TOURISM BRITISH COLUMBIA
CANADA

RESEARCH SERVICES

BRITISH COLUMBIA'S RIVER OUTFITTERS (2005)

March 2007

In cooperation with:

BC River Outfitters Association

Wilderness Tourism Association

Research Services, Tourism British Columbia

EXECUTIVE SUMMARY

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Tourism British Columbia (Tourism BC), in partnership with the British Columbia River Outfitters Association (BCROA), sought to develop a more comprehensive understanding of the river outfitting sector operating in British Columbia. Consequently, a survey was undertaken of all river outfitting businesses operating in British Columbia in 2006.

The 2006 survey of river outfitting businesses identified 59 businesses offering river-related activities within the province of British Columbia. For the purpose of this research, river outfitting products and services were defined as those products and services offered by commercial river-based businesses and included fresh water kayaking, snorkelling, rafting, jet boating, guide training, and safety training.

The majority of businesses had been in business for five or more years, with the average business in operation for 14.8 years. The majority of businesses were relatively small, employing, on average, 5.5 full-time staff and 1.6 part-time staff in 2005. However, river outfitting businesses provided products and services to almost 216,000 customers in 2005. Overall, the gross revenues of the river outfitting sector operating in British Columbia were approximately $15 million in 2005.

River outfitting businesses can be found in all six of Tourism BC's tourism regions (see Figure 1). Additionally, a few companies, headquartered in Alberta, Yukon Territory, and Alaska, operate in British Columbia. River outfitting businesses run tours on 62 rivers and creeks in British Columbia providing various types of river-related activities, such as scenic and wildlife trips, family float trips, white water trips, river float trips and jet boat trips, such trips being offered for half-day, full day and multi-day duration. In 2005, family river trips were the most commonly offered trips for 87.0% of businesses. River trips were the number one revenue generator for virtually every river outfitting company in 2005.

The river outfitting sector draws most of its clients from the domestic markets of British Columbia and Alberta. Internationally, the sector has a strong presence in the United Kingdom, and the combined markets of Germany, Austria and Switzerland. The clientele is fairly evenly divided between males and females. The average client is from British Columbia, between the ages of 25 and 54 years of age and usually travels as part of a couple, a family or with friends (rather than alone or as part of a tour group). Businesses reported that most of their river outfitting clients stayed one night in the local community and almost one third of their clientele travelled to the community specifically to participate in river-related activities. Approximately three quarters of all clients in 2005 were classified as tourists (for the purposes of this research, a tourist was defined as "someone who is not a resident of your community").

All businesses reported that they allotted a percentage of their budgets to marketing and advertising in 2005. The average river outfitting business spent an estimated $14,000 on marketing in 2005. The most commonly employed marketing methods in 2005 for all businesses were brochures and or posters, individual business web sites and wholesale operations. Businesses reported that the most effective avenues for marketing and advertising were brochures and posters, followed by the business' own website, and word of mouth.

Although the majority of businesses stated that too much government regulation was the number one issue constraining the long-term growth of their businesses, the majority of businesses stated that so too was the lack of government enforcement of regulations. Businesses defined the type of government regulations that were constraining their businesses as being related to the time and effort required to complete the paperwork, such as licenses, tenures and permits, and also the costs associated with obtaining same. At the same time, businesses would like to see government streamline and clarify policies, tenures, and licensing. Many river outfitting businesses would also like to see government more closely regulate safety and monitor operators who may not be meeting such standards.

Businesses also indicated that they were constrained, to varying degrees (slight, moderate, or serious), by their inability to find and retain staff with adequate training and that the growth of their businesses was further constrained by the high costs associated with marketing.

Many businesses see opportunities for river outfitting in the future. For example, some businesses see opportunity in further developing their own business, either through the purchase of land or the development of new and or more diversified product offerings. While a few businesses also stated that they see opportunities in the upcoming 2010 Olympic and Paralympic Winter Games, others recognize opportunities in the natural beauty of British Columbia, including its clean water and the growing interest of clients in nature-based tourism and adventure tourism opportunities.

Thanks

This research could not have occurred without the support of the British Columbia River Outfitting Association executive and members, as well as all of the businesses who willingly and freely supplied information regarding the operation of their river outfitting businesses. Thanks are also extended to the continued support of the Wilderness Tourism Association and the Council of Tourism Associations.

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1.0 INTRODUCTION

Since the latter part of the 20th century, the growing interest in adventure-based activities has led to an increase in the number of consumers travelling for the purpose of participating in adventure-based activities. Today, adventure-based tourism is defined as tourism that takes place in unusual, remote or wilderness areas, involves unconventional forms of transportation, and is associated with high and or low levels of physical activity and risk[1].

In 2005, 22.8 million tourists spent $9.7 billion dollars in British Columbia, many of whom participated in activities taking place in British Columbia's natural environment. British Columbia offers countless opportunities for individuals to participate in adventure-based activities, while at the same time enjoying the natural splendour of British Columbia's diverse landscape. Many businesses, such as river outfitters, provide opportunities for consumers and tourists to participate in adventure-based activities taking place on the scenic rivers and creeks of British Columbia.

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

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

2005. Finally, it was expected that this research would provide valuable information for the operators of river outfitting businesses in British Columbia.

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

2.0 METHODOLOGY

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

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

2.1 Defining the target population

For the purposes of this research, the river outfitting sector was defined as commercial river-based businesses offering services and products to clients and or tourists engaging in river-related activities in the province of British Columbia. Such services and products comprising fresh water kayaking, snorkelling, rafting, jet boating, guide training, and safety training. This study examined the provision of river-based services and products in British Columbia, and consequently businesses providing only retail sales were not included in this research.

2.2 Database development

The database used for this research was a compilation of a BCROA 2005/2006 membership database and an existing Research Services' database. The database was updated by means of internet and yellow pages searches. The final database contained contact information, such as company name, contact name, email address, website address, mailing address, and phone and fax numbers.

2.3 Data Collection

Data was collected by means of a mail back questionnaire sent to all companies in the combined BCROA and Research Services' database. The mail back questionnaire sought to develop a more comprehensive understanding of river outfitting businesses operating in British Columbia (Appendix A). Businesses were asked to respond to the questions using the calendar year of 2005 as a timeframe for most questions, although some questions related to changes from 2004 to 2005, or an accumulation of the years 2003, 2004, and 2005. Please see Appendix B for more specific details regarding the data collection process.

2.4 Inventory of river outfitting businesses operating in British Columbia

As of October 2006, there were approximately 59 river outfitting companies offering river-related activities in British Columbia. Of the 59 companies, eight had head offices outside of British Columbia (Alberta = 5; Alaska = 1; Yukon Territory = 2). The location of all known businesses, with head offices in British Columbia, have been assigned to one of Tourism British Columbia's six tourism regions (Vancouver Island, Cariboo Chilcotin Coast, Vancouver, Coast and Mountains, Kootenay Rockies, Thompson Okanagan, Northern British Columbia), (see Figure 1).

Of the 51 companies headquartered in British Columbia, seven (13.7%) companies were headquartered in the Northern British Columbia tourism region, five (9.8%) were in Cariboo Chilcotin Coast, two (3.9%) were on Vancouver Island, four (7.8%) were headquartered in the Thompson Okanagan tourism region, 16 (31.4%) were located in the Vancouver, Coast, and Mountains tourism region, and 17 (33.3%) were located in the Kootenay Rockies.

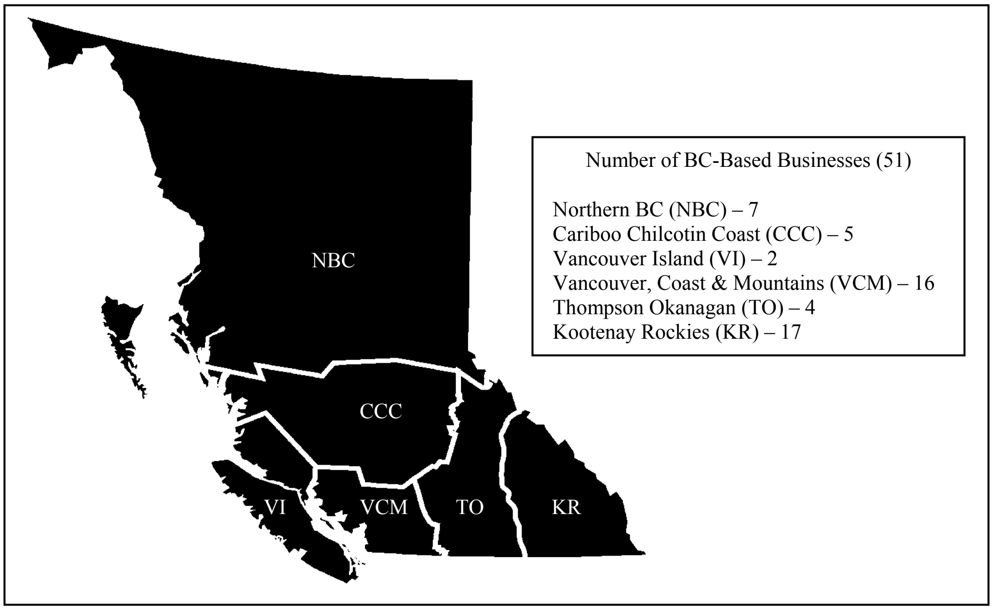


Figure 1. Number of businesses with head offices in Tourism BC's tourism regions

2.5 Data analysis

The collected data from all completed surveys was entered and analysed using the computer software program known as Statistical Package for the Social Sciences (SPSS)[2]. The data has been weighted based upon the known population of river outfitting businesses operating in British Columbia and the survey response rates. For the purposes of reporting, the collected data was aggregated.

All stated percentages are valid percentages, unless otherwise stated[3]. It is important to recognize the possibility of response error in the reporting of percentages by respondents (to questions requiring a response in percentages), as the reported percentages are likely to represent approximations and best estimates as opposed to actual figures (see Section 5.0 Limitations). All reported dollar values are in Canadian dollars.

[2] Data were not tested statistically for significance due to the small sample size for non-member respondents. Pragmatic differences exceeding 10.0% are highlighted within the body of the report.

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

3.0 RESULTS

3.1 Sector characteristics

3.1.1 Type of River Outfitting Business and Years in Business

Respondents were asked if their company offered strictly river-based services or whether their company offered river-based products and services (products were defined as retail sales; services were defined as rentals, outfitting, guided tours, training courses, and lessons). Overall, 63.6% of businesses reported that they offered services only, while 36.4% of businesses reported that they offered both products and services (Figure 2).

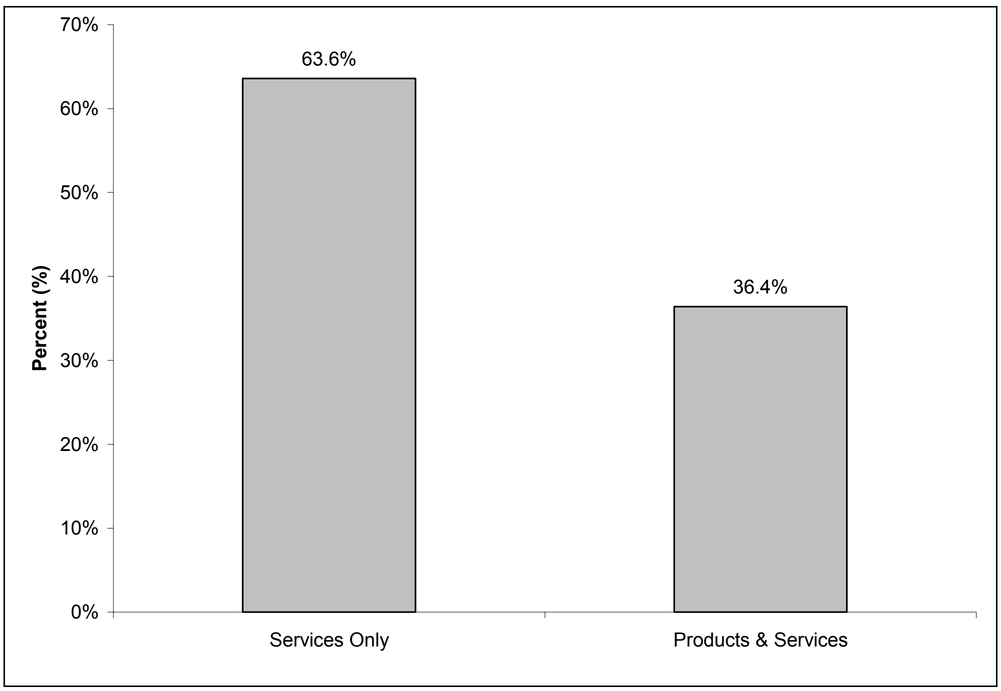


Figure 2. Percentage of businesses offering services only or products & services

As highlighted in Figure 3, the majority of businesses have been in business for more than five years. In fact, over two thirds of businesses (65.5%) have been in business for more than ten years, while 29.3% of businesses have been in business for more than 20 years. Respondents indicated that, on average, they had been providing products and or services to clients for 14.8 years (Figure 3).

