with a cover letter explaining the purpose of the research and the benefits to snowmobile tour and/or rental operators, plus a business reply envelope was mailed to each (57)¹ snowmobile tour and/or rental business in BC (based on the combined databases).
- On July 15, the BCCSOA sent a reminder email to its members (14 in total) to encourage them to complete their questionnaire.
- Another copy of the mailback questionnaire (with cover letter and a business reply envelope) was sent on July 16 to those snowmobile tour and/or rentals that had not yet returned their original questionnaire.
- On September 18, a third copy of the mailback questionnaire was sent to non-participants (again with cover letter and a business reply envelope). This was followed up by reminder phone calls to non-BCCSOA members and another encouraging email from the BCCSOA to its members.

1. It was determined that 37 operating businesses met the definition used in the project.

Methodology

Data Collection continued...

- In November 2009, discussions were held at the BCCSOA Annual General Meeting with regard to the lack of survey participation of both the members and non-members. At this point it was decided to run analysis for those businesses who were operating with Crown land tenure.
- In January 2010, follow up phone calls were made to all businesses who had not yet participated. Additional mailback questionnaires were sent to those who agreed to respond to the survey.
- By February 2010, 13 completed surveys had been returned. During the data collection period, it was determined that many of the businesses who were originally mailed the survey were no longer operating.
- A total of 37 snowmobile tour and/or rental businesses were identified as operating in BC during the 08/09 season.
- With 13 returned surveys from 37 businesses, the survey was closed with a response rate of 35%. Based on information from the Integrated Land Management Bureau, 19 of the 37 businesses had Crown land tenure, and of our responding businesses, 10 of the 13 had tenure. In the interest of using as much of the available data as possible, we chose to use all 13 respondents' data in our analysis and report.

Data Collection continued...

- Responses from the 13 operators (i.e., total number of clients) were used to create a weighting system.
- Therefore, the results of this survey have been extrapolated to represent the entire population of BC snowmobile tour and/or rental businesses (both tenured and non-tenured).
- A more detailed description of the development of the weighting system follows.
- At the end of the survey, respondents 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 business; and*
 - *Suggestions about how to address the issues that will impact long-term growth in the industry.*

Methodology

Development of the weighting system

- Operators were stratified according to the number of estimated clients per year (i.e., small, 1-999 clients per year; medium 1,000-3,999; and large, 4,000 or more).
- Responses from each category of business size were aggregated to produce an average number of clients for small (198), and medium (1,880) businesses. Operators from all large businesses responded to the survey. Non-responding businesses were assigned either a value of 198 clients or 1,880 clients based on their estimated business size.
- Responding small business operators served a total of 790 clients; medium, 11,280 clients; and large, 20,950 clients. Small non-responding and responding operators served a total of 4,552; medium, 20,680; and large, 20,950 clients.
- Weights were then assigned to each strata as follows: small businesses were assigned a weight of 5.762, medium sized businesses were assigned a weight of 1.833, and large businesses were assigned a weight of 1.
- Based on the survey responses and the weighting scheme described above, it is estimated there were 46,182 clients who participated in snowmobile-based activities in the 08/09 winter season for all of BC's snowmobile tour and/or rental businesses.

Data Analysis

- All analysis was conducted using the weighting system described above.
- Only valid responses were used in the analysis of questions.
- Verbatim comments are included at the end of the presentation.



Inventory of Snowmobile Operators in BC

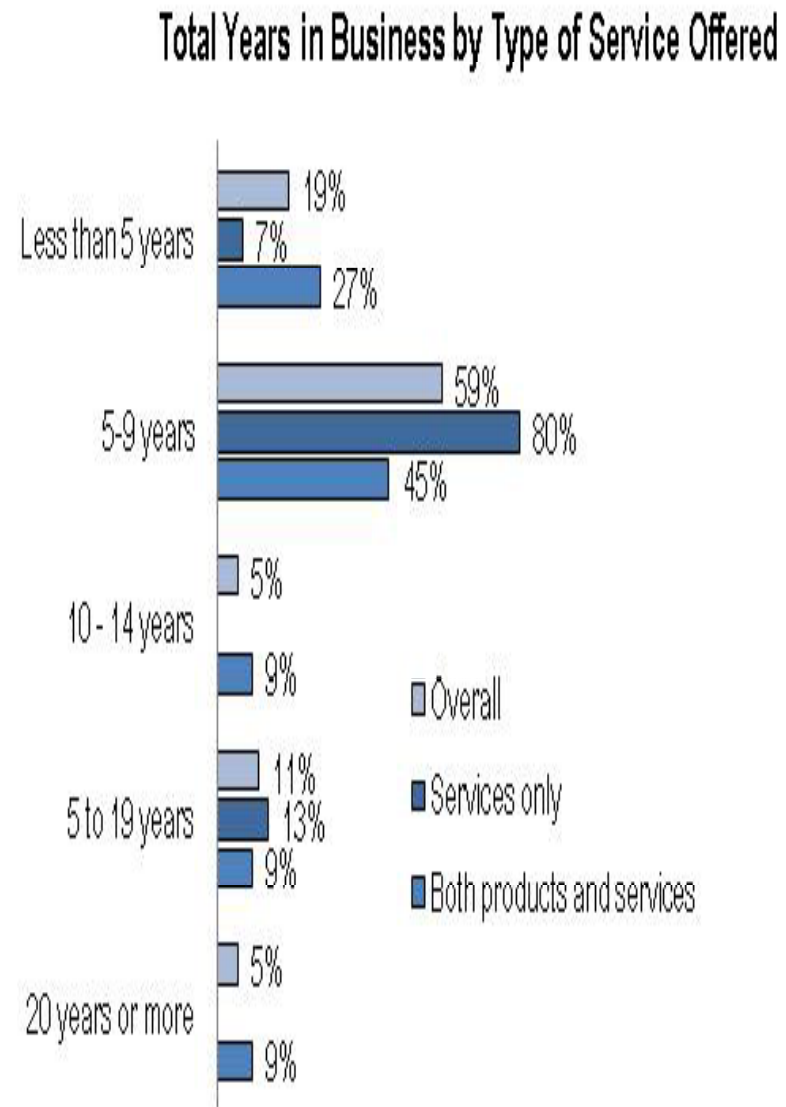
Inventory of Snowmobile Operators in BC

All snowmobile tour and/or rental businesses were asked to indicate if, in the 08/09 season, they were also involved in the sale of snowmobile product (i.e., equipment and accessories) or only provided snowmobile-based services (i.e., activities such as guided tours, training courses/lessons and/or snowmobile rentals).

- Six in 10 businesses (59.5%) offered both product and services.

Operators were also asked to indicate the total number of years their business has been offering products/services to clients participating in snowmobile-related activities/services.

- On average, businesses had been in operation for 8.5 years. The type of snowmobile tour and/or rental business by the number of years of operation is presented in the corresponding table.





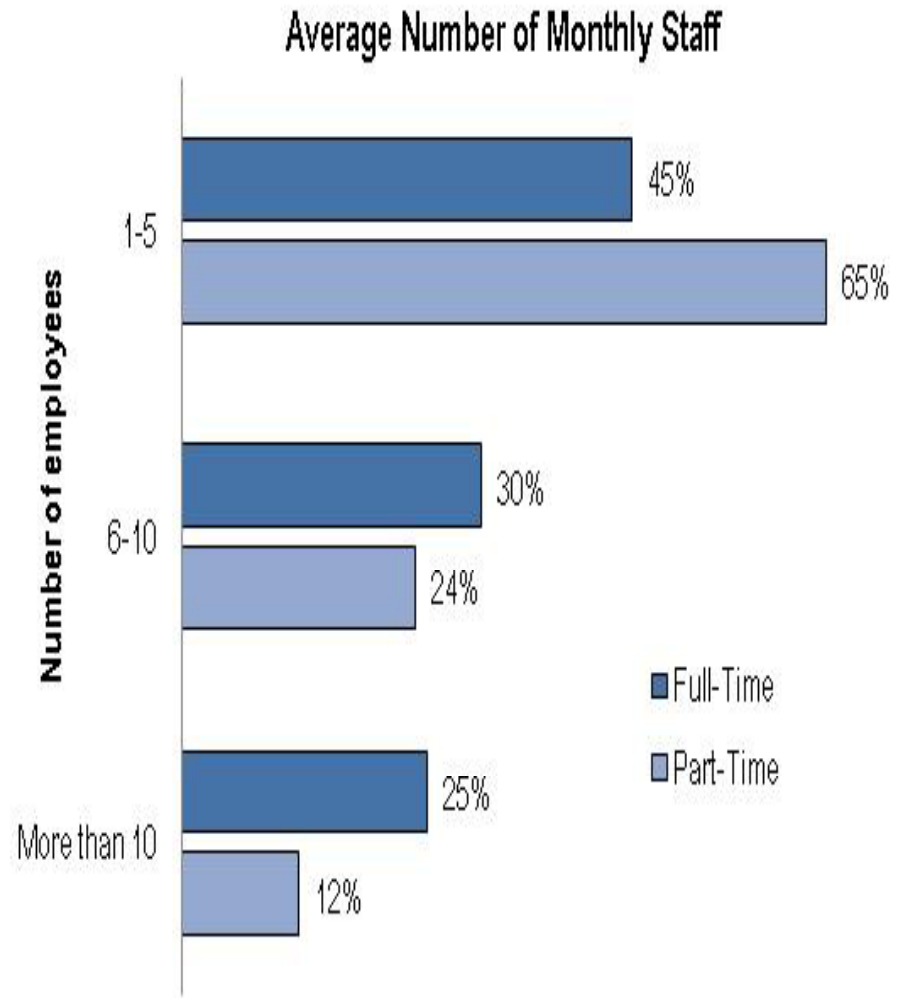
Sector Characteristics

Staffing: Average Number of Staff Per Month

Average monthly full-time, and part-time staff for all snowmobile operator businesses

- Of all respondents, the largest group employed between one and five staff monthly for the 08/09 season.
- 45% employed between one and five full-time staff on average per month.
- 65% employed between one and five part-time staff on average per month.

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 one to five employees, six to 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.



Number of Clients & Percentage of Repeat Clients

Operators were asked, approximately how many clients (total clients), participating in snowmobile-based activities, did your business serve during your 08/09 winter season, and approximately what percentage of your 08/09 winter season clients participating in snowmobile-based activities were repeat clients.

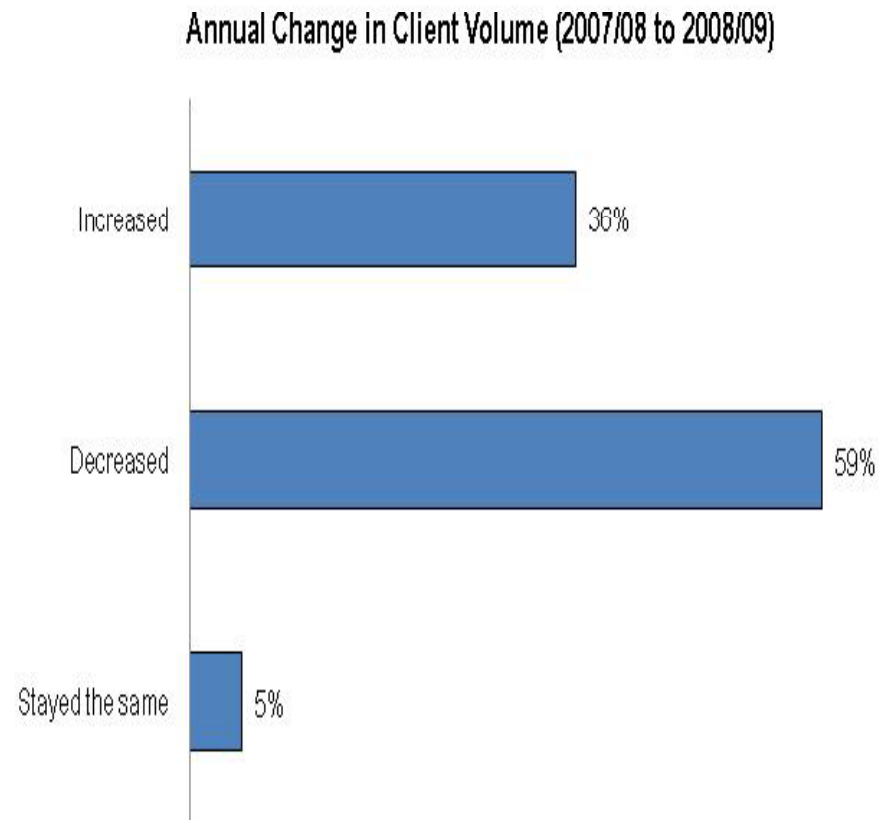
- The majority of snowmobile operators represented small operations with less than 1,000 clients who participated in snowmobile-related activities in the 08/09 winter season. Indeed, all of the 62% of respondents who reported less than 1,000 clients, reported 400 or fewer.
- During the 08/09 winter season, an estimated 46,182 clients participated in snowmobile-based activities at one of BC's 37 snowmobile tour and/or rental businesses.
- Overall, 30% of respondents indicated that more than half of their clients were repeat customers who had purchased a product or service on at least one prior occasion.

Number of Clients	
	%
Less than 1,000	62%
1,000 - 2,999	25%
3,000 - 4,999	5%
5,000 - 6,999	5%
7,000 or more	3%

Annual Change in Client Volume

Compared to your 2007/08 winter season, did the volume of your total clients who participated in snowmobile-based activities increase, decrease, or stay the same in your 08/09 winter season?