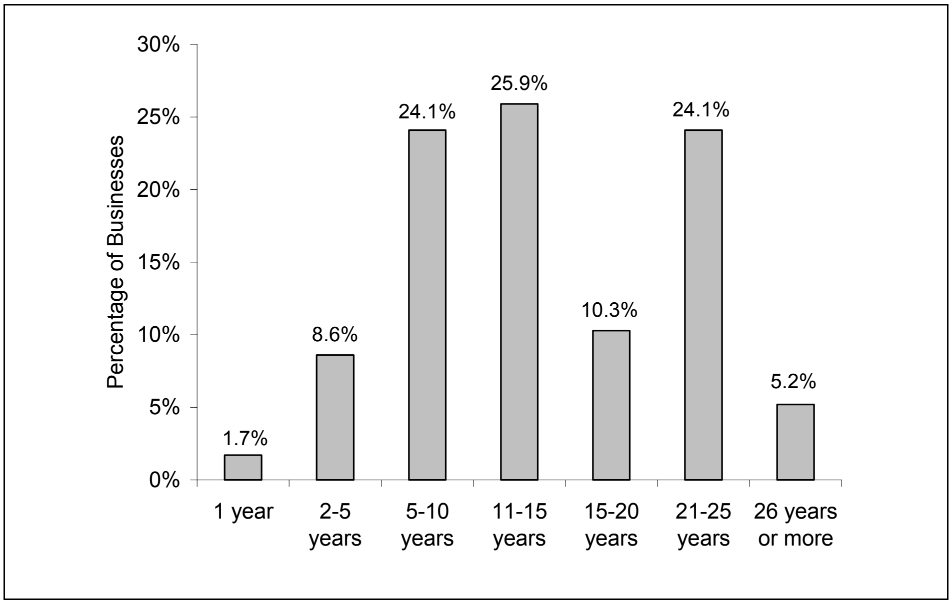


Figure 3. Average number of years in business

3.1.2 Staffing

Respondents were asked to indicate the number of full-time and the number of part-time staff in each month of 2005. Full-time staff was defined as employees who worked 30 or more hours per week in 2005, while part-time staff was defined as those employees who worked less than 30 hours per week in 2005. Analysis of staffing levels shows clear seasonality, with the months of May, June, July, August, and September showing the highest staffing levels (full time and part time), for all businesses (Figure 4). Overall, businesses employ more full-time staff than part-time staff, with the average business employing 5.5 full time and 1.6 part-time employees in 2005.

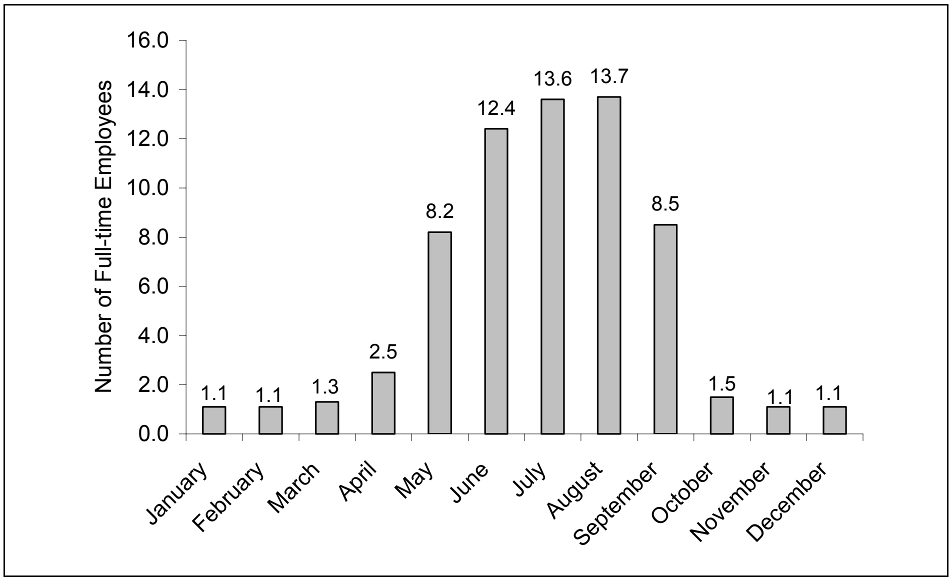


Figure 4. Full-time staffing levels in 2005

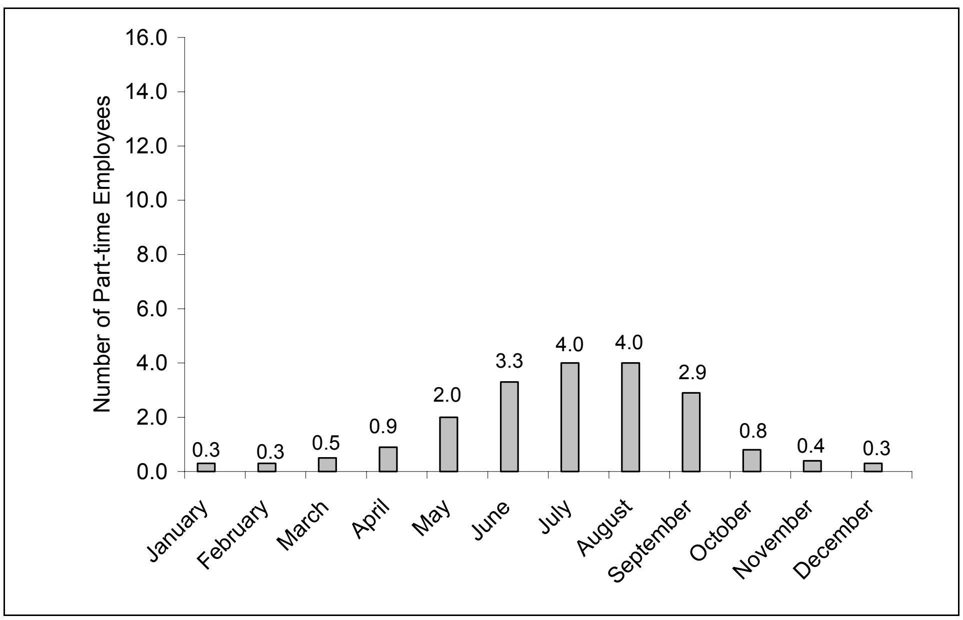


Figure 5. Part-time staffing levels in 2005

3.1.3 Number of Clients

Respondents were asked to estimate the number of their clients who participated in river-based activities in 2005. Respondents were requested to exclude clients who had only purchased retail products from this estimate. The median number of clients for all businesses was 1,450 in 2005, while the total number of clients for all businesses was

215,195 in 2005. Figure 6 illustrates that approximately one quarter of businesses (25.9%) had between 3,000 and 10,000 clients, while almost one third (31.5%) of all businesses had more than 3,000 clients in 2005.

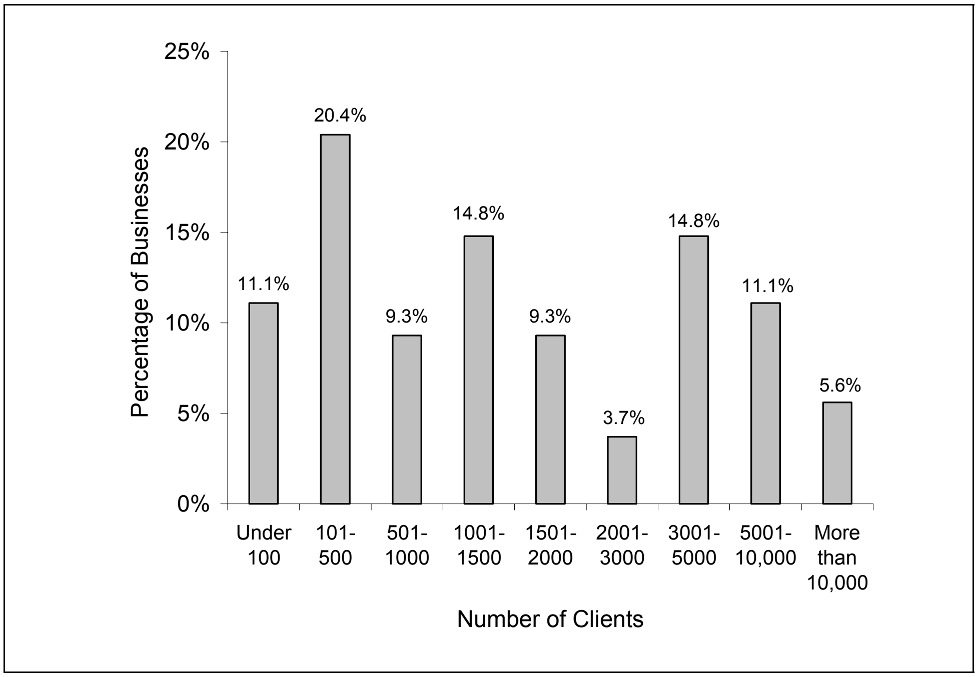


Figure 6. Number of clients in 2005

3.1.4 Comparison of 2005 Client Volume over 2004 Client Volume

Respondents were asked to compare the volume of clients in 2005 to 2004 by indicating if their client volume had increased, decreased or stayed the same. Respondents were also requested to indicate by what percentage their volume had increased or decreased. Overall, 42.6% of businesses reported that volume had increased (Figure 7) by an average percentage of 41.0% (Figure 8). Similarly, 42.6% of businesses reported that volume had decreased (Figure 7), by an average percentage of 16.7% (Figure 8). Only 4.8% of businesses stated that client volume had stayed the same (Figure 7).

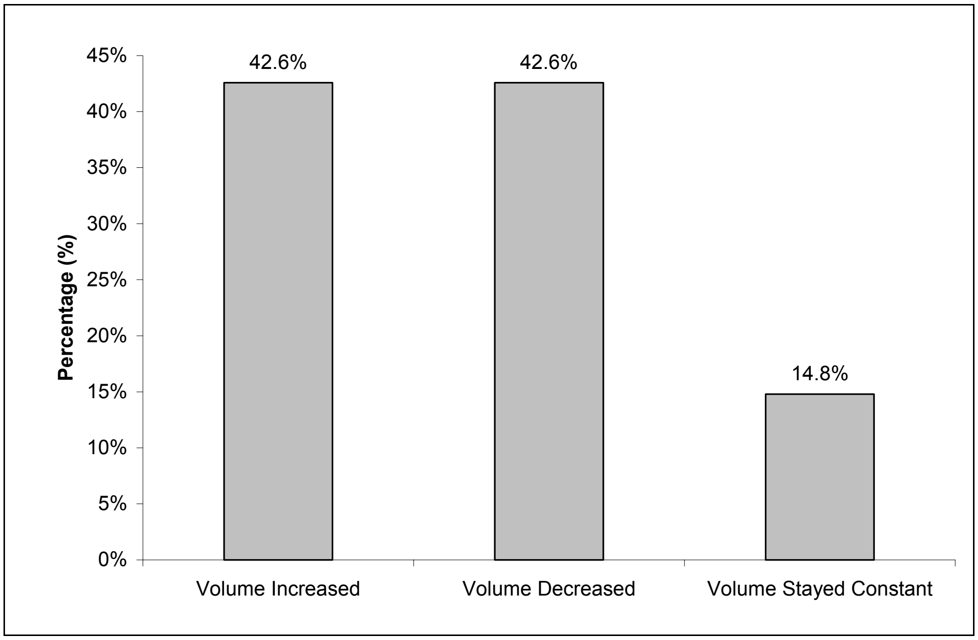


Figure 7. Comparison of 2005 client volume over 2004 client volume

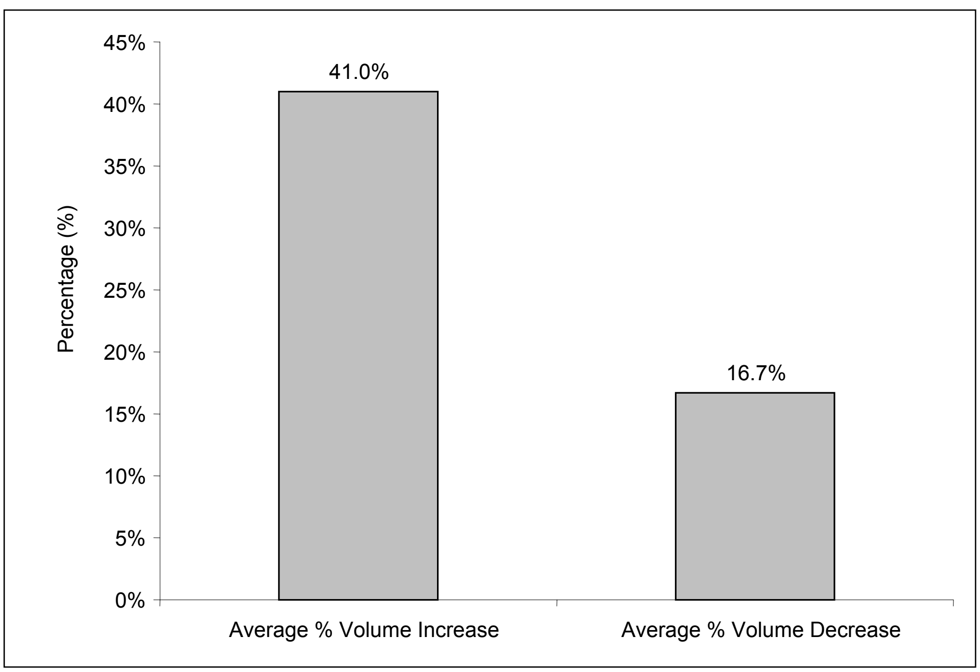


Figure 8. Average percentage increase or decrease in client volume 2005 over 2004

3.1.5 The Rivers upon which Businesses Provide Services

Respondents were requested to list all of the British Columbian rivers upon which they usually conducted river-related activities. For analysis of the data related to operating rivers, the data have not been weighted. It should be noted that the data represents only businesses that responded to the survey and answered the question related to the rivers upon which they operate; therefore, this is not a complete list of all rivers used by river outfitters in the province.

The three most popular rivers were the Fraser River (31.6% of businesses), the Thompson River (23.7% of businesses), and the Chilcotin (18.4% of businesses). Other rivers that were used by several businesses included the Cheakamus, Chilko, Chilliwack, Elaho, Kicking Horse, the Squamish, and or the Tatshenshini Rivers.

3.1.6 Length and Types of Trips Offered

Respondents were asked to state the length of trips that they offered to clients (half day, full day, and/or multiple day trips), if their business did conduct trips in 2005. All responding businesses indicated that their business did provide river outfitting trips in 2005. Half-day trips were the most commonly offered length of trip offered (77.8%), followed by full-day trips (61.1%), and then multiple-day trips (44.4%), (Figure 9).

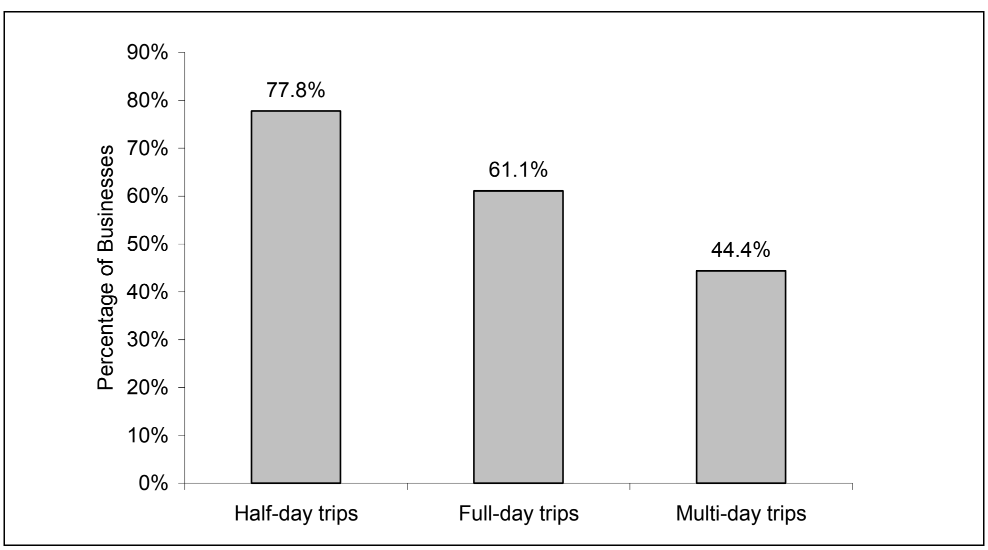


Figure 9. Most commonly offered length of trip

Respondents were also asked if their businesses offered half, full or multiple day trips for each type of trip (scenic and wildlife, family river trips, white water trips, river float trips, jet boat trips, and other). Overall, 87.0% of businesses provided family river trips, 77.8% provided scenic wildlife trips, 77.8% offered white water trips, 61.1% offered river float trips and 16.7% of businesses offered jet boat trips (Table 1).

Table 1. Type and Length of Trips Offered

Type of Trip Offered	All Businesses
Scenic & wildlife trips – overall	**77.8%**
Scenic & wildlife trips: half-day trips	64.8%
Scenic & wildlife trips: full-day trips	27.8%
Scenic & wildlife trips: multiple-day trips	24.1%
Family river trips – overall	**87.0%**
Family river trips: half-day trips	74.1%
Family river trips: full-day trips	38.9%
Family river trips: multiple-day trips	18.5%
White water trips – overall	**77.8%**
White water trips: half-day trips	46.3%
White water trips: full-day trips	48.1%
White water trips: multiple-day trips	35.2%
River float trips – overall	**61.1%**
River float trips: half-day trips	44.4%
River float trips: full-day trips	22.2%
River float trips: multiple-day trips	13.0%
Jet boat trips – overall	**16.7%**
Jet boat trips: half-day trips	16.7%
Jet boat trips: full-day trips	9.3%
Jet boat trips: multiple-day trips	5.6%
Other: Specify: half-day trips* (see below)	1.9%
Other: Specify: full-day trips* (see below)	7.4%
Other: Specify: multiple-day trips* (see below)	1.9%

* Combination scenic/float/white water trips and kayak trips

Breaking the data down for type of trip and length of trip offered, half-day family rivers trips were the most frequently offered trips by all businesses (74.1%), followed by half-day scenic and wildlife trips (64.8%), and then full-day white water trips (48.1%). River float trips and jet boat trips were not offered as frequently as the other types of trips. A few respondents indicated that they offered other types of trips, such as combination scenic, float, and white water trips, as well as kayak trips (Table 1).

3.1.7 Trip Popularity

Respondents were also asked to rank the popularity of each type of trip offered, by trip length, on a scale of one to three (1 = most popular trip length; 2 = second most popular trip length; and 3 = third most popular trip length). Overall, white water trips, half day or full day, were the most popular trips with clients in 2005. Specifically, white water half-day trips were the most popular trip offered, with 33.3% of all respondents stating that these trips were their most popular trip followed by white water full-day trips (31.5%), (Table 2).

Table 2. Most popular trips offered

Type of Trip Offered	All Businesses
Scenic & wildlife trips: half-day trips	20.4%
Scenic & wildlife trips: full-day trips	5.6%
Scenic & wildlife trips: multiple-day trips	14.8%
Family river trips: half-day trips	20.4%
Family river trips: full-day trips	20.4%
Family river trips: multi-day trips	9.3%
White water trips: half-day trips	33.3%
White water trips: full-day trips	31.5%
White water trips: multiple-day trips	9.3%
River float trips: half-day trips	20.4%
River float trips: full-day trips	3.7%
River float trips: multiple-day trips	9.3%
Jet boat trips: half-day trips	13.0%
Jet boat trips: full-day trips	5.6%
Jet boat trips: multiple-day trips	5.6%

3.1.8 Top Revenue-Generating Services

Businesses were requested to rank the top three revenue-generating services offered by their companies in 2005. Respondents had a choice of six services: river trips (half, full and multi-day trips), equipment rentals, course instruction provider, recreational training (non professional), guide training (professional), and other. The top three services were defined as being the three services that generated the most revenue for the business. Respondents ranked services based by their ability to generate revenue for the business (#1 revenue generator, #2 revenue generator, #3 revenue generator). As evidenced in Figure 10, the number one revenue generator for all businesses was river trips. Guide training (professional) was the number two revenue generator (11.1%), while the number three revenue generator was equipment rental (9.3%).

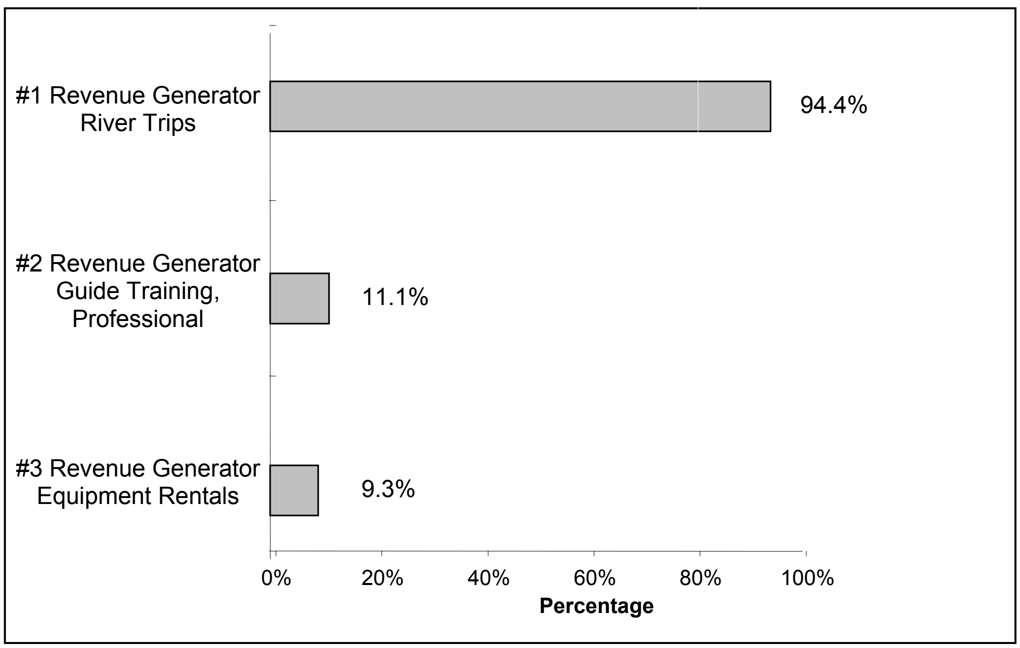


Figure 10. Top three revenue generating services for all businesses

3.1.9 2005 Gross Revenues from River Outfitting Products and Services

Respondents were requested to approximate the percentage of their 2005 gross revenue that was attributable to clients who participated in river-related activities (defined as revenue from guided tours, courses, lessons, and rentals). Overall, businesses reported that 86.1% of their 2005 gross revenue was attributable to clients who participated in river-related activities.