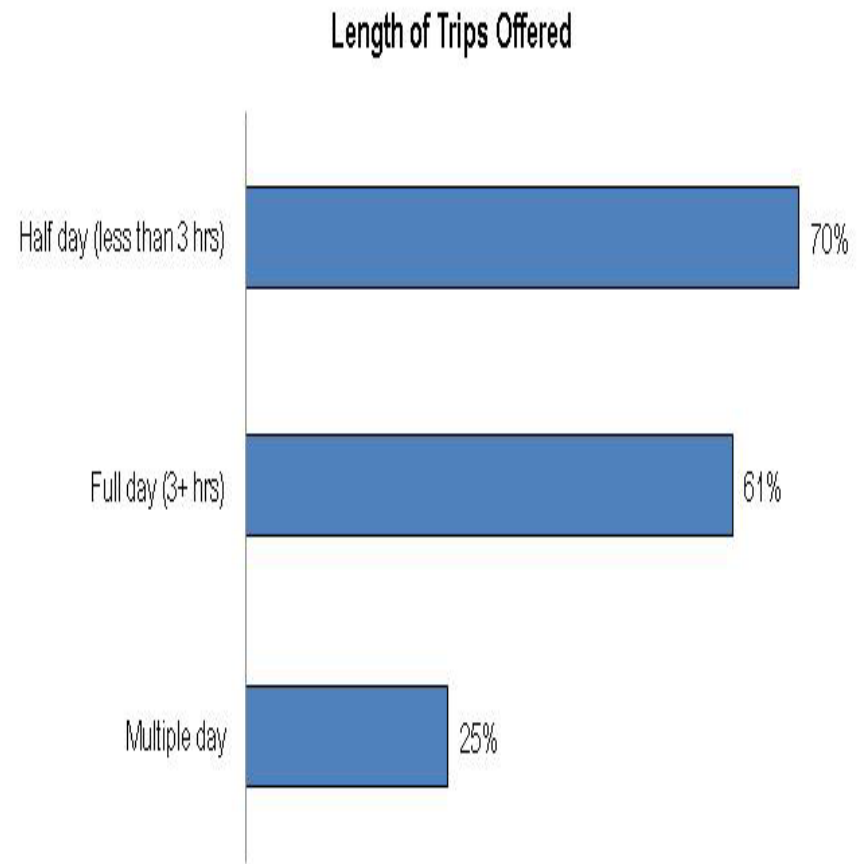
- The majority (59%) of snowmobile operators reported a *decrease* in client volume in 08/09 compared with the previous 07/08 winter season.



Length of Trips Offered

In your 08/09 winter season, what length of snowmobile trips did you offer to your clients?

- The most often cited trip duration offered by snowmobile operators was half day trips of less than three hours in duration. Overall, 70% of respondents indicated they offered these types of trips.
- A total of 61% of snowmobile operators offered full day trips that are over three hours.
- One quarter (25%) of snowmobile operators offered multiple day trips.



Note: Percentages do not add to 100% as the survey permitted more than one response.

Types of Trips Offered – Frontcountry

Operators were asked to indicate whether they offered a selection of frontcountry trips for the 08/09 season.

- All operators offered guided frontcountry trips, with the largest percentage (41%) offering full-day guided trips.
- Group tours were the second most commonly offered frontcountry trip amongst snowmobile operators, with 20% offering full-day and 20% offering half-day trips of this type.
- Other responses for this question included Snowcat tours and dogsled tours.

Type of Frontcountry Trips Offered					
	Non-guided	Guided	Interpretive scenic & wildlife trips	Group tour	Family and friends
Did not offer	13%	0%	25%	5%	10%
Half-day trips	21%	38%	10%	20%	10%
Beginner		23%	10%	20%	10%
Intermediate		13%	10%	15%	10%
Advanced		5%	8%	8%	5%
Full-day trips	30%	41%	10%	20%	8%
Beginner		15%	5%	15%	8%
Intermediate		18%	8%	13%	8%
Advanced		31%	8%	26%	18%
Multiple-day trips	25%	10%	10%	5%	5%
Beginner		5%	5%	5%	5%
Intermediate		5%	10%	5%	5%
Advanced		10%	5%	5%	0%

Note: Percentages were calculated based on total sample size.

Types of Trips Offered Backcountry

Operators were asked to indicate whether they offered a selection of backcountry trips for the 08/09 season.

- The largest percentage of operators offered guided backcountry trips followed by group tours.
- Among all operators, nearly half (46%) offered full-day guided backcountry trips, while one third (36%) offered similar half-day trips.

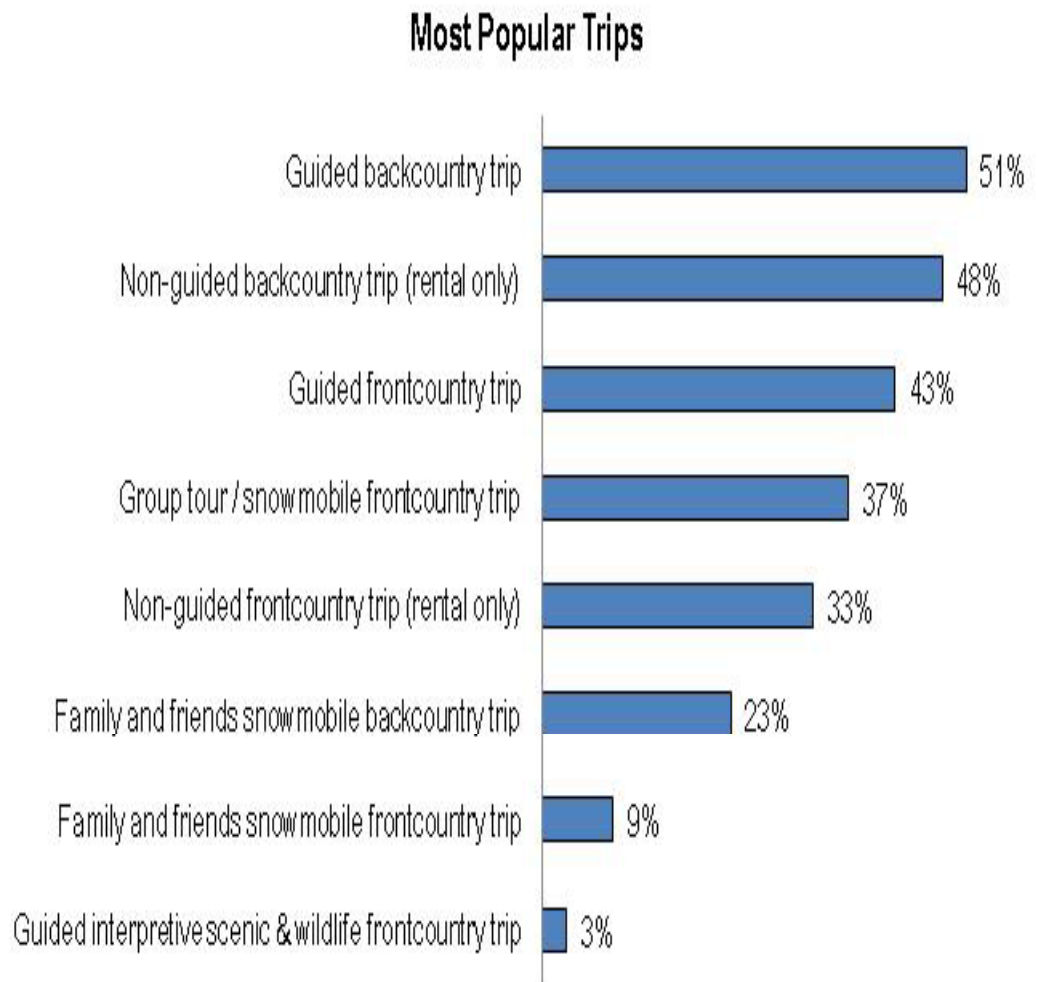
Type of Backcountry Trips Offered					
	Non-guided	Guided	Interpretive scenic & wildlife trips	Group tour	Family and friends
Did not offer	42%	16%	36%	21%	25%
Half-day trips	10%	36%	18%	26%	31%
Beginner		33%	16%	23%	28%
Intermediate		33%	16%	23%	28%
Advanced		15%	3%	10%	10%
Full-day trips	30%	46%	3%	25%	31%
Beginner		30%	0%	15%	25%
Intermediate		40%	0%	20%	25%
Advanced		41%	3%	15%	26%
Multiple-day trips	25%	25%	0%	5%	16%
Beginner		5%	0%	5%	0%
Intermediate		5%	0%	5%	0%
Advanced		25%	0%	5%	16%

Note: Percentages were calculated based on total sample size.

Trip Popularity

Operators were asked to list the top three trip types (from the complete list of front and backcountry trips above). These were compiled to represent the most popular types of trips for the 08/09 season.

- The most popular trip types included guided backcountry trips (51% selected as a top three choice), non-guided backcountry trip (rental only; 48%), and guided frontcountry trip (43%).



Types of Services Offered

Which service(s) did your snowmobile business offer in your 08/09 winter season (September 2008 through April 2009)?

- Backcountry/powder trips were a service provided by most operators; 95% of operators offered this activity to clients.
- Equipment rentals were also provided to clients by most operators; 66% of operators offered this service to clients.
- A total of 59% of operators offered frontcountry/trail trips.
- Among those providing First Nations activities, snowshoeing was cited.
- Among those who mentioned other activities, responses included ATV, hiking, dogsledding, catskiing, heliskiing, x-country, nightride BBQ, snowmobile repairs, Jeep, rafting, canoeing, jetboating, fishing, biking, trail riding, hunting, 4X4, and Hummer.

Services Offered	
	%
Backcountry/Powder trips	95%
Equipment Rentals	66%
Frontcountry/Trail trips	59%
Accommodations	35%
Meals (non-gourmet)	34%
Course instruction provider	28%
Recreational training (non-professional)	28%
Gourmet Cuisine (with trained chef)	23%
Trail passes and/or	21%
Guide training (professional)	13%
First Nations activities	10%
Other	18%

Types of Services Offered

Operators were further asked to specify the number of years they offered each service, the percentage of clients who used each service, whether they offered each service through a partner supplier, and whether the service was also offered in the off season (May 2009 through August 2009).

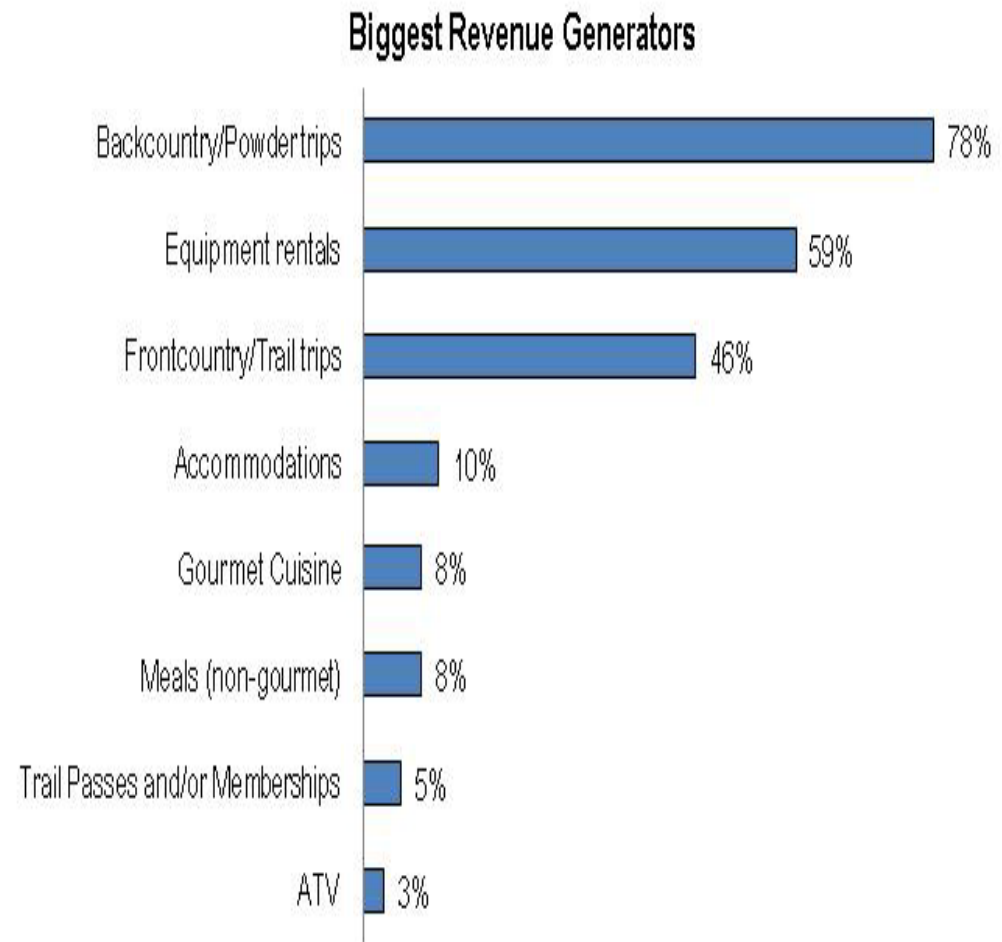
- The results of these questions have been presented in the table below. All percentages and averages are based on valid responses. For example, among operators that offer accommodations, the average length of time these services have been offered is 13.3 years, with an average of 39% of clients from these operators using this service. A total of 58% of those with accommodations, offer this service through a partner, and 28% offer accommodations from May through August.

Services Offered in 2008/09 Season					
	% Offering Service	Avg # of Yrs Offering Service	Avg % of Clients Using Service	% Offering Services Through a Partner	% Offering Services May Through August
Backcountry/Powder trips	95%	6.7	37%	10%	0%
Equipment rentals	66%	6.3	39%	7%	7%
Frontcountry/Trail trips	59%	8.6	41%	0%	0%
Accommodations	35%	13.3	39%	58%	28%
Meals (non-gourmet)	34%	10.9	34%	0%	23%
Course instruction provider	28%	2.8	1%	35%	0%
Recreational training (non-professional)	28%	5.6	13%	35%	0%
Gourmet Cuisine	23%	9.8	9%	0%	33%
Trail Passes and/or Memberships	21%	3.2	34%	24%	0%
Guide training (professional)	13%	8.1	0%	39%	21%
First Nations Activities	10%	1.0	4%	48%	0%

Top Revenue-Generating Services

Operators were asked to rank their businesses top three revenue generators from the list of services provided in the last slide.

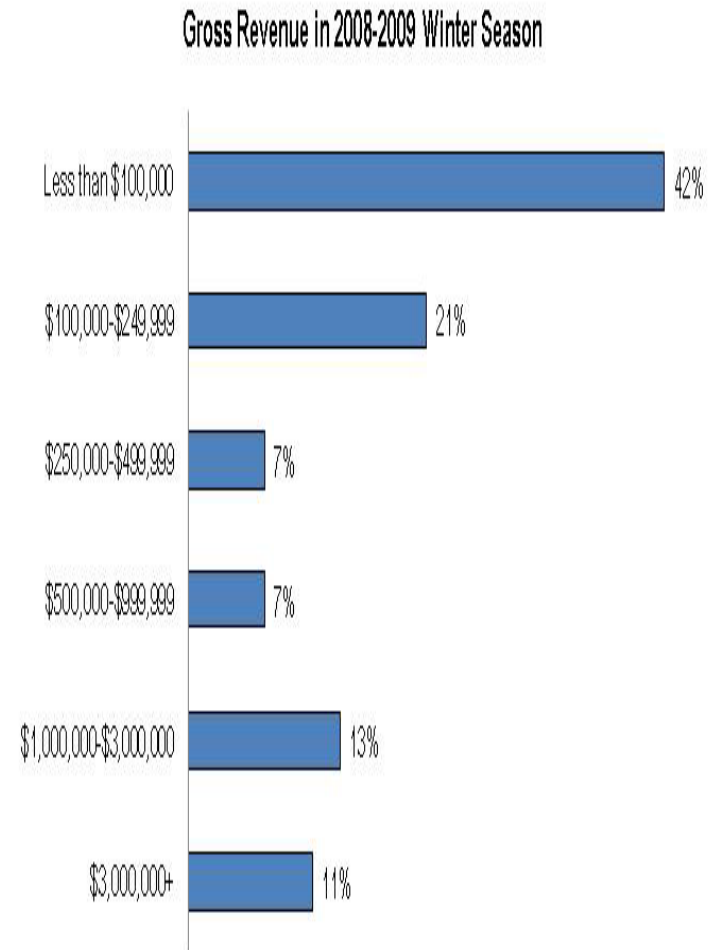
- Over three quarters (78%) reported that backcountry/powder trips (of any duration) were a top revenue generator.
- Over half (59%) mentioned equipment rentals as a top revenue generator.
- Frontcountry / trail trips were the third most frequently cited top revenue generator, with 46% stating this in their top three.



Gross Revenue

What was your 08/09 winter season gross revenue for your business?

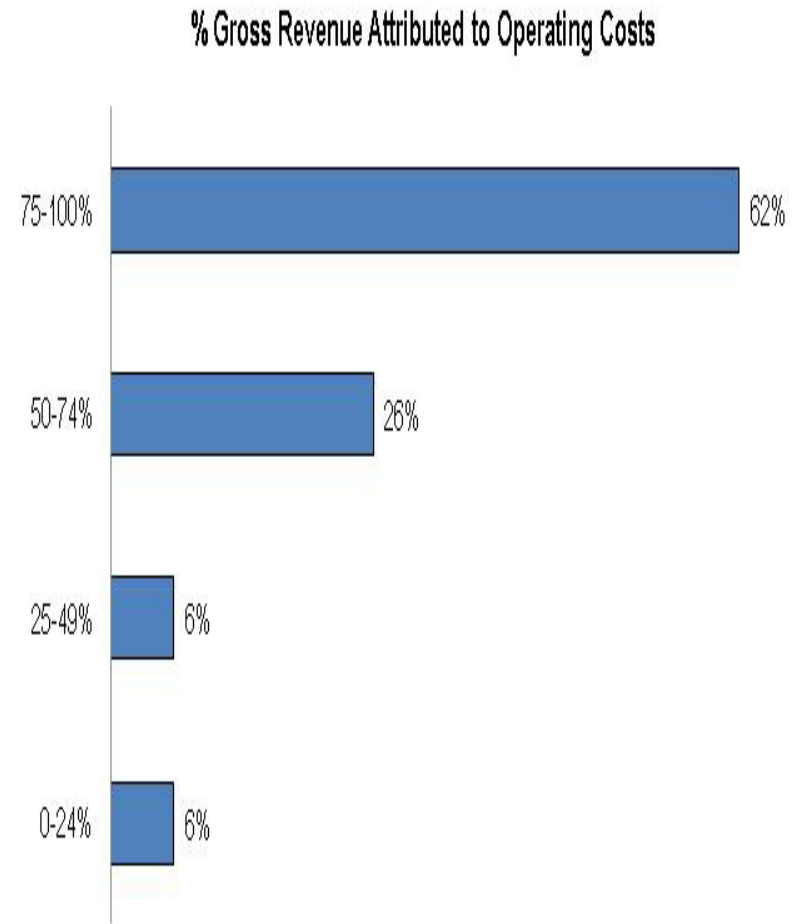
- Nearly half of all operators (42%) reported gross revenue for the 08/09 season of under \$100,000.
- Almost one quarter (24%), however, reported gross revenues over \$1,000,000.
- During the 08/09 winter season, the gross revenue for BC's 37 snowmobile tour and/or rental businesses was an estimated \$41,055,840. Of this, \$29,891,340 can be attributed to revenue from clients participating in snowmobile-related activities.
- When asked to indicate what percentage of their revenues were from clients participating in snowmobile-related activities, nearly all (89%) indicated 85% or more of their revenues were from these sources. Indeed, 84% stated that 98% or more of their revenues were from snowmobile-related activities. This includes all revenue from guided tours, courses, lessons, and rentals.



Gross Revenue Attributed to Operating Costs

In your 2008/2009 winter season, what percentage of your gross revenue can be attributed to operating costs?

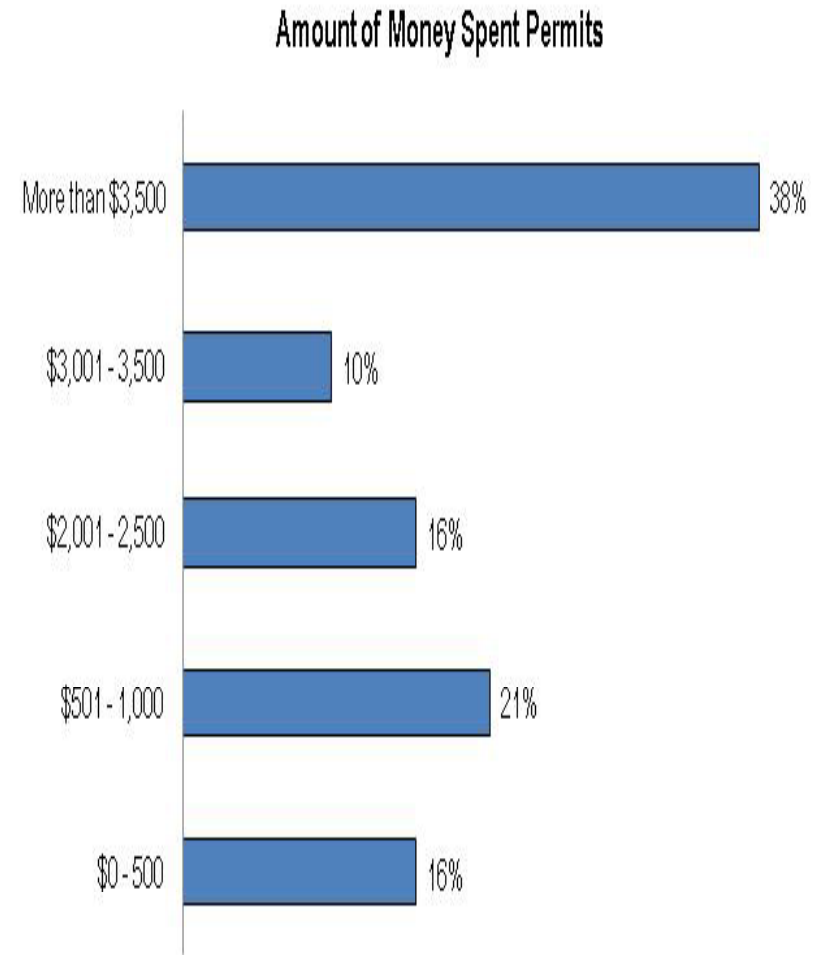
- Well over half (62%) of operators indicated that the majority of their gross revenue (i.e., 75% or more) went to operating costs.
- Only 12% indicated that less than half of their gross revenue was attributed to operating costs.



Spending on Permits

In your 08/09 winter season, approximately how much did your business personally spend on permits, including all Crown land tenures, land use agreements and provincial or national parks permits?

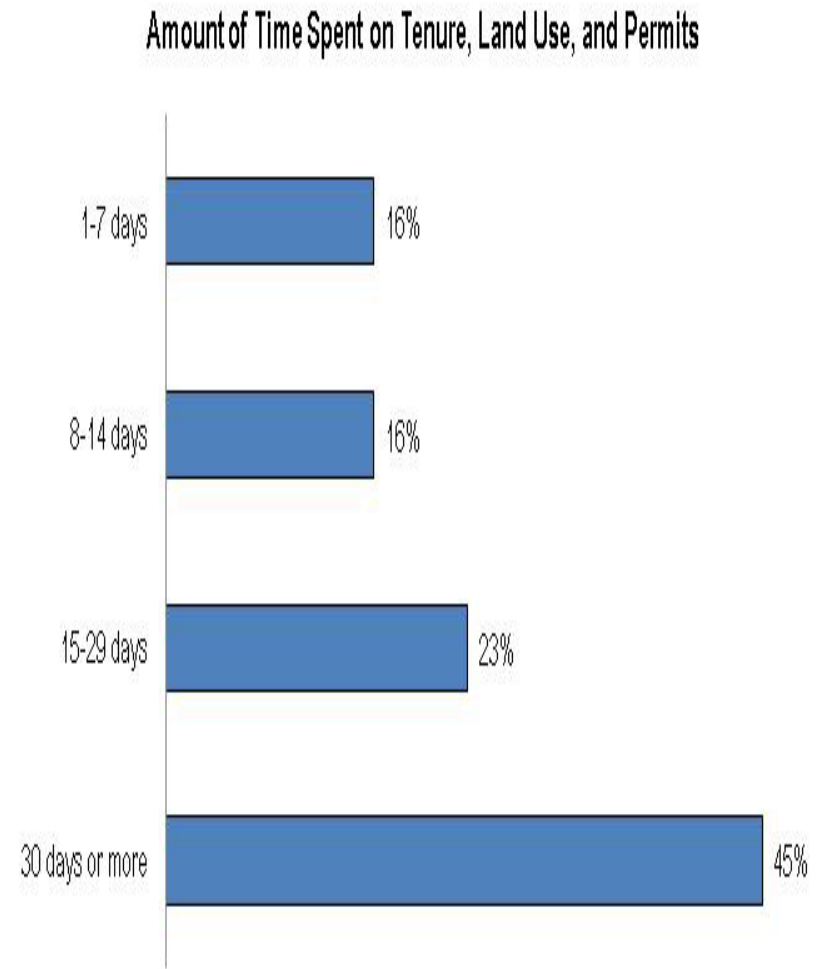
- The largest group of operators (38%) indicated they spent more than \$3,500 on permits, including all Crown land tenures, land use agreements and provincial and national park permits.
- Comparatively, 37% indicated that they spent \$1,000 or less.



Time Spent on Tenure, Land Use and Permits

In your 08/09 winter season, approximately how much time, overall, did you spend on issues related to tenure, land use, and permits?

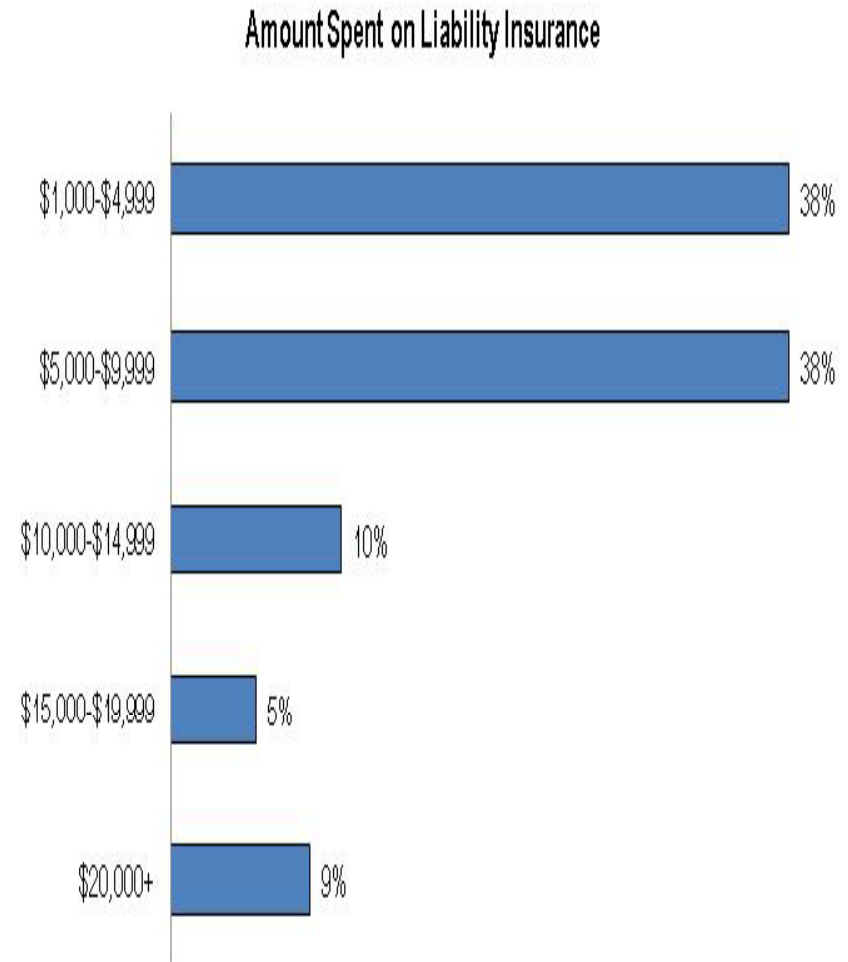
- The largest group (45%) of snowmobile operators spent more than 30 days on issues concerning tenure, land use, and permits.
- There were no snowmobile operators who reported spending no time on permits and tenure related issues. In fact, all operators reported they spent a minimum of 10 hours with a median of 21 days.