Information was also collected on respondents' gross revenue, from river outfitting products and services in 2005. Respondents were presented with a choice of one of eight gross revenue ranges. Exactly half of all businesses (50.0%) reported that their company's total 2005 gross revenue was $100,000 or less. Approximately, one quarter of businesses (25.9%) reported gross revenue of more than $400,000, (Figure 11).

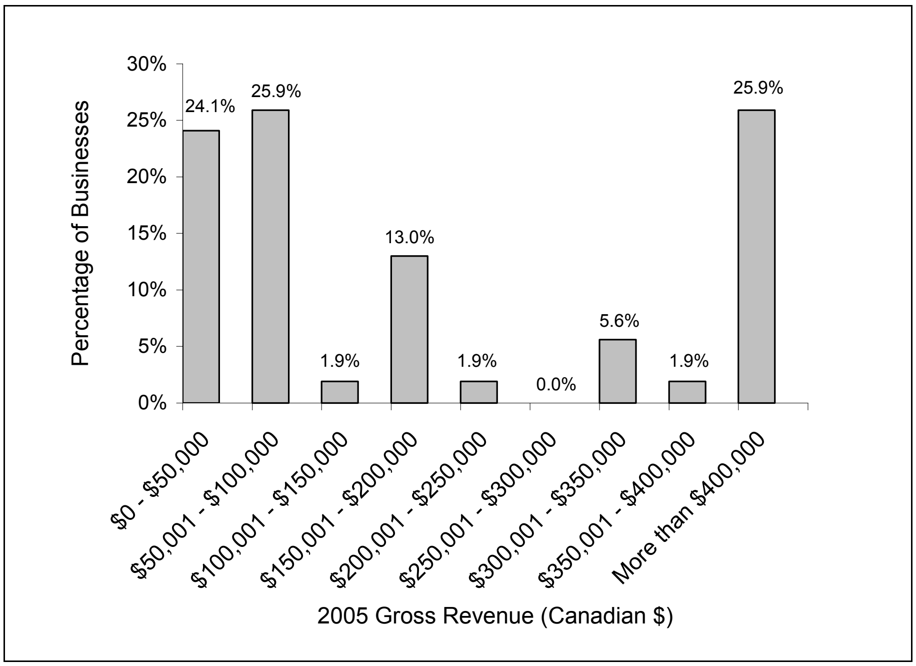


Figure 11. 2005 gross revenue related to river outfitting products & services

In order to determine the average gross revenue earned by river outfitting businesses operating in British Columbia in 2005, the midpoint for each of the nine revenue ranges (see Figure 11) was used. Because the category "more than $400,000" does not have a midpoint, a modest value of $425,000 was assigned as the midpoint to this revenue range. Overall, the average river outfitting business operating in British Columbia in 2005 had an estimated gross revenue of $184,398 from the sale of river outfitting products and services. Consequently, the 2005 gross revenues of the river outfitting sector operating in British Columbia can be estimated at $10,953,250 (Table 3).

As previously highlighted, many businesses reported that a percentage of their 2005 gross revenue was attributable to clients who had participated in river-related activities. Businesses frequently offer additional products and services such as camping, food and beverage, or activities such as fishing, rock climbing or hiking. Therefore, in order to calculate this extra gross revenue, each business' 2005 gross revenue from river-outfitting products and services was factored up to take into account revenue attributable to additional activities. For example, if a business reported that its 2005 gross revenue attributable to river-outfitting products and services was $75,000, but also stated that 80% of the company's 2005 gross revenue was related to clients participating in river-related activities, then this business was estimated to have additional revenue of $18,750 ($75,000 x [(1.0/0.80) – 1] = $75,000 x 0.25 = $18,750). If a business reported that 100 percent of its 2005 gross revenue came from clients participating in river-related activities, they were excluded from this calculation.

Once a figure had been determined for each business reporting additional gross revenue these figures were summed. As set forth in Table 3, in 2005 all businesses had further gross revenue of approximately $3,886,958 from additional activities. Therefore, in 2005 the river outfitting sector, operating in British Columbia, had gross revenues of $14,840,208 (Table 3).

In order to determine the total 2005 gross revenue attributable to tourists participating in river activities, each business' gross revenue from products and services related to river outfitting was multiplied by the business' stated percentage of clients who were tourists (defined as "someone who is not a resident of your community). Consequently, in 2005, the gross revenue attributable to tourists participating in river-based activities in British Columbia was $8,859,538 for all businesses (Table 3).

Table 3. 2005 river outfitting gross revenue estimate breakdown[4]

	2005 Gross Revenues
Average 2005 business gross revenue from products and services related to river outfitting business	$184,398
Total 2005 gross revenue of river outfitting sector operating in British Columbia related to river outfitting business.	$10,953,250
Total 2005 gross revenue from additional activities	$3,886,958
Estimate of total 2005 sector gross revenue	**$14,840,208**
Estimate of total 2005 sector gross revenue attributable to tourists participating in river-related activities	**$8,859,538**

NB: Caution is urged when interpreting the above figures, as the stated sums do not reflect tourist spending on accommodation, food, fuel, and incidentals that may occur pre and post- river trip. In addition, the figures do not include the indirect and induced impacts of spending by river outfitting businesses.

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

Respondents were requested to approximate the total cost to their business, in 2005, of obtaining permits (including all Crown land tenures, and Provincial and National Parks' permits). Businesses were required to choose one of six cost ranges. The majority of businesses (39.6%) spent more than $2,500 on permits and tenures in 2005, while 13.2% businesses spent $500.00 or less (Figure12).

Respondents were also asked to indicate how much time they had spent in 2005 on issues related to tenure, land use, and permits. The average number of hours spent by businesses on issues related to tenure, land use, and permits in 2005 was 81.7 hours. River outfitters were also asked how much they spent on liability insurance in 2005. The median amount spent on liability insurance was $6,500 for all businesses.

[4] These figures represent data from businesses providing river-related activities in British Columbia in 2005, including those with head offices outside of British Columbia.

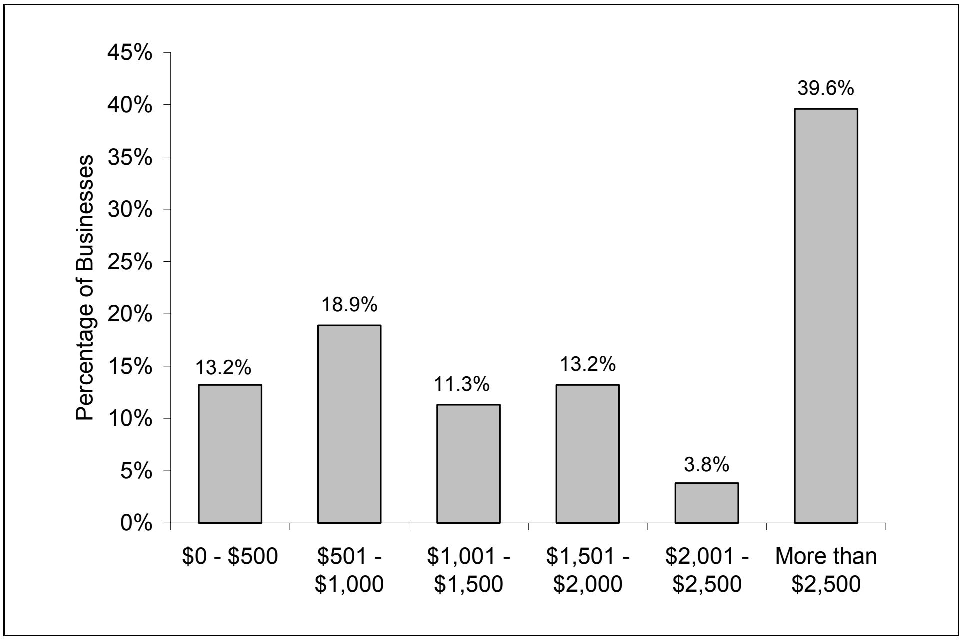


Figure 12. Spending on Crown land tenures, Provincial & National Park permits

3.2 Client and/or tourist characteristics

3.2.1 Client Gender

Respondents were requested to indicate the gender distribution of their clientele. In 2005 river outfitting clientele was evenly distributed between males and females (females = 50.8%; males = 49.3%).

3.2.2 Client Age

Respondents were requested to indicate the percentage of their clientele that fell within each of the eight age categories. Overall, respondents reported that more than one half (51.0%) of their clients were aged 35 to 64. Specifically, over one third (38.2%) of their clientele fell between the ages of 35 to 54 years of age, while 20.4% were 55 years of age and older. On the younger side of the age scale, 41.0% of clients were 34 years or younger, with 19.9% falling between the ages of 18 and 34 and 11.1% who were 17 years of age or younger (Table 4).

Table 4. Age Categories of Clientele

Percentage of Clientele	All Businesses
17 years or younger	11.1%
18 -24 years of age	11.9%
25 - 34 years of age	18.0%
35 - 44 years of age	17.1%
45 - 54 years of age	21.1%
55 - 64 years of age	12.8%
65 - 74 years of age	6.1%
75 years and over	1.5%

Respondents were asked whether or not the age distribution of their river outfitting clients had changed in the last 10 years and if so, how it had changed. Overall, the majority (74.5%) of respondents indicated that the age distribution of their river outfitting clients had not changed in the last 10 years, while 25.5% indicated that it had changed (Figure 13).

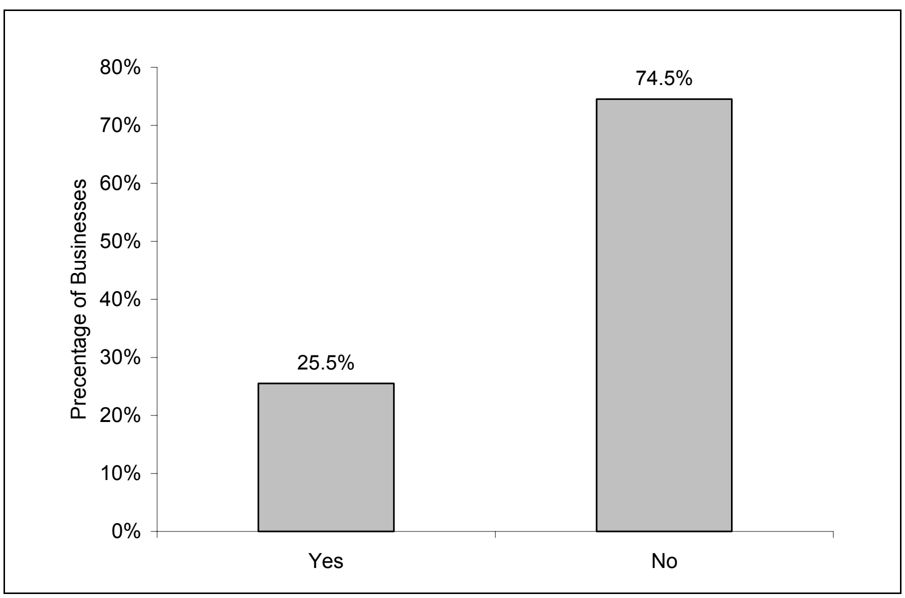


Figure 13. Has the age distribution of clients changed in the last 10 years?

The majority of respondents, who described how their clientele had changed, stated that their clientele were getting older. As one respondent stated, "50% of our business is ages 35+ today whereas 10 years ago maybe only 1/3 of our guests were over 35." Similarly, another respondent stated that the changes he or she was noticing over the last ten years reflected the changing demographics within society, that is, these changes were reflective of Canada's aging population.

3.2.3 Travel Party

Respondents were requested to think about the size of the group their clients travelled with in 2005 and to indicate the approximate percentage of clients who fell within the travel groups of individual, couples, families, friends, tour group and other. As set forth in Figure 14, respondents reported that 32.1% of their river outfitting clients were traveling as a couple, 27.8% were traveling as a family, 22.4% were travelling with friends, and 17.5% were travelling as part of a tour group. A small percentage of respondents (1.8%) indicated "other," which included school and or educational groups, as well as corporate groups and 7.7% were individual travellers.

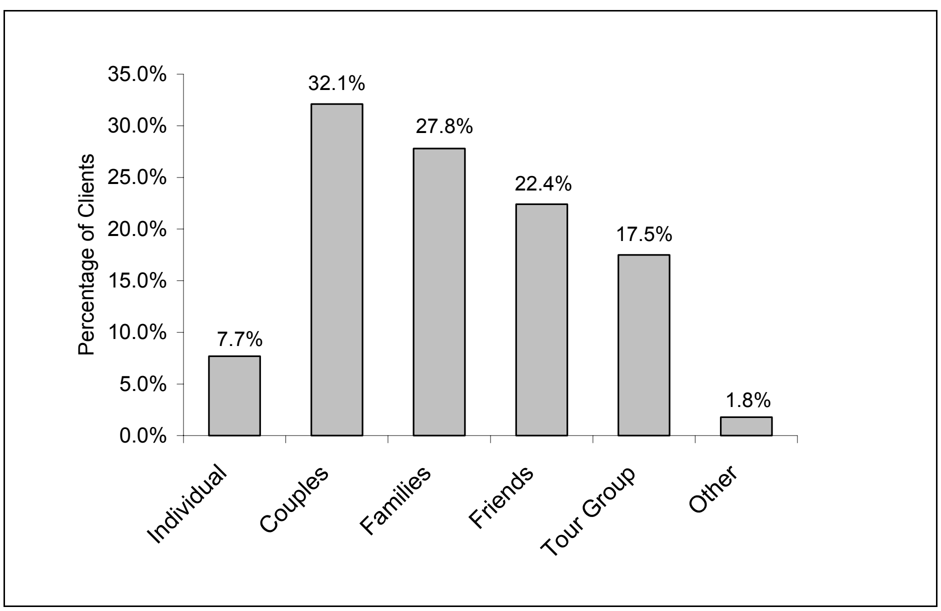


Figure 14. Travel Party Composition

3.2.4 Client Origin

Respondents were asked to indicate the geographic markets of origin for their 2005 tourist clients. For the purposes of this research, a tourist was defined as "someone who is not a resident of your community." As set forth in Table 5, respondents indicated that in 2005 the majority of their clients originated from Canada (53.3%), and more particularly from British Columbia. Respondents also indicated that a slightly larger percentage of their clientele came from overseas markets (25.5%) when compared to the US market (21.4%). Table 5 also highlights that in 2005 over one quarter (26.6%) of tourist clients came from within British Columbia, followed by Alberta (17.5%), the combined group of Germany, Austria and Switzerland (8.7%), and the United Kingdom (7.7%).

Table 5. Client Origin

Client Origin – Percentage	All Businesses
BC	26.6%
Alberta	17.5%
Ontario	4.5%
Other Canada	4.7%
Total Canada	**53.3%**
Washington	3.7%
Oregon	0.9%
Montana	0.6%
Alaska	0.3%
North Eastern US *	3.0%
California	2.9%
Other US	10.0%
Total U.S.	**21.4%**
United Kingdom	7.7%
Germany/Austria/Switzerland	8.7%
Other Europe	3.5%
Asia	1.7%
Other **	3.9%
Total Overseas	**25.5%**

*New England States, NY
** Other defined as Arizona, Texas, Australia, New Zealand, Brazil, South Africa

3.2.5 Nights in the Community

Data was collected from respondents on the approximate number of nights their river outfitting tourist clients had spent within their community. Respondents were asked to assign a percentage of their clientele to each of five time categories (same day, one night, two nights, three to five nights, and six plus nights). Respondents were advised to count nights before, during, and after their clients' river-related trip, to the best of their ability. Figure 15 illustrates that in 2005 almost one third (33.0%) of clients were staying one night in the local community, 25.7% were same day visitors, and 17.9% stayed two nights.

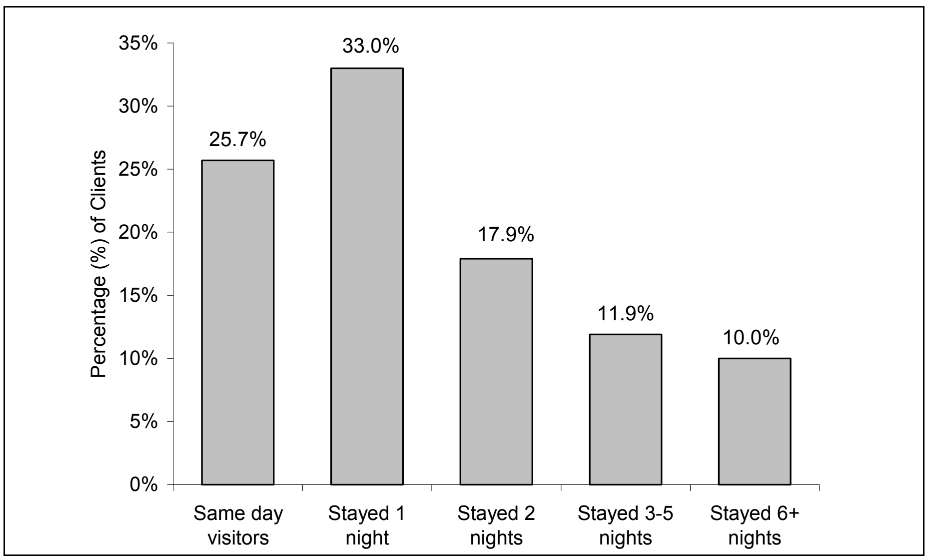


Figure 15. Nights in the community

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

Respondents were asked to approximate the percentage of their clients who participated in river-based activities and who were tourists (defined as someone who was not a resident of the community that the business was located within). Overall, river outfitting businesses reported that over three quarters (78.4%) of their clientele were tourists. Respondents were also requested to state for what percentage of their 2005 tourist clients river-based activities were the main reason for travel to the community of the business. River outfitting businesses indicated that 30.4% of their tourist clients had travelled to the community of the business for the main reason of participating in river-based activities.

3.3 Marketing

Several questions in the survey pertained to the respondent's marketing and advertising, including questions about the marketing methods used, the most effective marketing methods, and the dollar value of marketing and advertising in 2005.

3.3.1 Marketing Methods

Respondents were requested to indicate all of the marketing methods they utilized in 2005, from a list of 18 methods (Table 6). Respondents had the option of also indicating that they had not employed any marketing methods in 2005 (0.0% of respondents). The three most commonly used marketing methods in 2005 were businesses' own web site (94.0%), brochures and or posters (92.0%), and yellow pages (63.3%).

Table 6. Marketing methods utilized in 2005

Marketing Method	All Businesses
Your web site	94.0%
Brochures, posters	92.0%
Yellow pages	63.3%
Wholesale operations	60.0%
Magazine ads	52.0%
Other web site	50.0%
Public relations	46.0%
Newspaper ads	46.0%
Provincial/regional travel guides	46.0%
E-mail promotions	44.0%
Travel agents	40.0%
Consumer or trade shows	36.0%
Direct mail to past customers	34.0%
Direct mail to future prospects	32.0%
Other *	30.6%
Radio or television ads	26.0%
Travel agency travel guides	18.0%
Film shows, slide shows	8.0%

* Other defined as billboards, information centres, local travel guides, and cold calling

Respondents also had the opportunity to describe other marketing methods employed in 2005 that were not specifically listed. A couple of respondents indicated that they advertised on billboards, while a few other respondents indicated that they advertised in information centres, with local travel guides, or did cold calling.

3.3.2 Three Most Effective Marketing Methods

Businesses were asked to indicate their three most effective marketing methods in 2005. This question was open-ended, in that respondents did not have a list of methods to choose from. As evidenced by Figure 16, in 2005 brochures and posters were the most effective marketing method for 66.1% of businesses, followed by the business' own website (40.7%), and then word of mouth advertising (30.5%).

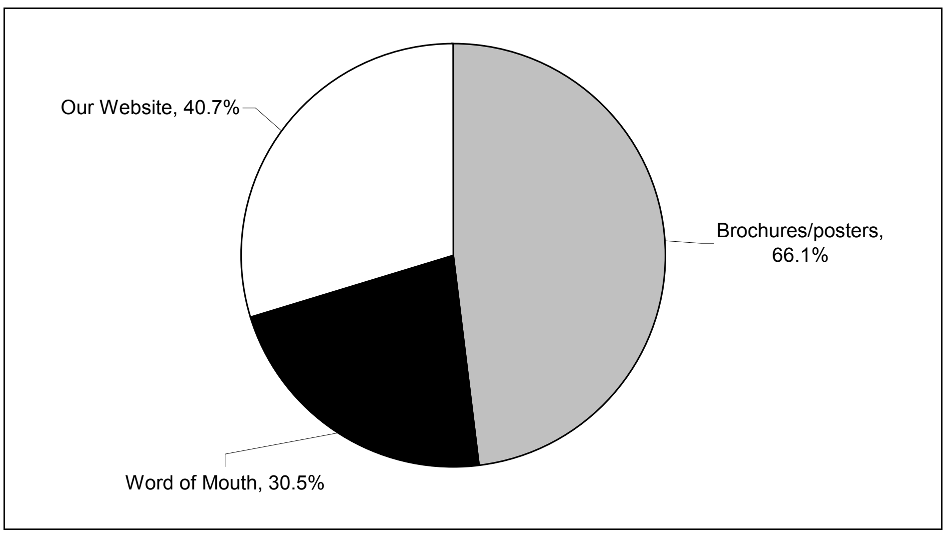


Figure 16. Three Most Effective Marketing Methods

3.3.3 Expenditures for Marketing and Advertising Efforts

The last marketing question in the survey asked respondents to indicate how much their businesses had spent on marketing and advertising in 2005. Respondents were offered a choice of one of seven dollar categories. As Figure 17 indicates, the majority of businesses were spending more than $20,000 on marketing and advertising in 2005 (43.4%). Very few businesses were spending $1,000 or less on marketing and advertising in 2005 (1.9%). Overall, the average business spent approximately $14,000 on marketing and advertising efforts in 2005.

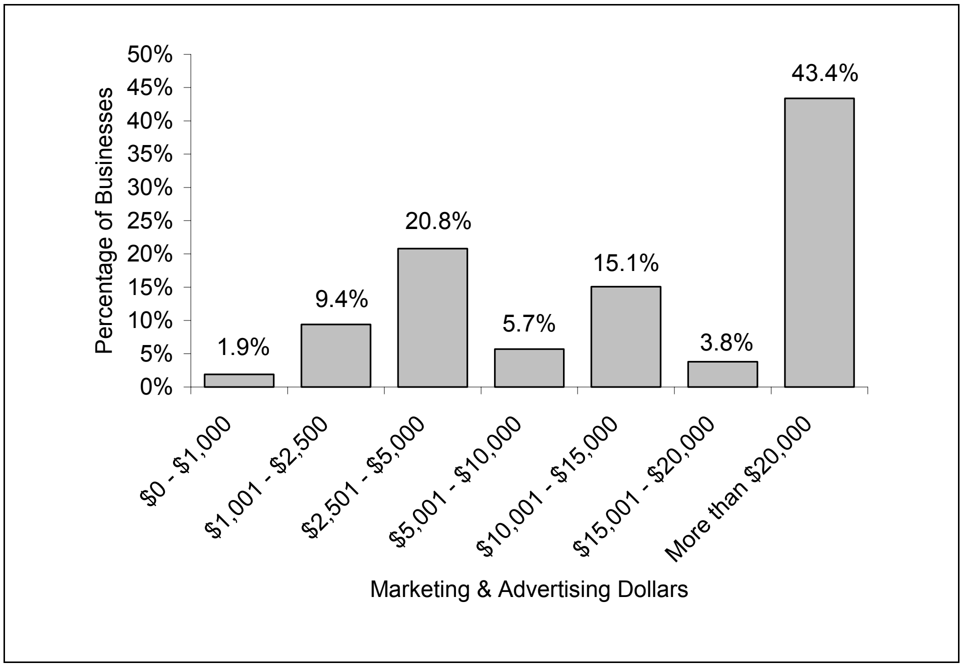


Figure 17. Amount spent on marketing and advertising

3.4 Constraints to growth, opportunities for growth, and suggestions for supporting business growth

This section of the report will discuss the findings of survey questions that related to the respondent's perceived constraints to growth in his or her business, the three most promising opportunities for river outfitting businesses, and the three most important things that could be done by businesses and government to help grow more profitable businesses.