Liability Insurance

In your 2008/2009 winter season, how much did your company spend on liability insurance?

- In 08/09, a total of 76% of operators indicated they spent less than \$10,000 on liability insurance. This was equally divided, with 38% spending between \$1,000 and \$4,999, and 38% spending between \$5,000 and \$9,999.
- A total of 9% mentioned that they spent \$20,000 or more on liability insurance in 08/09.



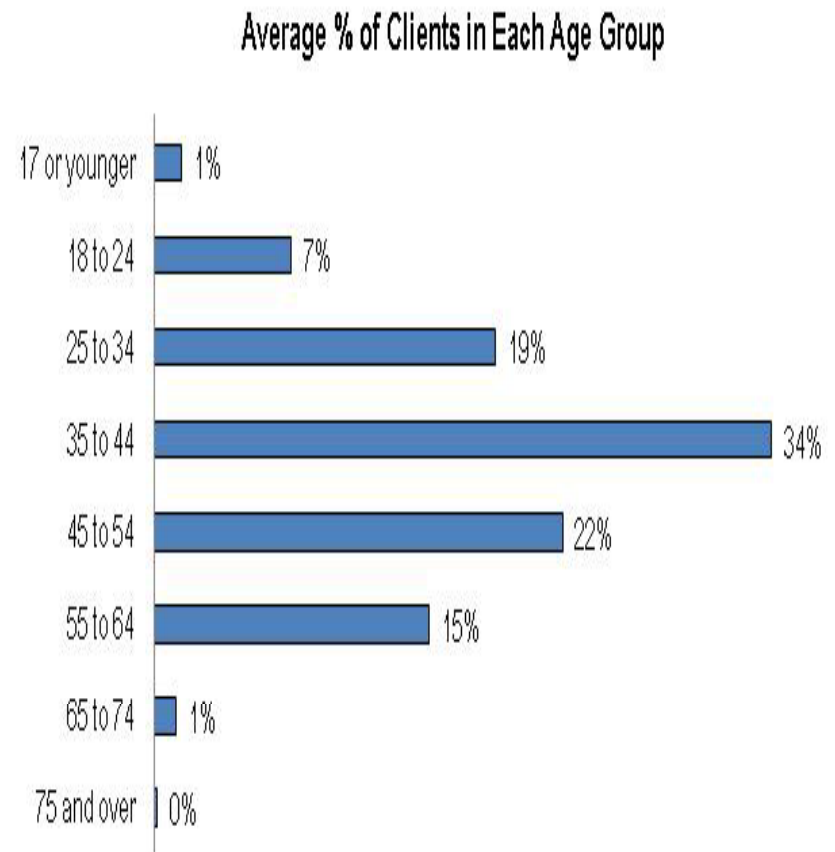


Client Characteristics

Client Profile – Gender and Age

Operators were asked to indicate the percentages of their snowmobile-based activity clients who were male and compared to female and to describe the percentages that fit in a series of age categories.

- On average, operators indicated that 81% of their clients were male with 19% female.
- Among all operators, the largest average age group of clients was 35 to 44 years. On average, operators reported that 34% of their clients were in this group.
- Operators reported an average of 22% in both the age groups from 25 to 34 and 45 to 54.
- When asked if the age distribution of their clients has changed in the past 10 years (or since opening), 61% stated that there had been no change.

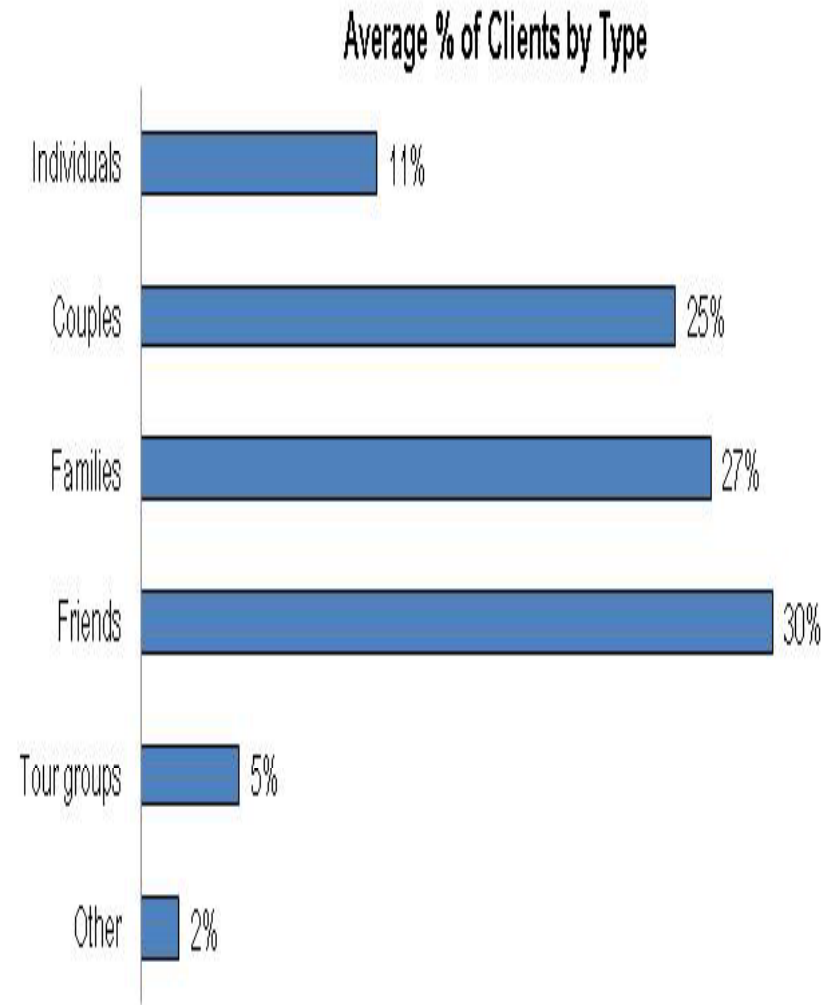


Note: Information presented for these questions represents average percentage across all valid responses for all operators.

Type of Group

Operators were asked to indicate the percentage of their snowmobile-based activity clients who were from various client types.

- On average, operators reported that the largest proportion of their clients consisted of groups of friends (30%). Individuals and tour groups comprised the smallest proportion of clients (11% and 5%, respectively).
- On average, operators indicated that 73% of their groups were male-only groups, considerably more than female-only groups (13%) and mixed groups of males and females (14%).
- Overall, just over half of operators (52%) indicated that the gender distribution of group clients had not changed in the past 10 years. Among those who indicated there was a difference, changes included increases in females, mixed groups and couples.



Client Origin

Operators were asked to indicate the percentage of their clients who were tourists and the market origins of their tourist clients.

- On average, operators reported that 89% of their clients were tourists (i.e., a client who was not a resident of the local community).
- Operators were asked to indicate the proportion of their tourist clients who were from each of several markets.
- On average, operators indicated that the largest group was from Alberta, with an average of 40% of all tourist clients. British Columbia was second of those from Canadian origins, with an average of 23% of tourist clients across all operators.
- On average, Canadian tourists represented 71%, US residents 10%, and residents from outside of Canada and the US represented 19% of tourist clients.

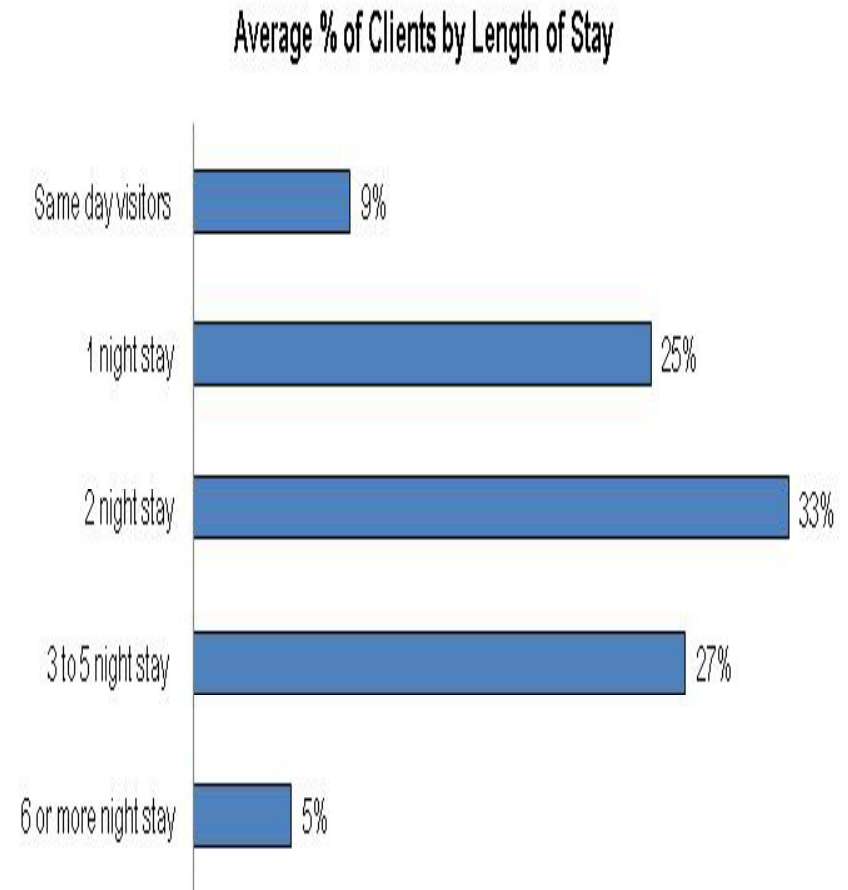
Average % of Clients by Origin	
	%
British Columbia	23%
Alberta	40%
Ontario	5%
Quebec	<1%
Other Canada	2%
Canada Total	71%
Washington	4%
Oregon	<1%
Montana	<1%
North Eastern US	2%
California	1%
Other US	3%
US Total	10%
United Kingdom	9%
Germany/Austria/Switzerland	7%
Other Europe	2%
Asia	<1%
Other International	1%
International Total	19%

Note: Other Europe was specified as Italy.

Average Stay in Area

In your 08/09 winter season, approximately how many nights did your tourist clients stay either in your community or overnight on your site (including before, during and after the snowmobile trip)?

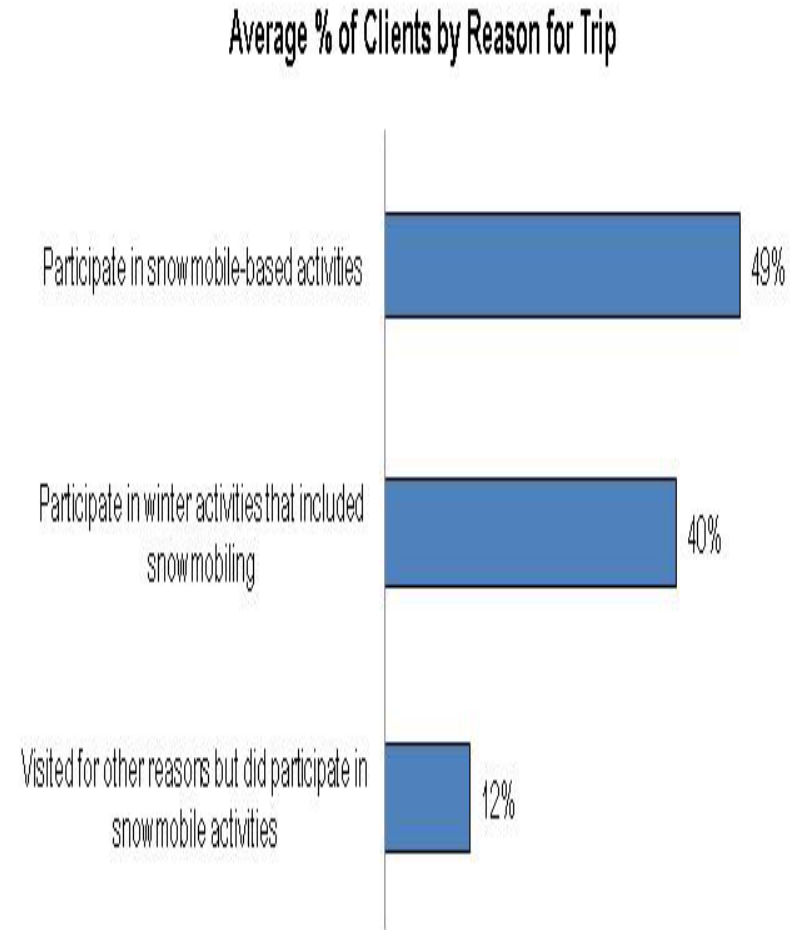
- On average, operators reported that the largest proportion of their tourist clients (33%) spent two nights either on site or in the community.
- Operators reported that just over one quarter (27%) of tourists stayed three to five nights, with 25% of tourists staying a single night.
- A much smaller proportion of tourist clients were reported to be either on a same day trip (9%) or a longer trip of six or more nights (5%).