3.4.1 Constraints to Growth

The first question in this section of the survey asked respondents to consider the long-term growth of their business and to then rate each listed constraint, as being "not applicable, "not a constraint," a "slight constraint," a "moderate constraint," or a "serious constraint." The constraints were divided into five general categories (transportation, business growth, government regulations, human resources, and other). Each of these five general categories contained more specific constraints. The results for all businesses are outlined in Table 7.

Table 7 illustrates that 48.1% of businesses felt that they were seriously constrained by "too much government regulation." Over half of businesses (53.7%) did not feel that a "lack of government regulation" was a constraint to growth; however, 51.9% of businesses felt that a "lack of government enforcement of (existing) regulations" was a constraint to varying degrees (slight, moderate or serious constraint).

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

When these findings are paired with the answers from an open-ended question that requested respondents to state the three most serious constraints faced by their river outfitting businesses, it became apparent that the finding of "too much government regulation," was more specifically related to the amount of paperwork required to operate a river outfitting business in British Columbia. Many respondents stated that the most serious constraint facing their business was the time and effort required to complete the paperwork related to licensing, tenures and permits, and the cost of obtaining same. As one respondent pointed out, four business licenses are required to run one trip. The respondent went on to state that his or her business was "paper worked to death." Another respondent stated that 60 percent of his or her time was spent on business licences, permits, tenures, reports, studies, border papers, sales tax, and foreign worker applications.

Table 7. Constraints to Business Growth

Constraints – All Businesses	Not Applicable	Not a Constraint	Slight Constraint	Moderate Constraint	Serious Constraint
Transportation					
Limited or poor air access for visitors	11.1%	20.4%	29.6%	16.7%	22.2%
Limited or poor ground access for visitors	11.3%	50.9%	13.2%	15.1%	9.4%
Travel safety concerns or hassles	18.0%	46.0%	22.0%	14.0%	0.0%
Business Growth					
High marketing costs	3.8%	7.5%	28.3%	32.1%	28.3%
Lack of marketing research	9.4%	24.5%	18.9%	26.4%	20.8%
Difficulty accessing capital $ for expansion	10.0%	24.0%	18.0%	22.0%	26.0%
Lack of co-ordinated marketing	7.7%	15.4%	17.3%	19.2%	40.4%
Difficulty securing permits	0.0%	24.5%	34.0%	20.8%	20.8%
Difficulty securing insurance	1.9%	30.2%	34.0%	11.3%	22.6%
Difficulty developing good working relationship with First Nations	24.1%	31.5%	18.5%	11.1%	14.8%
Price competition	9.3%	7.4%	38.9%	29.6%	14.8%
Lack of accommodation facilities	3.7%	66.7%	7.4%	16.7%	5.6%
Poor quality accommodation services	3.7%	70.4%	9.3%	5.6%	11.1%
Competition from other sports and activities	9.3%	11.1%	38.9%	22.2%	18.5%
Government Regulations					
Too much government regulation	3.8%	13.5%	23.1%	11.5%	48.1%
Lack of government regulation	11.1%	53.7%	13.0%	7.4%	14.8%
Lack of government enforcement of regulations	9.3%	38.9%	13.0%	18.5%	20.4%
Canada/USA border issues	20.4%	18.5%	20.4%	20.4%	20.4%
Human Resources					
Finding staff with adequate training	7.4%	16.7%	20.4%	29.6%	25.9%
Retaining staff with adequate training	7.4%	20.4%	33.3%	16.7%	22.2%
Inadequate staff performance	11.1%	42.6%	37.0%	7.4%	1.9%
Other					
Weather constraints	7.4%	13.0%	46.3%	24.1%	9.3%

Table 7 also highlights that 55.5% of all businesses felt that the long-term growth of their business was moderately to seriously constrained by the inability to find and retain "staff with adequate training." Almost two thirds (60.4%) of businesses felt moderately to seriously constrained by high marketing costs, and similarly, 59.6% of businesses felt moderately to seriously constrained by the lack of coordinated marketing. Additionally, 41.6% of businesses felt moderately to seriously constrained by the difficulty of securing permits.

Some businesses stated that the provincial governing body was the most serious constraint facing their business. One respondent stated that Land and Water, British Columbia had an "imperceptible involvement" [in matters related to river outfitting], "except in fee collection." Another respondent stated that Land and Water, British Columbia's "refusal to move [the] tenure process along," was the most serious constraint facing his or her business[5].

Respondents were also invited to describe, in their own words, any constraints that were not covered in the previous survey question. While many of the respondents took the opportunity to expand upon constraints that have already been discussed in this report, some respondents did state some additional constraints, such as the price of gas, the lack of tourists, the perception by tourists that Whistler has become too busy and too expensive because of the 2010 Winter Olympic and Paralympic Games, and changing demographics that are resulting in less clients in the younger age categories participating in river-related activities. Numerous respondents offered suggestions on how to best address some of the most serious constraints that impact the long-term growth of their businesses. Please see Appendix C for the verbatim comments made by respondents.

[5] Land and Water British Columbia was re-organized in 2003. While some businesses stated that they were aware that the entity no longer existed, they stated that they were unsure of the correct name.

3.4.2 Most Promising Opportunities

Despite the fact that many river outfitting businesses are facing constraints that impact the long-term growth of their business, many businesses recognize that there are also some promising opportunities. One of the questions asked the respondents to list what they felt were the three most promising opportunities for their business. Many businesses saw opportunities in further developing their own business, either through the purchase of land or the development of new and or more diversified product offerings. A few businesses also stated that they saw opportunities in the upcoming 2010 Olympic and Paralympic Winter Games. Other businesses saw opportunity in markets, such as eastern Canada and Europe, while others saw opportunities with the baby-boomers, and the increasing interest in nature-based and adventure tourism. Finally, some respondents recognized potential in the natural beauty of British Columbia, including its clean water (for a verbatim list of all stated opportunities, please see Appendix D).

3.4.3 Opportunities for Businesses and Government to Help Grow More Profitable Businesses

Respondents were requested to list what they felt were the three most important things that could be done by their business and or the government to help them grow more profitable businesses. With respect to what their own business could do, a few businesses stated that they needed to better market the industry as a whole, including improving their web presence, and "spread[ing] the word about [the] legitimacy of [the] industry." One business felt that increasing the cost of trips to clients would help his or her business to be more profitable (Table 8).

Eliminating, easing, streamlining, and clarifying policies, tenures, and licensing was the number one issue that could be addressed by government to help river outfitting businesses become more profitable. A couple of businesses stated that more diligent regulation of safety standards and "shoddy operations," was one of the most important things that could be done by government to help them grow more profitable businesses (Table 8).

Table 8. Most important things that could be done to grow more profitable businesses

Done by business	
	Better marketing of industry as a whole.
	Improve web presence.
	Raise prices.
	Spread word about "legitimacy" of industry.
Done by government	
	Ease development requirements to allow more tourism opportunity/ease backcountry policy/cut government red tape/streamline & clarify tenure process, licenses, etc.
	Campaign south of border.
	Better & more frequent ferry service.
	Regulate safety/shoddy operations.
	Enforce government regulation.
	Decrease insurance costs.
	Reduce gas prices.
	Get land.
	Foreign workers.
	Tourism training for students.

3.5 General Comments

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

4.0 SUMMARY, RECOMMENDATIONS AND CONCLUSIONS

4.1 Summary

Based on the findings from this project, it is apparent that river outfitting businesses operating in British Columbia contribute considerably to the economy of the province. Overall, in 2005, river outfitting businesses had overall gross revenues of approximately $15 million, while gross revenue attributable to tourists participating in river-related activities was approximately $9 million.

A summary of the results are as follows:

- There were 59 businesses offering river-related activities within the province of British Columbia in 2005/2006;
- The majority of businesses have been in business for five or more years, with the average business in operation for 14.8 years;
- The majority of businesses are relatively small, employing, on average, 5.5 full-time staff and 1.6 part-time staff in 2005;
- River outfitting businesses provided products and services to almost 216,000 customers in 2005;
- Family river trips were the most frequently offered trip by businesses;
- Half-day family river trips were the most frequently offered trips by all businesses;
- River trips were the number one revenue generator for virtually every river outfitting company in 2005;
- The river outfitting sector draws most of its clients from the domestic markets of British Columbia and Alberta. Internationally, the sector has a strong presence in the United Kingdom, and the group of Germany, Austria and Switzerland;
- The clientele is fairly evenly divided between males and females. The average client is from British Columbia, between the ages of 35 and 54 years of age and usually travels as part of a couple, a family or with friends;

- Businesses reported that most of their river outfitting clients stay one night in the local community and that almost one third of their clientele travelled to the community specifically to participate in river-related activities;
- Over three quarters of all clients in 2005 were classified as tourists (for the purposes of this research, a tourist was defined as "someone who is not a resident of your community");
- The average river outfitting business spent approximately $14,000 on marketing and advertising in 2005;
- The most commonly employed marketing methods in 2005 were brochures and/or posters, individual business web sites, and wholesale operations. Businesses reported that the most effective avenues for marketing and advertising were brochures and posters, followed by the business' own website, and word of mouth;
- The majority of businesses stated that too much government regulation was the number one issue constraining the long-term growth of their businesses; however, the majority of businesses also stated that the lack of government enforcement of existing regulations was similarly constraining the long-term growth of their businesses;
- Many river outfitting businesses would also like to see government more closely regulate safety and monitor operators who may not be meeting such standards;
- Some businesses see opportunity in further developing their own business, either through the purchase of land or the development of new and/or more diversified product offerings. While a few businesses also stated that they see opportunities in the upcoming 2010 Olympic and Paralympic Winter Games, others recognize opportunities in the natural beauty of British Columbia, including its clean water and the growing interest of clients in nature-based tourism and adventure tourism opportunities.

4.2 Recommendations

The results from this study lead to several recommendations for the river outfitting sector. Many businesses expressed concerns related to their inability to obtain and retain qualified staff. Businesses may wish to utilize the resources provided by Go2hr.ca, a web-based resource for employers and employees in the tourism industry in British Columbia.

Similarly, numerous businesses expressed the desire for joint marketing initiatives. Any marketing initiatives that are established should be accompanied by a means of evaluating such programs, particularly through tracking programs.

The Asian market currently represents a very small share of the sector's clientele but may hold promise for the river outfitting sector, given this market's interest in nature-based and adventure-based tourism experiences. Therefore, businesses may wish to begin focusing marketing campaigns on not only the adventure aspect of river-based activities, but also the ability to see nature while participating in river-based activities as a means of capturing more of this growing market.

White water trips were the most popular trip with clients and yet some businesses are not offering white water trips. While it is acknowledged that all businesses may not have the capabilities to access rivers with white water, businesses who are not offering this type of trip and who are able to do so, may wish to offer white water trips to clients as a way to increase revenues.

Many businesses expressed their frustration with government regulation and the plethora of paper work required for permits, tenures, and so on. It may be valuable for businesses to establish a committee to work with the various levels of government to find ways to streamline some of the required paperwork and simplify policies and licensing procedures.

Finally, it would be valuable to undertake further research on the river outfitting sector from a client perspective. Client surveys could be undertaken with river outfitting businesses that were willing to work with Tourism BC to follow up with clients after they have participated in river-related activities. It would be of value to collect data on demographics, trip planning, spending, post-trip satisfaction, et cetera, to inform marketing and product development activities.

4.3 Conclusion

The results presented in this report have begun to build foundational knowledge regarding the characteristics of river outfitting businesses in British Columbia and, consequently, this research adds layers of knowledge to various research projects already undertaken on nature and activity-based tourism sectors in British Columbia (see www.tourismbc.com and follow the links from research to sector research). As British Columbia moves toward hosting the 2010 Olympic and Paralympic Winter Games, it is anticipated that this research will be of assistance to established businesses, as well as to those seeking to establish businesses. Further, it is anticipated that this research will be of value to the numerous stakeholders in the tourism industry, including the various levels of government as they work in collaboration with the tourism industry to continue developing an economically viable and sustainable industry.

5.0 LIMITATIONS

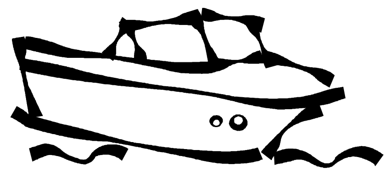
There are limitations, as follows, to the research presented herewith:

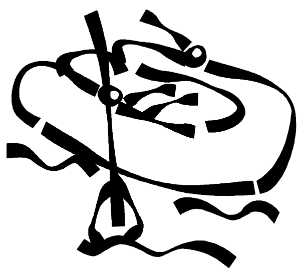
- The research was undertaken during the busy season for businesses and, therefore, some businesses may have been too busy to participate;
- Although every effort was made to have an up-to-date database, the database, compiled in 2005, may have included some businesses that were no longer in businesses and or businesses that were in their initial year of operation;
- Many of the questions required respondents to indicate ranges of values or percentages. Consequently, many stated values may be based on best estimates as opposed to actual values;
- Data regarding clients were, in many cases, best estimates by respondents, as this survey did not collect data directly from clients;
- Gross revenue estimates do not include tourist spending on accommodation, food, fuel, and incidentals that may occur pre and post river trip. Additionally, the gross revenue estimates do not include indirect and induced impacts of spending by river outfitting businesses.

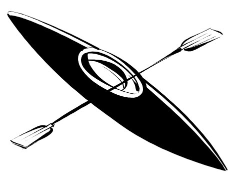
APPENDIX A - QUESTIONNAIRE

Commercial River Outfitting Tourism Survey

Working together to build your tourism business in British Columbia







TOURISM BRITISH COLUMBIA CANADA ®

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

Valerie Sheppard
Tourism British Columbia
300-1803 Douglas Street
Victoria, BC V8W 9W5

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

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

Q1. In **2005**, did you offer river-based activities, services and/or products to clients? **River-based activities include any commercial river-based business and includes fresh water kayaking, snorkelling, rafting, jet boating, guide training, and safety training.**

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

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

Q2. In **2005**, did you offer **only** river-outfitting products (retail sales) and **not** river-based activities/services (rentals, outfitting, guided tours, training courses, lessons)?

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

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

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

Q3. How many years has your business been offering products/services to clients participating in **river-related activities/services**? (i.e. Rentals, outfitting, guided tours, training courses, lessons, retail sales)

________**NUMBER OF YEARS**

Q4. In **2005**, what length of trips did you offer to clients? (Please circle **all** that apply)

a. Half-day trips
b. Full day trips
c. Multiple day trips
d. Did not offer trips → **Please proceed to Question 6.**

Q5. For each type of trip that you offered in **2005**:

A. Please indicate whether you offered half, full, and/or multiple day trips. Please place a checkmark (?) beside **all** that apply.

Type of Trip Offered	Half-day Trips	Full-day Trips	Multiple-day Trips
Scenic & wildlife trips			
Family river trips			
Whitewater trips			
River float trips			
Jet boat trips			
Other: Specify: ___________________			

A. For each type of trip that you offered in **2005**, which trip length was most popular amongst your clients? For each trip type, please rank as follows:

1 = Most popular trip length
2 = Second most popular trip length
3 = Third most popular trip length

Type of Trip Offered	Half-day Trips	Full-day Trips	Multiple-day Trips	Did Not Offer
Scenic & wildlife trips				
Family river trips				
Whitewater trips				
River float trips				
Jet boat trips				
Other: Specify: ______________				

Q6. In what **city** or **town** is your business based? (i.e. head office)

____

Q7. Approximately what **percentage** of your **2005 gross** revenue came from clients or guests who participated in **river-related activities**? Please include all revenue from guided tours, courses, lessons, and rentals.

_______% of **2005 GROSS REVENUE** from clients participating in river-related activities

Q8. In the table below, please rank the **top three services** your company offered in **2005**. Your top three services would be the services that generated the highest revenue for your company. Please place a checkmark in the appropriate (√) box.

Type of Service Offered	#1 revenue generator	#2 revenue generator	#3 revenue generator
River trips (half day, full day & multi-day trips)			
Equipment rentals			
Course instruction provider			
Recreational training (non-professional)			
Guide training (professional)			
Other: Specify: ________________			
Other: Specify: ________________			

Q9. Please list all of the British Columbia rivers upon which your business usually conducts **river-related activities.**

1.____

2.____

3.____

4.____

5.____

6.____

7.____

8.____

SECTION 2: This section of the survey asks you about the operating environment of your river-outfitting business and barriers to growth.

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

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

Q2. Are there any **constraints** you would like to add that are not listed on the previous page? Please specify.

Q3. What do you consider to be the three (3) **most serious** constraints faced by your **river-outfitting** business?

1.
2.
3.

Q4. Thinking of the most serious constraints listed in Section 2, Question 3, do you have any suggestions about how to address the issues that will impact your long-term growth? (Please explain below.)

Q5. What do you feel are the three (3) **most promising** opportunities for your business?

1.
2.
3.

Q6. What do you feel are the three (3) **most important** things that could be done by your business and/or the government to help you grow a more profitable business?

1.____

2.____

3.____

SECTION 3: This section of the survey asks about your clients who participate in river-based activities. Please provide the most accurate responses possible.

Q1. Approximately how many clients, participating in river-based activities, did your business serve in **2005**? Do **NOT** include clients who **only** purchased retail products.

____________________ **ESTIMATE NUMBER OF CLIENTS** who participated in river-based activities

Q2. Compared to 2004, did the volume of your clients who participated in **river-based activities** increase, decrease, or stay the same in **2005**?

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

Q3. In **2005**, approximately what percentage of your clients, who participated in **river-based activities,** were male and what percentage were female?

a.______% Male
b.______% Female
Total =100 % of clients who participated in river-based activities

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

__________% **REPEAT CLIENTS** participating in river-based activities

Q5. Approximately what percentage of your **2005** clients, participating in river-based activities, were in each of the following age categories? Please mark zero percent **(0%)** if there were no clients in a particular group.

a._____% 17 years or younger
b._____% 18 to 24 years
c._____% 25 to 34 years
d._____% 35 to 44 years
e._____% 45 to 54 years
f._____% 55 to 64 years
g._____% 65 to 74 years
h._____% 75 years and over
Total =100 % of clients participating in **river-based activities**

Q6. Has the age distribution of your clients, participating in **river-based activities,** changed in the last **10** years (or since opening, if operating for less than 10 years)?

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

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

a._____% Individual
b._____% Couples
c._____% Families
d._____% Friends
e._____% Tour Group
f._____% Other ___________
Total =100 % of clients who participated in **river-based activities**

SECTION 4: This section of the survey asks you about your TOURIST clients. (A tourist is defined as someone who is not a resident of your community.)

Q1. In **2005,** approximately what percentage of your clients who participated in **river-based activities** were **tourists?** (**A tourist is defined as someone who is not a resident of your community.**)

___________ % of clients who were **TOURISTS**

Q2. Please indicate what percentage of your **2005 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.

a. ______% Within British Columbia
b. ______% Alberta
c. ______% Ontario
d. ______% Other Canada
e. ______% Washington
f. ______% Oregon
g. ______% Montana
h. ______% Alaska
i. ______% North Eastern US (New England States, New York)
j. ______% California
k. ______% Other US
l. ______ % United Kingdom
m.______ % Germany/Austria/Switzerland
n. ______ % Other Europe
o. ______ % Asia
p. ______% Other _____________

Total = 100 % of **tourist** clients who participated in river-based activities

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

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

Total =100 % who were **tourists**

Q4. For what percentage of your **2005 tourist** clients were river-based activities the main reason for their travel to your community?

_____________ % of **tourist** clients

SECTION 5: This section of the survey asks you about staffing in your business.

Q1. Please fill in the table below with corresponding answers pertaining to your full and part-time **paid** staff. **Please include yourself and any paid family members working for your company.**

a. During what months in **2005** did your business employ full-time and/or part-time **paid** staff? (Please place a checkmark (√) beside **all** months where your company had paid staff in column a, the first column of the following table.)

b. How many full-time **paid** staff did your business employ during each month of **2005**? (Please record your responses for each month in the table below under the second column b.)

c. How many part-time **paid** staff did your business employ during each month in **2005**? (Please record your responses for each month in the table below under the third column c.)

a. In 2005, what months did you employ full or part-time paid staff? Check all appropriate months.	**b. How many full-time paid staff did you employ in each month of 2005?** Fill in the number of full-time staff you had in each month. Full-time staff worked 30 hours or more per week.	**c. How many part-time paid staff did you employ in each month of 2005?** Fill in the number of part-time staff you had in each month. Part-time staff worked less than 30 hours per week.
Please checkmark all that apply (√)	# of **full-time** staff per month in 2005	# of **part-time** staff per month in 2005
______ January		
______ February		
______ March		
______ April		
______ May		
______ June		
______ July		
______ August		
______ September		
______ October		
______ November		
______ December		

SECTION 6: This section of the survey asks you about your company's marketing and advertising. Please provide your most accurate responses possible.

Q1. Please fill in the table below.

A. What marketing methods did you use in **2005**? Please mark each method used in **COLUMN A**.

B. For each method used, please indicate the approximate **percentage of your total marketing budget** that you allocated to this method in **2005.** For each marketing method selected, fill in the appropriate percentages in **COLUMN B**. The total should equal 100%.

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

Q2. In **2005**, what were your three (3) **most** effective marketing methods?

1.____

2.____

3.____

Q3. How much did your business spend on marketing and advertising in **2005**? (Please circle **one** answer only.)

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

SECTION 7: This section of the survey asks you about your river-outfitting business spending and revenue from clients participating in river-based activities.

Q1. In **2005**, approximately how much did your business spend on permits, including all crown land tenures, and Provincial and National Parks' permits? (Please circle **one** answer only.)

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

Q2. In **2005**, 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 **2005**

____________________ # of **TOTAL DAYS** (8 hours in a day) in **2005**

____________________ # of **TOTAL WEEKS** (7 days in a week) in **2005**

Q3. In **2005,** who much did your company spend on liability insurance?

$ __________ = COST OF LIABILITY INSURANCE (2005)

Q4. In **2005,** what were your total gross revenues from **products and services** related to your river-outfitting business? (Please circle **one** answer only.)

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

Q5. Are there any questions, comments, or concerns that you would like to share with us? (Please feel free to use the adjacent page if necessary.)

Thank you very much for your participation!