Primary Motivation for Trip

Operators were asked to indicate the proportion of their 08/09 tourist clients who fit within specific categories related to their travel motivations and activities within the community.

- On average, operators reported that nearly half of their tourist clients (49%) visited the community mainly to participate in snowmobile-based activities.
- A slightly smaller proportion of tourist clients (40%) were said to be visiting mainly to participate in winter activities that included snowmobiling.
- Only a small proportion of clients (12%) visited for reasons other than snowmobiling activities.



Business Changes in Past 5 Years

Operators were asked to describe the changes their business has seen in its customer make-up and/or behaviour over the last five years.

Responses were varied and included:

- Business is growing. Less Americans and more European and Eastern Canadians.
- Climbed until the economy took a dive
- Countless ongoing change depending on economy and snow.
- Customer base growing, more younger people and women. Retail sales growing.
- Customer base has declined. More female customers less Asian customers.
- Customer more conscious of dollars spent, less money to spend.
- Less customers overall, only one day rentals instead of multi-day. Less retail sales.
- More advanced riding capabilities; need for more advanced terrain, untraded powder.
- More women with men. Over 40+. Not “sled heads” looking for trail riding.
- See more women, steady growth till last year. Stayed the same with some grooming of trails. The activity of snowmobiling has increased (longer stays and more riding by locals, etc.).
- Significant growth in sledding industry with more tourists out of country, women and families recently taking an interest. Increased risk of avalanche-related deaths due to increased numbers out on hill and lack of education and public awareness among sledders on the risks of backcountry sledding. Customer dissatisfaction due to impact of Sustainable Research Management Plan and snowmobile closures not providing enough terrain for volume sledders (not enough powder).
- We are seeing more winter holidays that include one day of snowmobile, one day dogsled, one ski day, one to two days shopping, etc. Lots of female packs.



Marketing & Advertising Activities

Marketing Methods Used

What marketing methods did you use in your 08/09 winter season?

- Nearly all operators (95%) stated that they used their own website as a marketing method for the 08/09 season.
- This was followed by brochures and posters (80%), magazine ads (75%) and yellow pages (66%).
- All of the operators selected at least one of the marketing methods listed, with no one selecting 'None'.
- Other Web Site(s) included Canadian Rockies.com/.net, Google Adwords, and World Web/BC Adv.
- Other association membership included BC Nature, Destination Spa Group, Tourism BC, Tourism Vancouver, local business association, etc.

Marketing Methods Used	
	%
Your Web Site	95%
Brochures, Posters	80%
Magazine Ads	75%
Yellow Pages	66%
E-mail Promotions	59%
Other Web Site(s)	56%
Consumer or Trade Shows	56%
Newspaper Ads	44%
BC Snowmobile Operators	43%
Provincial/Regional Travel	38%
Wholesale Operators	23%
Travel Agents	15%
Other Association	15%
Radio or Television Ads	13%
Direct Mail to Past Customers	13%
Travel Agency Travel Guides	13%
Public Relations	13%
BC Snowmobile Federation Membership	13%
Direct Mail to Future	10%
Film Shows, Slide Shows	10%
Other method	5%

Most Effective Marketing Methods

In 2008, what were your top three most effective marketing methods?

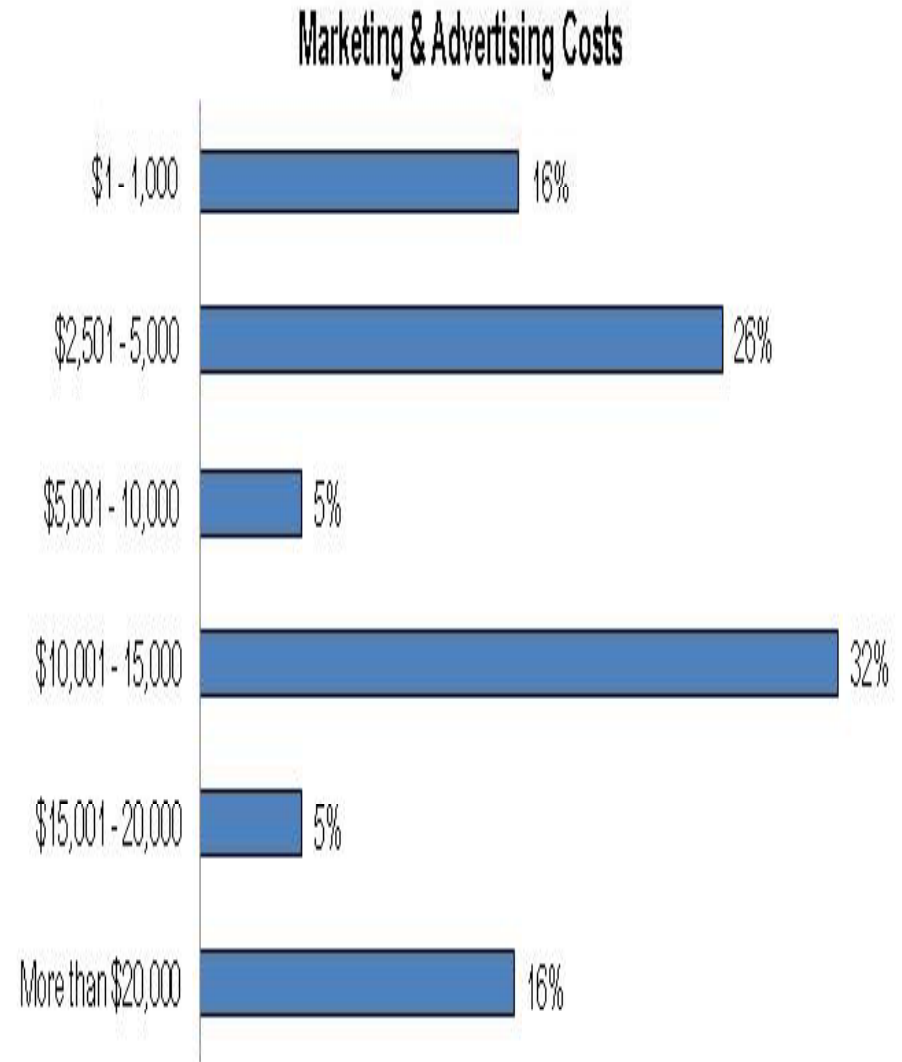
- Overall, operators selected websites as their most effective marketing method. A total of 85% indicated this was one of their top three methods.
- This was followed by brochures and posters (42% rated in the top three).
- Consumer or trade shows, email promotions and other websites were all selected in the top three by 21% of operators.

Most Effective Marketing Methods	
	%
Websites	85%
Brochures, Posters	42%
Consumer or Trade Shows	21%
E-mail Promotions	21%
Other Web Site	21%
Direct Mailing	16%
Newspaper Ads	16%
Travel Guides	16%
Word of Mouth	10%
Magazine Ads	5%
Own Web Site	5%
Partnership Program	5%
Public Relations	5%
Yellow Pages	5%
Travel Agents	3%
Wholesale Operators	3%

Expenditures for Marketing and Advertising

How much did your business spend on marketing and advertising in the 08/09 winter season?

- Overall, slightly more than half (53%) of all operators indicated that they spent more than \$10,000 on marketing and advertising in the 08/09 winter season.
- The largest group of operators (32%) spent between \$10,001 and \$15,000 on marketing and advertising.
- A total of 16% spent more than \$20,000, while an equivalent amount (16%) spent considerably less, with expenditures between \$1 and \$1,000.
- There were no operators who indicated that they didn't spend anything on marketing and advertising.

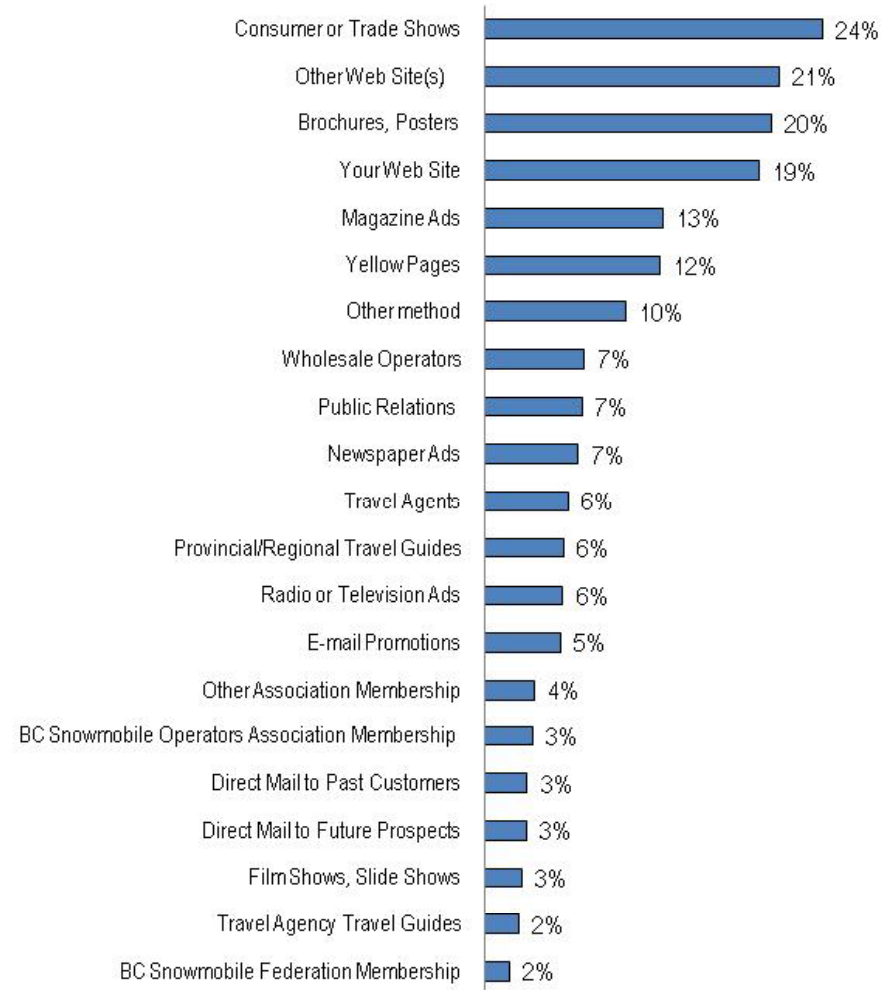


Expenditures for Marketing and Advertising

From among a list of possible marketing methods, operators were asked to indicate the proportion of their total marketing budget that was dedicated to each type.

- Expenditures on consumer trade shows represented the highest average percentage of the total marketing budget among operators who indicated they used this method. Among operators who participated in consumer trade shows, an average of 24% of their total marketing budget was dedicated to these efforts.
- This was followed by an average of 21% among those who indicated they used other websites and 20% for those who used brochures and posters.

Average % of Total Marketing Budget by Marketing Method





Constraints / Opportunities to Growth

Constraints to Growth

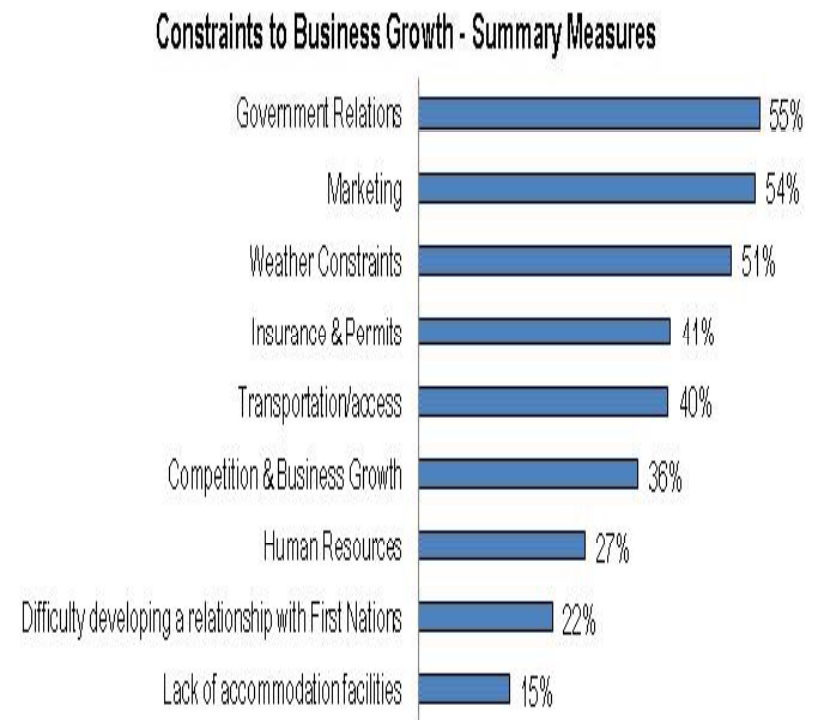
Operators were asked to indicate whether each of a list of possible constraints to long-term business growth was an issue.

- Operators were most likely to indicate that high marketing costs were a constraint to long-term business growth, with 63% indicating this was either a moderate or serious constraint.
- Lack of co-ordinated marketing efforts and too much government regulation were also more likely to be selected as constraints, with 61% (each) indicating these were either moderate or serious constraints.
- Poor quality accommodation and inadequate staff performance were least likely to be rated a moderate or serious constraint. Only 12% (each) of operators selected these items as constraints to long-term business growth.

Constraints to Business Growth	
	%
High Marketing Costs	63%
Lack of Co-ordinated Marketing	61%
Too Much Government Regulation	61%
Lack of Government Enforcement of Regulations	60%
Difficulty Securing Permits	58%
Snow Conditions	57%
Canada/USA Border Issues	49%
Lack of Government Regulation	49%
Weather Constraints	43%
Travel Safety Concerns or Hassles	43%
Difficulty Accessing Capital Dollars for Expansion	40%
Limited or Poor Air Access for Visitors	39%
Limited or Poor Ground Access for Visitors	39%
Lack of Marketing Research	39%
Finding Staff with Adequate Training	36%
Competition from Other Sports & Activities	34%
Price Competition	33%
Retaining Staff with Adequate Training	33%
Difficulty Securing Insurance	24%
Difficulty Developing a Relationship with First Nations	22%
Lack of Accommodation Facilities	18%
Inadequate Staff Performance	12%
Poor Quality Accommodation Services	12%

Constraints to Growth – Summary Measures

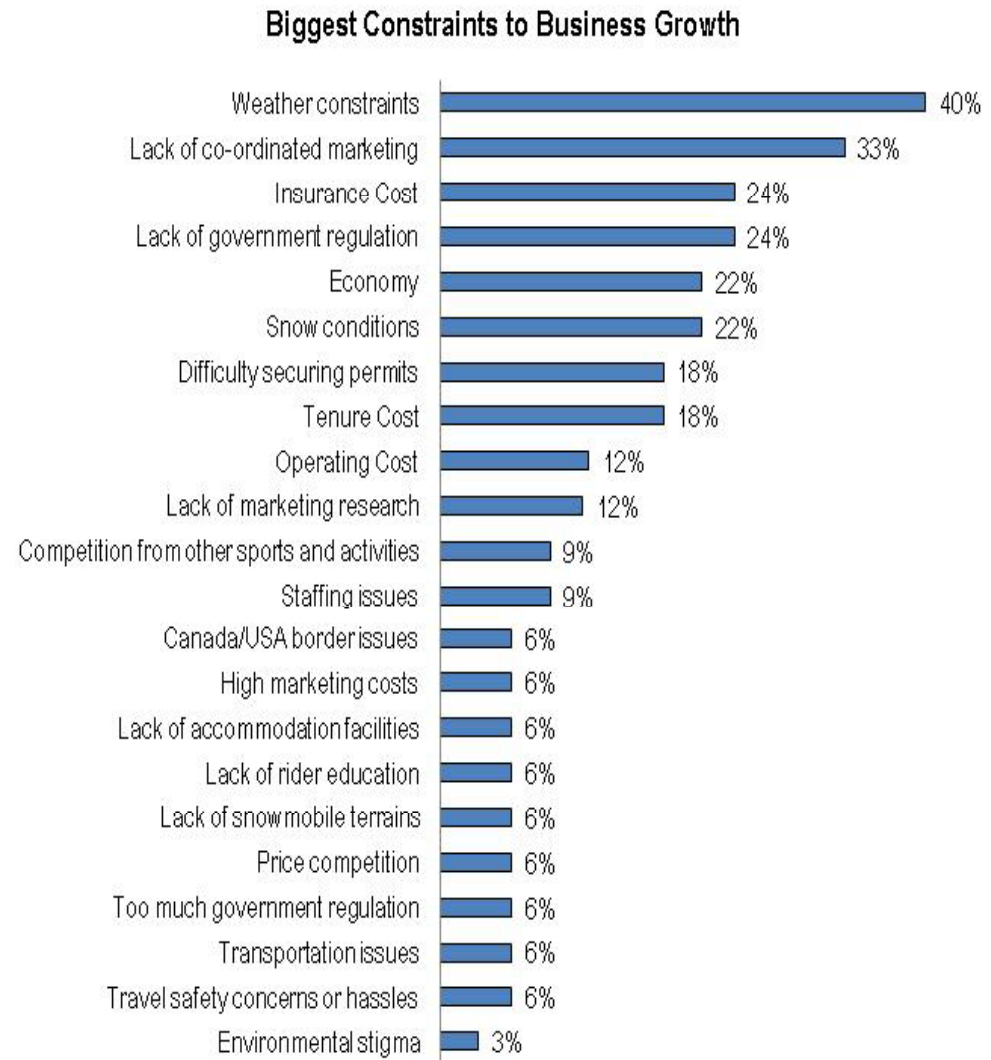
- The constraints to long-term business growth for snowmobile operators listed above were collapsed into categories for summary purposes and the proportions who rated the constraints either moderate or serious were averaged across the category.
- Overall, constraints related to government relations (including too much government regulation, lack of regulation and enforcement, and Canada/US border issues) received the highest average rating, with 55% indicating these issues were represented either a moderate or serious constraint.
- Marketing issues (high marketing costs, lack of co-ordinated marketing and lack of market research) and weather constraints (snow conditions and general weather issues) were also more likely to be rated either a moderate or serious constraint to long-term business growth.



Most Serious Constraints to Business Growth

What do you consider to be the three most serious constraints faced by your snowmobile business?

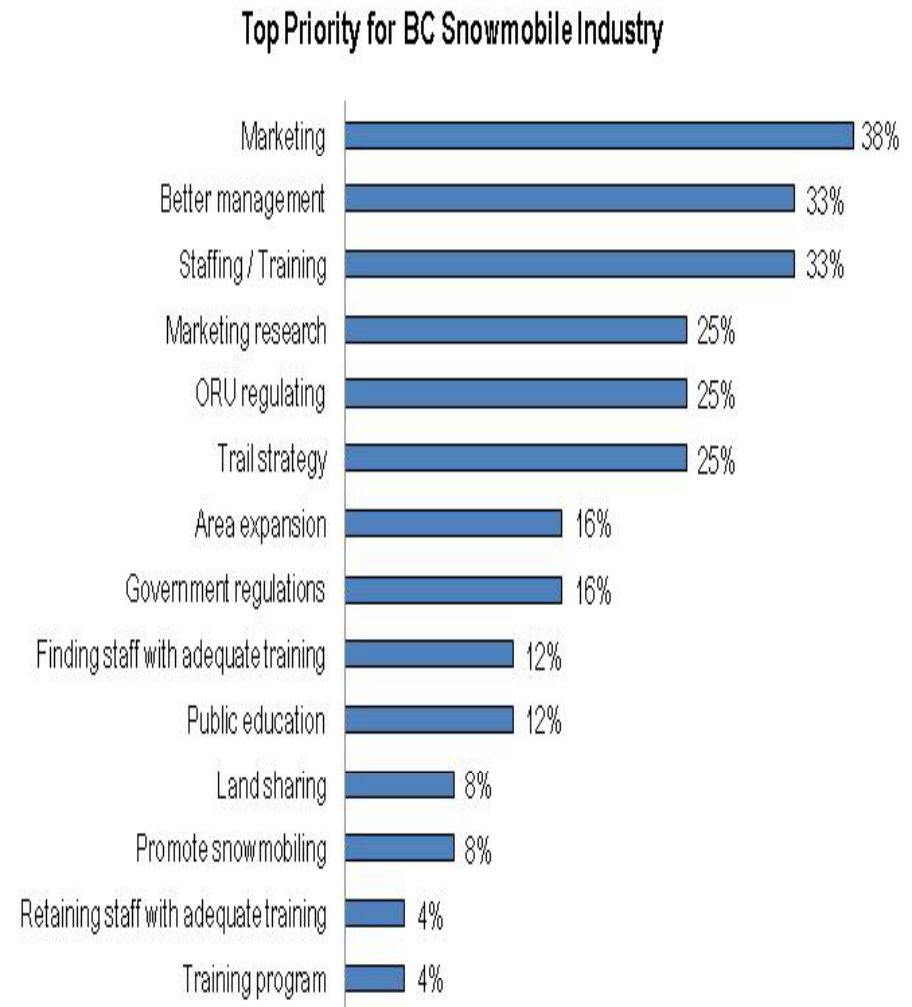
- Weather constraints was rated as the top most serious constraint by 40% of all operators.
- This was followed by a concern over a lack of co-ordinated marketing efforts, which was rated a serious constraint by 33% of operators; and insurance costs and lack of government regulation, which concerned 24% of operators (each).



Top Priorities for the BC Snowmobile Industry

Concerning the constraints to growth listed above, which do you think should be the top three priorities for the BC snowmobile industry to address?

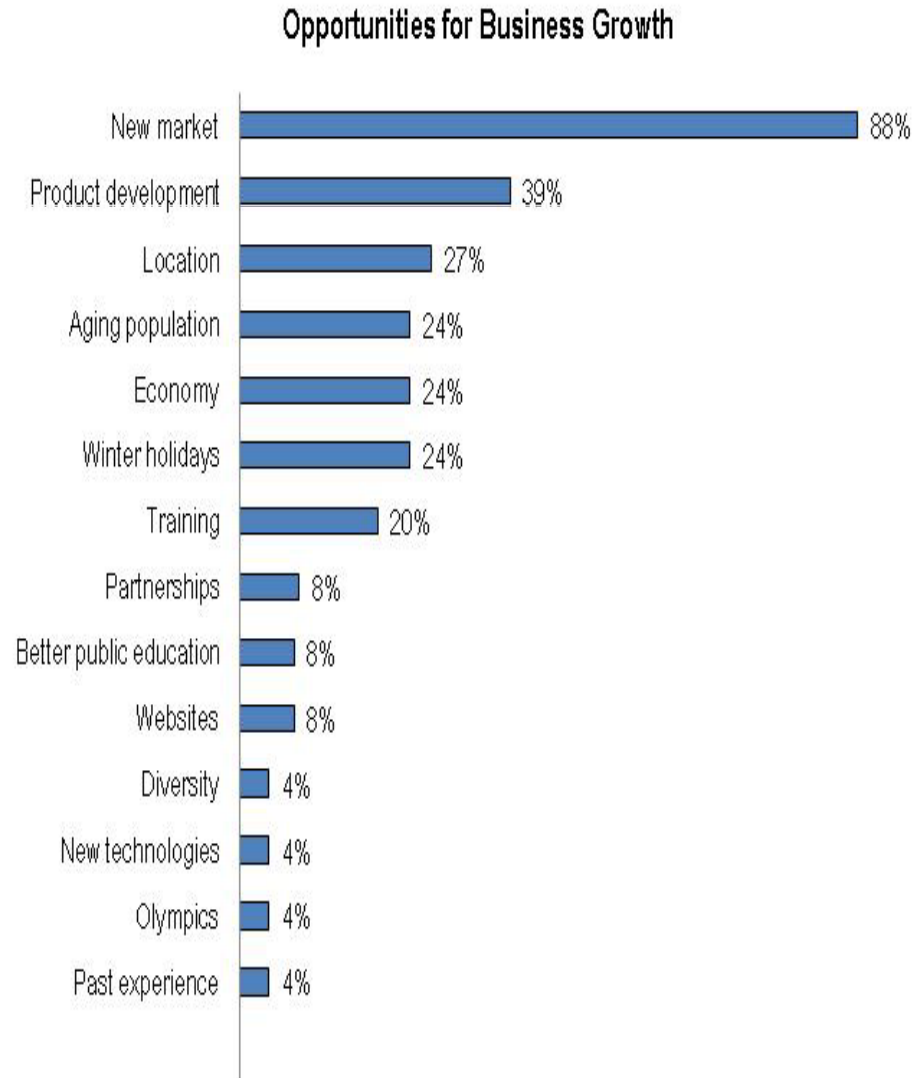
- Overall, operators were most likely to indicate that marketing should be a top priority for the BC snowmobile industry to address. A total of 38% of operators indicated this among their top three priorities.
- Better management and staffing/training were also identified as top priorities, with 33% (each) indicating these among their top three.
- Marketing research, off-road vehicle regulating and trail strategy were indicated as a top priority for 25% of operators.



Most Promising Opportunities

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

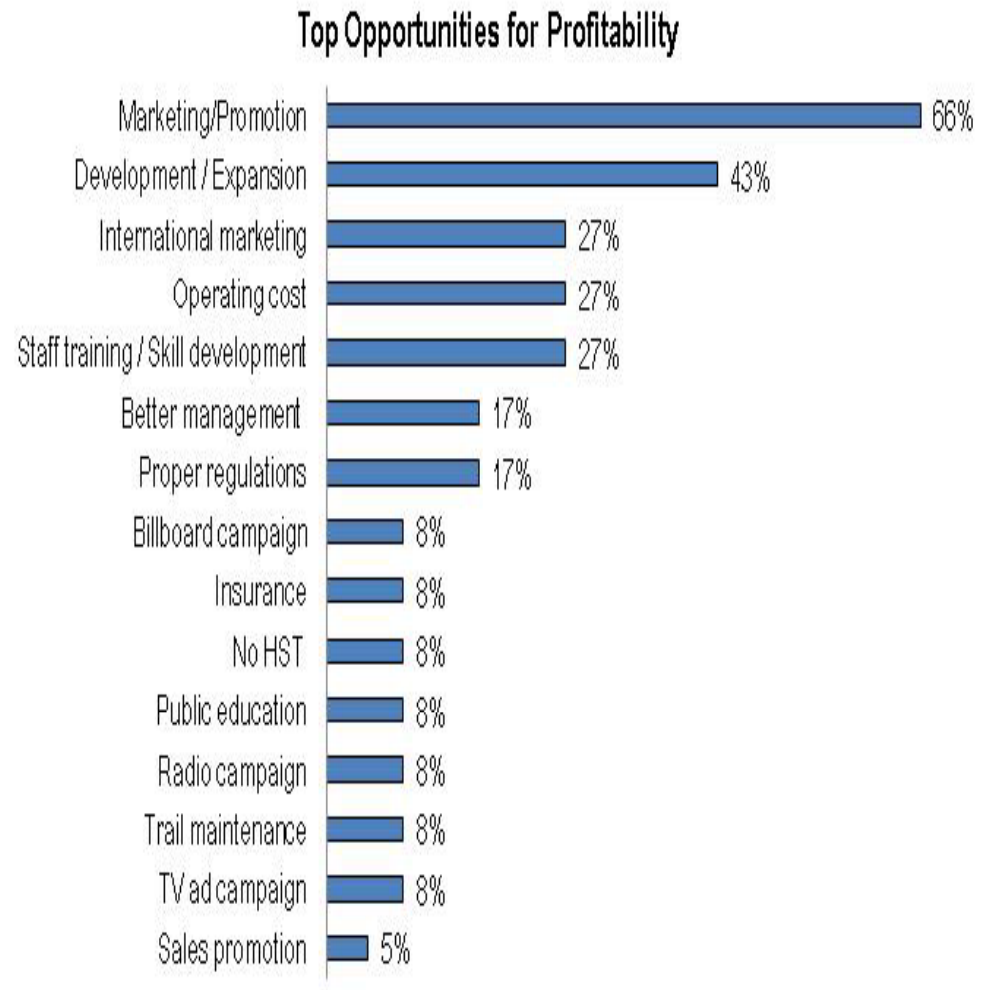
- Operators were most likely to indicate that new market development represented one of the top three most promising opportunities for their business. A total of 88% of operators mentioned new markets, including opportunities on the East Coast, the US, and Europe.
- Product development was cited by 39% of operators, including multi-day adventures, snowmobile tours, and all-in-one packages.