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

APPENDIX B – METHODOLOGY

2.3 Data Collection

Data was collected by means of a mail back questionnaire sent to all companies in the combined BCROA and Research Services' database. The mail back questionnaire sought to develop a more comprehensive understanding of river outfitting businesses operating in British Columbia. Businesses were asked to respond to the questions using the calendar year of 2005 as a timeframe for most questions, although some questions related to changes from 2004 to 2005, or an accumulation of the years 2003, 2004, and 2005. Businesses were asked to respond to questions on the following topics:

- Nature of the business (services or products and services, years in business);
- Length of trips offered to clients (half day, full day, and multiple day trips);
- Length of trips offered to clients, specified by type of trip offered (scenic & wildlife trips, family river trips, white water trips, river float trips, jet boat trips, and other);
- Popularity of various trips offered;
- Location of head office;
- Percentage of gross business revenue related to clients participating in river-related activities (including guided tours, courses, lessons, and rentals) and total gross revenue from products and services related to river outfitting;
- Ranking of top three revenue generators for services offered (river trips, equipment rentals, course instruction, recreational training, guide training, and other);
- Rivers where river outfitting trips were conducted;
- Constraints to growth, including the three most serious constraints to growth;
- Most promising opportunities;
- Areas that businesses and government should be focusing on to help create more profitable river outfitting businesses;
- Number of clients and/or tourists;
- Percentage increase/decrease in volume of clients;

- Demographic breakdown of clients;
- Percentage of repeat clientele;
- Percentage of clientele who were tourists (a tourist was defined as someone who was not a resident of the community in which the business was located)
- Length of tourist client stays;
- Percentage of tourist clientele who travelled to the community to specifically participate in river-based activities;
- Business staffing numbers;
- Marketing expenditures and methods;
- Operating expenditures, including specific questions related to:
    - Permits, including Crown land tenures and Provincial and National Parks' permits;
    - Liability insurance;
- Time spent by business on issues related to tenure, land use, and permits;
- Opportunity for respondents to share questions, comments, or concerns;

In May of 2006, questionnaires were mailed to 78 businesses offering river outfitting services or river outfitting services and products in the province of British Columbia, including businesses head quartered in British Columbia, Alberta, Yukon Territory, and Alaska, U.S.A. An introductory letter, which provided details about the nature of the research, was included with the survey, as was a stamped return envelope to Tourism BC. Reminder letters were sent to non-responders in June of 2006, followed by a second mailing in June of 2006. During the months of June, July, August, and September non-responding businesses were telephoned in an attempt secure their completed questionnaires.

The survey closed on October 10, 2006 at which time a total of 38 completed surveys had been received for an overall response rate of 64.4% (59 of the original 78 companies appeared to be in business at the completion of the survey process). Surveys returned unopened by Canada Post were not included in the calculation of the response rates, nor were surveys that were sent to companies that indicated they not offer river outfitting services and products. Similarly, if a company indicated that they only offered river outfitting products they were requested to return the survey without answering the remainder of the questions (products were defined as retail sales).

APPENDIX C – MOST SERIOUS CONSTRAINTS

Thinking of the most serious constraints listed in Section 2, Question 3, do you have any suggestions about how to address the issues that will impact your long-term growth? (Please explain below.) [6]
Since the introduction of the Land Tenure with L&WBC numerous problems have arisen from difference between the areas, Squamish, Chilcotin, Chilliwack, all have different requirements. Needs to be standardized. First Nations requiring archaeological digs, enormous and difficult application forms, long delays in turn around time, and expenses related to all of the above.
Use LWBC to assess our access and usage, then apply a common sense "Tax"
If the province is truly interested in tourism, insurance companies will be made aware of tourism importance by our government. The stifling fees can be equated with greed.
Better ferry service and skies.
Province has done nothing to promote adventure outside of the core destination resort areas. Rafting companies in Whistler can put up a sandwich board on the sidewalk and get 100 customers a day because people have come to that destination to enjoy a range of adventure and outdoor activities. The synergy of 100's of hotels/resorts and a resort association is impossible to compete with even though our adventure resort offers similar features.
Convince competitors to charge true price of doing business.
Obtain financing to purchase land (very difficult).
Dealing with "Administration" is going to burn us out. Biz Lic, tenure, permit, reports, arch studies, border papers, sales tax, foreign worker applications, etc occupy 60% of my time. Time that should be spent selling, booking, marketing.
Need to address perception of rafting and have a provincial approach to the sector.
Instead of wasting gov't money on talk and surveys, develop some real marketing strategies that will be effective. Allow operators some voice in how marketing dollars are spent.
Regulate the insurance industries to prevent the rip offs that result from their poor investment decisions, or provide govt help for self insurance policies.
Promote and develop the tourism industry as a desirable choice for young people.
Go back to old system or finish new one.
Regulate safety issues.
Lobbying govt to enforce the regulations they have in place
Lobbying govt to put some effort into finding more operators that aren't following regulations
Lobbying insurance co. to require that water based operators have adequate training and equip. before issuing insurance.
Sector marketing such as the Guest Ranch Assoc does.
Why are we paying $1 per person to LWBC when nothing is being done in return?
Cut Govt red tape!
Why are we responsible for negotiating land use issues with First Nations?
Why can we not charge someone to take them from their Vancouver hotel directly to/from our rafting base?
Working on MLA with local/regional and provincial govt.
Working on long term financing options.
Deal with all the First Nations issues province wide so tenures can be secured. With no tenure, there is no long term growth.

[6] In order to ensure anonymity, verbatim comments were removed, in whole or in part, if they contained comments that could be identified with a particular respondent or business.

Assistance from HRDC Canada in bringing in foreign workers (Temporary).
I currently send my upcoming pricing to competitors, yet they still low ball. I am convinced they do not understand their real costs.
The government should work to enhance business sustainability, not hinder it.
Support companies hiring foreign guides when necessary
There is too much competition out there. It seems the gov't would like to see 12 outfitters running small ma & pa unprofessional companies rather than 4 – 5 very established, serious outfitters that have put a lot of money into their leases and safety infrastructure to give them a very professional looking outfit. The pie is cut into way too many slices. It's only so big.
Market research to identify how to best market to customers – day trips and expeditions. Cooperative marketing for rafting. Tourism literature needs to brand rafting as a safe way to enjoy scenery, learn about environment and see wildlife. Expand market from "whitewater rafting" to include family floats and ecotours.
Improve BC gov't regulatory environment. A very big impediment to creating small business.
Keep positive solutions with government
The [river] levels we can't do much about. This could be dealt with by having one government body that looks after all the concerns of adventure tourism based businesses. The rafting industry was to become more willing/open to new players in the industry. The rafting industry is made up of lots of old boys who operate only on the principle of what is good for them, and not the industry as a whole. This comment is only part true, but still applicable.
Yukon/Kluane/BC Parks consolidate their reporting/permits system.
They need to be more involved and less hostile to the operation.
Right now any motorized boat A.T.V. etc can go anywhere unless there is a law against it. It should be the other way around, ie, the opposite.
We will offer a guide training school next year.
1. Explanation of airport runway to have more direct flights available. 2. Bridges and highways vastly improved. 3. City must be more involved with tours and help out with marketing. 4. City must utilize River frontages for resort type of business instead of selling off property to big business. At the moment we have sawmills, oil co. etc, with improve top quality accommodations.
Tourism BC and its website Hello BC need to represent all sectors of outdoor businesses within Province.
Currently, this website is an accommodation search only, and is considered the last place to go for information of what's here. Check some great site www.utah.com, www.newzealand.com
Insurance – should be distinguished between type of river activity.
Tenure fees – should be size appropriate, also penalise small business. We pay same fees (taking 200 plus clients) as large business taking 1000's of people.
Possible increased government initiated marketing campaign overseas. Eg. Europe. This is an area of constraint which could benefit all areas of the province's adventure tourism industry, as it would help to direct people's attention back towards B.C.

APPENDIX D – MOST PROMISING OPPORTUNITIES

What do you feel are the three (3) most promising opportunities for your business?
2010 - BC on the world "Radar"
Airport expansion in the future?
Baby boomers
BC Tourism promoting rafting like Golf and Fishing
BC's clean water
BC's natural beauty
Becoming more diversified
Better ferry service
Bridges might be expanding to Multiple lanes
Confidential
Consistency of product
Converting more young people to the sport of rafting
Cruise ship clients *
Developing unique product offering
Domestic market - Eastern Canada
Ecotours/float trips/family trips
Euro market
Eventually being able to purchase land
Expanding product, increasing # of trips
Golden's Destination Marketing Organization
Golden's Gateway Visitor Info Site
Growing nature based tourism exposure
Growing tourism interest in the area
Growing towards 2010
Growth
Growth of Adventure Sports
Growth of Tourism in BC
Guest House expansion
Impact of 2010 on future tourism
Increase development in our area
Increase in tourism
Increasing interest in wilderness
Large untapped market
Lower gas price
Making it this far
Marketing
More people with money in Alberta
Olympics and related marketing
Operation outside BC
Our all-inclusive family adventure vacations
Our location
Our product
Our professionalism
Prime tourism destination
Provincial park (Wells Gray)
Quality of product
Regional booming market

Retail/Real estate acquisition
Some movement from local and provincial government to tourism.
Teaching courses (SWR, WFS) to agencies
UK tour ops
Using different rivers
We operate on the best whitewater river in the Jasper area

APPENDIX E – QUESTIONS, COMMENTS OR CONCERNS

S7.Q9 Are there any questions, comments, or concerns that you would like to share with us?
I see a marketing program for the rafting sector in BC as essential. However, I have concerns about some of the operators in the membership base and how this marketing "affiliation" would work.
I would support an initiative that had the backing of the BC tourism associations (eg. Tourism BC and the regional partners).
There would be too many issues involved:
-who would contribute, and how much is based on gross revenues, abilities to pay –
-who would make decisions on how dollars are spent – would require meeting and voting, and from the meetings I have attended before, consensus is not always an easy thing.
Lets get some regulations or go back to old system.
Pressure the govt to sort out tenure mess and transport mess!
Tricky questions as I am a jet boat operator. If I was comfortable that the money could be leveraged and used effectively to promote us as well and not just rafting I think it could be great. I'm a little sceptical about the group buy in, I'd want to see the plan before writing any cheques.
Thanks for your interest in the industry. Just how big an economic footprint our industry has is quite a loaded question.
From my experience the self employed are too quick to offer almost delusional statements of grandeur. So perhaps your policy research can put some realistic numbers in the hands of government.
You may also be able to access more accurate information from L.W.B.C. regarding lease numbers. These really should be public domain.
We could recognize the economic impact of this industry more, and by doing so set up some other branch of government to deal with the adventure tourism industry. This branch would be the place to do all ones dealing with the government through. It wouldn't take that much to set up and this new body of government could help the industry grow into something bigger. Thanks.
The Campbell government cut the BC Commercial River Rafting Registrar during the first term without introducing a new governing body or new commercial rafting policy. This was a mistake as the Registrar provided standards and certification requirements that helped ensure quality and safety. I closed my business based on the liberals' ill-informed decision.
The North doesn't have the support. Small touring co needs local government's support. Other businesses; no boat launches, docks, picnic areas. No historic sites developed like massarea site on the Stauart, not even a plaque for recognition. Paddle wheelers, heritage buildings, sites, fur traders, land developers, settlers, native historic villages; no effort made to disclose local areas. It seems to go – Van – Vic – Cal – Edm – White Horse. No tourist have explored the interior; travel is too difficult. Local papers seem to write about other country's destinations for holidays. Terrible hotels, terrible city center.
How about if we develop a tour destination and we have a good clientele then the Parks Land and Water ADD can come after us for land use permits and then we can afford to pay for insurance properly and then we can pay taxes Fed and Prov.
Sport fishing for salmon should be opened on both Rivers Frazer and Nechako, from Red Rock to the Bowron, from the Frazer to mouth of the Stauart, limit of 1 fish and tour operators should have grandfather for fish guiding if wanted.
RV hook ups for camping should be on the rivers as well instead of at Wal-mart

parking lots.
River based tourism in BC is falling behind the competition in both the regional (N America) and world markets.
When checking to see what our competition is doing, this is easy to understand.
We are a very small business who like to focus on personal contact, interpretation and quality. This does not seem to be feasible in long run as the government and insurance regulations and fees are all based on large volume businesses mostly based in the lower mainland. We cannot cover our fees as they set them out and would like to see more pro-rata regulations and fees. We strongly feel that the quality of our business focusing would be compromised by putting a multitude of rafts down the river like an impersonal taxi service.
Thanks for the opportunity to take part in an effort to improve on an already terrific industry – extremely vital to B.C.