Opportunities for Profitability

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

- Two thirds of operators indicated that marketing and promotion efforts represented one of the top three most important things that could be done to help them grow a more profitable business.
- This was followed by development and expansion, with 43% of operators indicating this was one of their top three important things that could be done.
- International marketing, changes in operating costs and staff training and skill development were also highlighted, with 27% selecting each of these three items.




General Comments

- Excerpt from comments:

"The industry needs properly certified, educated, responsible and insured guides to continue, prosper and grow...Government and insurance providers should consider the need for industry support and funding for guiding services as very little income is derived from snowmobile guiding yet it is a necessary service. Government should understand the economic need for increased snowmobile terrain to support a healthy winter economy in [town name] and perhaps other towns. Local businesses require industry growth to survive."

**Note: See appendices for all verbatim comments*



Summary, Recommendations & Conclusions

Summary

Snowmobile Industry & Clients:

- Most snowmobile operators are small to medium sized businesses with between one and five staff members at any time throughout the season and gross revenues of under \$250,000 annually.
- They offer a mix of services, including primarily half-day and full-day guided trips. Backcountry/powder trips and equipment rentals feature prominently among revenue generating services offered.
- They serve a client base that is relatively young (35-44 years) who most often visit with friends and, to a lesser extent, family members on short trips that are most likely to be less than one week in duration.
- The majority of clients are tourists who originate from Alberta and other parts of British Columbia. There are also significant numbers of clients who originate from Europe. They are travelling primarily to engage in snowmobile-related activities. More than a quarter of snowmobile clients are repeat customers.
- Responses concerning the volume of clients in 2008 indicated a strong decrease; 59% of all operators agree that client volume has decreased in the 2008/2009 winter season compared to the 2007/2008 winter season.

Summary

Marketing & Advertising:

- Online sources (i.e., snowmobile operator's own website), brochures and posters, and magazine ads are the most commonly used tools for marketing and advertising among snowmobile operators.
- Online sources, brochures and posters, and consumer trade shows were identified by operators as the most effective ways to market their businesses to consumers.
- The largest group of operators were spending between \$10,001 and \$15,000 annually on marketing and advertising, and the high cost of marketing was identified as a constraint to long-term business growth by a majority of operators.
- Marketing and promotions were mentioned as both top opportunities for business growth and top priorities for the BC snowmobile industry to ensure ongoing profitability for operators.
- New market development, including opportunities on Canada's East Coast, in the US and in Europe, as well as new product development were identified as some of the key areas of opportunity for business growth and profitability. Respondents felt this could be supported by an integrated marketing and advertising approach.

Recommendations/Conclusions

Constraints / Opportunities:

- The high cost of marketing, dealing with issues related to land use and permits, and government regulation have been identified as constraints to snowmobile businesses.
- However, weather constraints, tenure costs, and difficulty securing permits were also specified by snowmobile operators as the most serious barriers to growth in the industry.
- Snowmobile operators want the snowmobile industry in partnership with government to prioritize decreasing prohibitive regulation and increasing co-ordinated marketing efforts with partners to capitalize on marketing and advertising
- This presents an opportunity to offer snowmobile businesses' assistance with co-ordinating marketing efforts, and possibly some financial assistance with marketing.

“...[there is] countless ongoing change depending on economy and snow...”

“...[there has been] significant growth in sledding industry with more tourists out of country, women and families recently taking an interest...”

“... We are very excited about an organized marketing campaign, internationally and regionally....”



Limitations

Limitations

There are limitations to the research findings in this report:

- The primary limitation of this research project has been small sample size and the limited scope insofar as only a single year was identified for study.
- In part, this is a factor that is tied to the small size of the industry itself. As a result of this, all results presented in this report should be interpreted with caution.
- Although every effort was made to have a complete database, there may be snowmobile tour and/or rental businesses in BC that meet the definition for this research but that we could not find.
- 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 do not include tourist spending on accommodation, food, fuel, and incidentals that may occur pre and post snowmobile trip. Additionally, the gross revenue estimates do not include indirect and induced impacts of spending by snowmobile tour and/or rental businesses.



Appendices

Appendix 1 – Questionnaire



TOURISM BRITISH COLUMBIA
CANADA



Snowmobile Business Survey

Working together to build your tourism business in British Columbia

When answering this survey, please use your 08/09 winter season
(September – April) as the reference period

If you have any questions regarding this survey, please contact:
Carol Jenkins, Research Analyst, Tourism British Columbia, (250) 356-5800, carol.jenkins@tourismbc.com

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

4024

Tourism BC is working with the snowmobile sector to help create a long term tourism plan to increase snowmobile tourism. This questionnaire is intended to gather quantifiable information on a sector where there is currently very little data. Your help in doing this is greatly appreciated.

CONFIDENTIALITY OF YOUR SURVEY RESPONSES IS GUARANTEED

Your responses are not shared with other individuals at Tourism BC or with any other government agencies. Research & Planning (Tourism BC) will not share your individual responses, period. All survey data is aggregated for the final report.

SECTION 1: YOUR SERVICES

- (1) In your 08/09 winter season (September – April), did you offer snowmobile-based activities, services and/or products to clients?

For the purpose of this questionnaire, snowmobile-based activities, services and/or products include: snowmobile rentals, snowmobile guided tours, snowmobile training courses/lessons and/or snowmobile related products for retail sales.

- ☐ Yes → **Please proceed to Question 2.**
☐ No → **End of survey → Thank you for your time → Please return this survey in the envelope provided.**

- (2) In your 08/09 winter season (September – April), did your business only offer retail sales related to snowmobiles (snowmobile equipment and accessories) and not snowmobile-based activities/services (rentals, guided tours, and/or training courses/lessons)?

- ☐ Yes, I offered only snowmobiling products for retail sales → **End of survey → Thank you for your time → Please return this survey in the envelope provided.**
☐ No, my company offered only services → **Please proceed with the rest of the questionnaire.**
☐ My company offered both products and services → **Please proceed with the rest of the questionnaire.**

- (3) How many years has your business been offering products/services to clients participating in snowmobile-related activities/services (i.e. rentals, guided tours, training courses, lessons, and/or retail sales)?

_____ NUMBER OF YEARS

- (4) In what city or town is your business based (i.e. place where you are offering your products or services)?

- (5) Did your business offer snowmobile trips in your 08/09 winter season?

- ☐ Yes → **Please proceed to Question 6.**
☐ No → **Please proceed to Question 9.**

2

Appendix 1 – Questionnaire

(6) In your 08/09 winter season, what length of snowmobile trips did you offer to your clients?

Please place a checkmark (✓) beside all that apply.

- ☐ Half-day trips (less than 3 hrs)
- ☐ Full day trips (3 hrs or more)
- ☐ Multiple day trips

(7) For each **type of trip** that you offered in the winter season 08/09, please indicate whether you offered half-day, full-day, and/or multiple day trips and circle the letter(s) that corresponds to the level at which you offered this trip (B= beginner, I= intermediate, A= advanced).

Please place a checkmark (✓) beside all that apply, and for those that you have checked, please circle the level(s) of sledding you offer.

Type of Trip Offered	Did Not Offer	Half-day Trips (less than 3 hrs)	Full-day Trips (3 hrs or more)	Multiple-day Trips (w/ or w/out accommodations provided)
Frontcountry (Trail Trips)				
A1 Non-guided (rental only)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A2 Guided trips	<input type="checkbox"/>	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A
A3 Guided interpretive scenic & wildlife trips	<input type="checkbox"/>	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A
A4 Group tour (other than family or friends) snowmobile trips	<input type="checkbox"/>	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A
A5 Family and friends snowmobile trips	<input type="checkbox"/>	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A
A6 Other: Specify: _____	<input type="checkbox"/>	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A
A7 Other: Specify: _____	<input type="checkbox"/>	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A
Backcountry (Powder Riding Trips)				
B1 Non-guided (rental only)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B2 Guided trips	<input type="checkbox"/>	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A
B3 Guided interpretive scenic & wildlife trips	<input type="checkbox"/>	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A
B4 Group tour (other than family or friends) snowmobile trips	<input type="checkbox"/>	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A
B5 Family and friends snowmobile trips	<input type="checkbox"/>	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A
B6 Other: Specify: _____	<input type="checkbox"/>	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A
B7 Other: Specify: _____	<input type="checkbox"/>	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A	<input type="checkbox"/> B I A

(8) What were your **top three trip types**? From the list of "Types of Trips" (above table) that your business offered, please select its corresponding number (to the left of the service, e.g. "A5" for family and friends frontcountry (trail) trips).

- _____ = 1st most popular type of trip
- _____ = 2nd most popular type of trip
- _____ = 3rd most popular type of trip

(9) In order to understand your business and the services you offer better, please complete the table on the following page.

- a) From the list provided, which service(s) did your snowmobile business offer in your 08/09 winter season (Sep -Apr)?
- b) How many years has your snowmobile business offered these service(s)?
- c) What percentage of your clients used this service in your 08/09 winter season?
- 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 May to August?

3

	(a)	(b)	(c)	(d)	(e)
Services Offered	Please checkmark (✓) all services your snowmobile business offered in your 08/09 winter season	How many years has your snowmobile business offered these services?	Your total may come to more than 100% as some clients will have purchased more than one service	Please checkmark (✓) all services that are offered by your business but through a partner supplier	Please checkmark (✓) all services that your business offers during May-August
1 Frontcountry/Trail trips (1/2 day, full day or multi-day)	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>
2 Backcountry/Powder trips (1/2 day, full-day or multi-day)	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>
3 Equipment rentals	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>
4 Course instruction provider	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>
5 Recreational training (non-professional)	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>
6 Guide training (professional)	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>
7 Trail Passes and/or Memberships	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>
8 Accommodations	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>
9 First Nations Activities	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>
10 Meals (non-gourmet)	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>
11 Gourmet Cuisine (with a trained chef)	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>
12 Other: _____	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>
13 Other: _____	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>
14 Other: _____	<input type="checkbox"/>	_____ yrs	_____ %	<input type="checkbox"/>	<input type="checkbox"/>

(10) From the list of services your business offers (above) and its corresponding number (i.e. 1-14), please rank your business's top three revenue generators for you in the space provided below.

- _____ = 1st biggest revenue generator
- _____ = 2nd biggest revenue generator
- _____ = 3rd biggest revenue generator

SECTION 2: YOUR CUSTOMERS (Please answer this section as best you can and use educated guesstimates if you don't keep the information in your databases.)

(11) Approximately how many clients (total clients), participating in snowmobile-based activities, did your business serve during your 08/09 winter season? Please do not include clients who only purchased retail products.

_____ **ESTIMATED NUMBER OF CLIENTS** who participated in snowmobile-based activities

(12) Approximately what percentage of your **08/09 winter season** clients participating in snowmobile-based activities were repeat clients? A repeat client has purchased your products or services on at least one previous occasion.

_____ % **REPEAT CLIENTS** participating in snowmobile-based activities

4

Appendix 1 – Questionnaire

- (13) Compared to your 07/08 winter season, did the volume of your total clients who participated in snowmobile-based activities increase, decrease, or stay the same in your 08/09 winter season?

Please check (V) one answer only.

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

- (14) Approximately what percentage of your clients, who participated in snowmobile-based activities, were male and what percentage were female in your 08/09 winter season?

_____ % Male
 _____ % Female

= **100%** of clients who participated in snowmobile-based activities

- (15) Approximately what percentage of your 08/09 winter season clients, participating in snowmobile-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	_____ % 45 to 54 years
_____ % 18 to 24 years	_____ % 55 to 64 years
_____ % 25 to 34 years	_____ % 65 to 74 years
_____ % 35 to 44 years	_____ % 75 years and over

= **100 %** of clients participating in snowmobile-based activities

- (16) Has the age distribution of your clients, participating in snowmobile-based activities, changed in the last 10 years (or since opening, if operating for less than 10 years)? Please check (V) one answer only.

- ☐ Yes (Please briefly explain below)
☐ No

- (17) Thinking about your clients from your 08/09 winter season, approximately what percentage who participated in snowmobile-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)
 _____ % Friends
 _____ % Tour Group
 _____ % Other _____

= **100 %** of clients who participated in snowmobile-based activities

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- (18) The following question has been developed to determine the number of male only groups and female only groups you provided snowmobile-related services to in your 08/09 winter season. For the purpose of this question, a group is any grouping of same-sex people (who came to snowmobile together) of more than 1 person.

Approximately what percentage of your 08/09 winter season groups, who participated in snowmobile-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
 _____ % Unisex (both male & female)

= **100 %** of your groups who participated in snowmobile-based activities

- (19) Have the percentage(s) which you provided above, changed in the last 10 years, and if so how?

- ☐ Yes (Please briefly explain below)
☐ No

SECTION 3: YOUR OUT-OF-TOWN CUSTOMERS (Please answer this section as best you can and use educated guesstimates if you don't keep the information in your databases.)

- (20) In your 08/09 winter season, approximately what percentage of your clients who participated in snowmobile based activities were tourists? A tourist is defined as someone who is not a resident of your community.

_____ % of clients who were **TOURISTS**

- (21) Please indicate what percentage of your **08/09 winter season** tourist 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
_____ % Quebec	_____ % United Kingdom
_____ % Other Canada	_____ % Germany/Austria/Switzerland
_____ % Washington	_____ % Other Europe
_____ % Oregon	_____ % Asia
_____ % Montana	_____ % Other _____

= **100% TOTAL**

- (22) In your 08/09 winter season, approximately how many nights did your tourist clients stay either in your community or overnight on your site (including before, during and after the snowmobile trip)?

Please express this number, to the best of your ability, as a percentage of your total clients who were tourists and mark zero percent (0%) if there were no tourist clients in a particular group.

_____ % who were same day visitors
 _____ % who stayed 1 night
 _____ % who stayed 2 nights
 _____ % who stayed 3-5 nights
 _____ % who stayed 6+ nights

= **100 % TOTAL**

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Appendix 1 – Questionnaire

(23) What percentage of your 08/09 winter season tourist clients fit within each of the categories below?

- _____ % of **tourist** clients who visited your community mainly to participate in snowmobile-based activities
- _____ % of **tourist** clients who visited your community mainly to participate in winter activities that included snowmobiling
- _____ % of **tourist** clients who visited your community for other reasons but did participate in snowmobile activities
- = **100 %** who were **tourists**

(24) Please describe in the area provided below the changes your business has seen in its customer make-up and/or behaviour over the last five years.

For example, is your customer base growing, stagnant, or in decline? Are you seeing more women in the activity?

SECTION 4: YOUR STAFF

(25) 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?	How many full-time paid staff did you employ in each month listed below?	How many part-time paid staff did you employ in each month listed below?	How many volunteer staff did you employ in each month listed below?
<i>Please checkmark all that apply (✓)</i>	<i>Fill in the number of full-time staff you had in each month. Full-time staff worked 30 hours or more per week.</i>	<i>Fill in the number of part-time staff you had in each month. Part-time staff worked less than 30 hours per week.</i>	<i>Fill in the number of volunteer staff you had in each month.</i>
# of full-time staff per month	# of part-time staff per month	# of volunteer staff per month	
2008			
January <input type="checkbox"/>	_____	_____	_____
February <input type="checkbox"/>	_____	_____	_____
March <input type="checkbox"/>	_____	_____	_____
April <input type="checkbox"/>	_____	_____	_____
May <input type="checkbox"/>	_____	_____	_____
June <input type="checkbox"/>	_____	_____	_____
July <input type="checkbox"/>	_____	_____	_____
August <input type="checkbox"/>	_____	_____	_____
September <input type="checkbox"/>	_____	_____	_____
October <input type="checkbox"/>	_____	_____	_____
November <input type="checkbox"/>	_____	_____	_____
December <input type="checkbox"/>	_____	_____	_____
2009			
January <input type="checkbox"/>	_____	_____	_____
February <input type="checkbox"/>	_____	_____	_____
March <input type="checkbox"/>	_____	_____	_____
April <input type="checkbox"/>	_____	_____	_____

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SECTION 5: YOUR MARKETING & ADVERTISING ACTIVITIES

(26) Please fill in the table below.

- a) What marketing methods did you use in your 08/09 winter season?
- b) For each marketing method selected, fill in the appropriate percentages in COLUMN (b). The total should equal 100.

	(a)	(b)
Marketing Methods	08/09 Season Methods (✓) (If "none", check none at bottom of table)	% of Total Marketing Budget
Brochures, Posters	<input type="checkbox"/>	_____ %
Consumer or Trade Shows	<input type="checkbox"/>	_____ %
Travel Agents	<input type="checkbox"/>	_____ %
Wholesale Operators	<input type="checkbox"/>	_____ %
Direct Mail to Future Prospects	<input type="checkbox"/>	_____ %
Direct Mail to Past Customers	<input type="checkbox"/>	_____ %
E-mail Promotions	<input type="checkbox"/>	_____ %
Film Shows, Slide Shows	<input type="checkbox"/>	_____ %
Newspaper Ads	<input type="checkbox"/>	_____ %
Your Web Site	<input type="checkbox"/>	_____ %
Other Web Site(s)	<input type="checkbox"/>	_____ %
Provincial/Regional Travel Guides	<input type="checkbox"/>	_____ %
Travel Agency Travel Guides	<input type="checkbox"/>	_____ %
Radio or Television Ads	<input type="checkbox"/>	_____ %
Magazine Ads	<input type="checkbox"/>	_____ %
Public Relations	<input type="checkbox"/>	_____ %
Yellow Pages	<input type="checkbox"/>	_____ %
BC Snowmobile Operators Association Membership	<input type="checkbox"/>	_____ %
BC Snowmobile Federation Membership	<input type="checkbox"/>	_____ %
Other Association Membership (please specify which one): _____	<input type="checkbox"/>	_____ %
Other: _____	<input type="checkbox"/>	_____ %
None	<input type="checkbox"/>	N/A
TOTAL		= 100 %

(27) In 2008, what were your top-three (3) most effective marketing methods?

1. _____
2. _____
3. _____

(28) How much did your business spend on marketing and advertising in your 08/09 winter season?

Please check (✓) one answer only.

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

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Appendix 1 – Questionnaire

SECTION 6: CONSTRAINTS/OPPORTUNITIES FOR GROWTH

(29) 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 (v) in the box "N/A".

Constraints	Not a Constraint	Slight Constraint	Moderate Constraint	Serious Constraint	N/A
Transportation					
Limited or poor air access for visitors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited or poor ground access for visitors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travel safety concerns or hassles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Growth					
High marketing costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of marketing research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Difficulty accessing capital dollars for expansion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of co-ordinated marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Difficulty securing permits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Difficulty securing insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Difficulty developing a good working relationship with First Nations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price competition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of accommodation facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor quality accommodation services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competition from other sports and activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Government Regulations					
Too much government regulation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of government regulation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of government enforcement of regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canada/USA border issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Human Resources					
Finding staff with adequate training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retaining staff with adequate training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inadequate staff performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weather					
Snow conditions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weather constraints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other					
Please Specify _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(30) What do you consider to be the three (3) most serious constraints faced by your snowmobile business?

1. _____
2. _____
3. _____

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(31) Thinking of the most serious constraints you listed in Question 29 on the previous page, do you have any suggestions about how to address the issues that will impact your business's long-term growth?

(32) Thinking of all of the constraints from Question 29 on the previous page, which ones do you think should be the top three priorities for the BC Snowmobile industry to address?

1. _____
2. _____
3. _____

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

1. _____
2. _____
3. _____

(34) What do you feel are the three (3) most important things that could be done by your business, the government, and/or various BC snowmobile associations, to help you grow a more profitable business?

1. _____
2. _____
3. _____

SECTION 7: BUSINESS SPENDING & REVENUE

(35) In your 08/09 winter season, approximately how much did your business personally spend on permits, including all crown land tenures, land use agreements and Provincial or National Parks' permits?

(Please check (v) one answer only)

- | | |
|---|--|
| <input type="checkbox"/> \$ 0 – 500 | <input type="checkbox"/> \$ 2,001 – 2,500 |
| <input type="checkbox"/> \$ 501 – 1,000 | <input type="checkbox"/> \$2,501 – 3,000 |
| <input type="checkbox"/> \$ 1,001 – 1,500 | <input type="checkbox"/> \$3,001 – 3,500 |
| <input type="checkbox"/> \$ 1,501 – 2,000 | <input type="checkbox"/> More than \$3,500 |

(36) In your 08/09 winter season, 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 your 08/09 winter season |
| _____ # of TOTAL DAYS (8 hours in a day) in your 08/09 winter season |
| _____ # of TOTAL WEEKS (7 days in a week) in your 08/09 winter season |

(37) In your 08/09 winter season, how much did your company spend on liability insurance?

\$ _____ = COST OF LIABILITY INSURANCE

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Appendix 1 – Questionnaire

(38) What was your 08/09 winter season gross revenue for your business?

\$_____08/09 WINTER SEASON GROSS REVENUE

(39) Approximately what percentage of your 08/09 winter season gross revenue came from clients or guests who participated in snowmobile-related activities? *Please include all revenue from guided tours, courses, lessons, and rentals*

_____ % of 08/09 WINTER SEASON GROSS REVENUE from clients participating snowmobile-related activities

(40) In your 08/09 winter season, what percentage of your gross revenue can be attributed to operating costs?

_____ % OPERATING COSTS from total 08/09 WINTER SEASON GROSS REVENUE

(41) Do you have any questions, comments, or concerns that you would like to share with us?

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Thank you very much for your participation!

Your responses will be an important start in measuring the size and economic impact of the commercial snowmobiling sector in British Columbia, thus ensuring that the sector's importance is recognized and it has a strong voice in the province.

Attached is a questionnaire from [Propel/Go2](#) about your interest in creating and having your guides certified through an accreditation program. Please take a couple of minutes to complete and return it along with this survey in the enclosed business-reply envelope.

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Appendix 2 – Open Ended Questions

Q16. How has the age distribution of your clients changed since opening?

Aging demographic, only ride a few time a year now.

Have started seeing more guys under 34 more recently likely related to work and income available through oil field, etc. Alberta economy.

Mixture of families, lady groups, men groups. Equal.

More younger people participating.

Mostly families

Originally looked for 25 to 34 singles, moved to couples, higher end clients (45 to 54).

Q19. How has the distribution of gender changed in the last 10 years?

Female increased and unisex increased.

Increase in female snowmobilers.

Increased female clients.

More couples

More females participating in multi-day trips.

Never used to get any wives coming on trips or families.

Appendix 2 – Open Ended Questions

Q24. Describe the changes your business has seen in its customer make-up and/or behaviour over the last five years.

Business is growing. Less Americans and more European and Eastern Canadians.

Climbed until the economy took a dive

Countless of ongoing change depending on economy and snow.

Customer base growing, more younger people and women. Retail sales growing.

Customer base has declined. More female customers less Asian customers.

Customer more conscious of dollars spent, less money to spend.

Less customers overall, only 1-day rentals instead of multi-day. Less retail sales.

More advanced riding capabilities; need for more advanced terrain, untraded powder

More women with men. Over 40+. Not "sled heads" looking for trail riding.

See more women, steady growth till last year. Stayed the same with some grooming of trails. The activity of snowmobiling has increased (longer stays and more riding by locals, etc).

Significant growth in sledding industry with more tourists out of country, women and families recently taking an interest. Increased risk of avalanche related deaths due to increased numbers out on hill and lack of education and public awareness among sledders on the risks of backcountry sledding. Customer dissatisfaction due to impact of SRMP and snowmobile closures not providing enough terrain for volume sledders (not enough powder).

We are seeing more winter holidays that include 1 day of snowmobile, 1 day dogsled, 1 ski day, 1-2 days shopping, etc. Lots of female packs.

*Comments are verbatim except where identifiers have been censored.

Appendix 2 – Open Ended Questions

Q31. Suggestions about how to address the issues that will impact your business's long-term growth.

(1) Industry standards, we're working on it, but e.g. too expensive avi courses by CAA and not enough courses. (2) Government should enforce the ILMB rules and shut illegals down as big price consequences. (3) Transportation = road & air into interior BC.

(Grooming program) Land sharing with all uses very, very important.

Education of the sport, regulating 4 stroke sleds for tourism sport.

Implement trail strategy. Implement ORU regulations, see coalition recommendations. Do not depend on "volunteers" to maintain/market winter products.

Let's ride campaign. Promote get out doors "experience", get off couch, etc.

Marketing effort to explain the newer, lower emissions snowmobile technology.

More BC wide advertising for the whole area by larger organizations.

Open Horsey Creek and Small River for snowmobiling. Educate public that riders need to take avalanche courses or hire guides. Provide funding to better manage snowmobile areas. Provide permits to develop snowmobile areas/parking/trails, etc.

Order more snow & sun. Get some people, i.e. government that know what they are doing.

Appendix 2 – Open Ended Questions

Q41. Any questions, comments, or concerns that you would like to share with us.

No HST

Stewardships of trails/riding areas must be considered. Volunteers have burned out. Local riders interests (clubs/BCSF) often conflict with business interest/tourism development. Good work! Thanks for the opportunity.

Thank you, [company name], [town name], BC

The industry needs properly certified, educated, responsible and insured guides to continue, prosper and grow. However, there is very little demand for guiding services among snowmobilers. The industry survives is almost entirely supported by public recreation. There are many towns and businesses that rely upon this income. Our own resort business would not survive without the sledding industry. Government and insurance providers should consider the need for industry support and funding for guiding services as very little income is derived from snowmobile guiding yet it is a necessary service. Government should understand the economic need for increased snowmobile terrain to support a healthy winter economy in [town name] and perhaps other towns. Local businesses require industry growth to survive. Local areas cannot support current volume of sledders. Many sledders are going elsewhere to find better snow conditions as our areas are overused.

We are very excited about an organized marketing campaign, internationally and regionally.