

### Survey of Adventure Travel Operations in Canada, 1999

CONFIDENTIAL when completed.

Collected under authority of Statistics Act, Revised Statutes of Canada, 1985, Chapter S19.

Si vous préférez avoir ce questionnaire en français, veuillez téléphoner au numéro approprié au bas de la page.

PLEASE UPDATE ABOVE INFORM	ATION, IF NECESSARY	^
Legal Name		
Operating Name		
	<u> </u>	
Address		_<<
City	Provi	nce Postal Code
	<u> </u>	<u> </u>

### The purpose of this survey

Statistics Canada is conducting this survey on behalf of the Canadian Tourism Commission, which will use the results to produce an up-to-date and comprehensive study of the adventure travel sector in Canada. The study will profile the products and facilities available to adventure travellers in Canada, identify target and growth markets, evaluate the business environment, and explore the potential for the growth and development of the sector.

## Your participation is important

Participation in this survey is voluntary. However, your cooperation in completing the questionnaire is vital for the statistical information to be useful.

# The data you report are confidential

Statistics Canada is prohibited by law from publishing or releasing, in any manner, any statistics which would divulge information obtained from this survey relating to any identifiable business. The data reported on the survey questionnaire will be treated in strict confidence, used for statistical purposes and released in aggregate form only



#### Please complete and return this questionnaire within 10 days of receipt.

If you require assistance in the completion of the questionnaire and your province of business residence is one of the Maritime provinces, Quebec, Ontario or Manitoba, please contact the Statistics Canada Sturgeon Falls office. If your province of business residence is Saskatchewan, Alberta, British Columbia or the Territories then contact the Statistics Canada Edmonton office.

Statistics Canada - Edmonton Office Park Square - 15th Floor 10001 Belamy Hill Edmonton, Alberta

Civil Administration Centre 225 Holditch St., 2nd Floor Sturgeon Falls, Ontario P0H 2G0

Statistics Canada - Sturgeon Falls Office

Phone: 1-800-661-9884 or local (780) 495-4627 Fax: 1-800-237-5281 or local (780) 495-4788 Phone: 1-800-461-1662 Fax: 1-800-787-3161

5-4401-8643.1: 2000-09-12 STC/SBS-524-75184

Statistics Statistique
Canada Canada

T5J 3B6



# PROFILE OF PRODUCTS AND FACILITIES

A1 Please indicate the adventure travel activities offered by your company in 1999, and rank them according to revenues. (Rank the top revenue generator with a 1, and so on.)

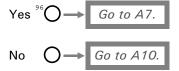
Activities offered (Mark all that apply)		Rank
Nature observation	<sup>1</sup> O	32
Bird watching	$^{2}$	33
Whale watching	<sup>3</sup> O	34
Polar bear watching	4 🔿	35
Seal pup watching	<sup>5</sup> O	36
Canoeing	6 <b>O</b>	37
Sea kayaking	<sup>7</sup> O	38
River kayaking	<sup>®</sup> O	39
Rafting	°O	40
Sailing	10	41
Scuba diving	<sup>11</sup> O	42
Catch & Release Fishing	120	43
Mountain biking	<sup>13</sup> O	44
Hiking	140	45
Mountaineering	<sup>15</sup> O	46
Trail riding (eg: horseback riding)	_ <	47
Cycling	170	48
Motorcycling		19
Spelunking/exploring caves	1.O	50
Dog sledding	>200	51
Snowshoeing	210	52
Cross-country skiing	220	53
Snowmøbiling	230	54
Ice climbing	24	
Helitours	250	56
Hot air ballooning	26	57
Hang gliding	<sup>27</sup> O	58
Cultural interpretation	<sup>28</sup> O	59
Other (Specify)	29	60
,	30	
Other (Specify)		61
,	31	62
65		

Note: Fishing, hunting and downhill skiing are not considered adventure travel activities.

A2	Did you off outdoor act	er an ivitie	y lear s in 1	ning or instructi 999?	on in
	Yes <sup>66</sup> O	ľ	No (	)	
	If yes, spec	ify a	ctivitie	es	
	67				
А3	How long hadventure t			mpany offered ities?	
	68	Yea	ars		
Α4	In 1999, du operate adv	uring Zentu	which re tra	n months did yo vel activities?	u
	<	7 HA	nonth	s <sup>69</sup> O	
70	January February March April May June		70 O 71 O 72 O 73 O 74 O 75 O	July August September October November December	76 77 78 79 80 81
А5	territories of take place?	lid yo	our ad	vinces and/or venture excursio	ons 82
	No excursion Newfoundlan		ook pl	ace in Canada ı	"0
	and Labrador	u	830	Manitoba	***
	P.E.I.		840	Saskatchewan	900
	Nova Scotia		86	Alberta	92
	New Brunswi	CK	87	British Columbia Yukon	93
	Ontario		880	N.W.T.	94
				Nunavut	95
				I	
	(				

### PROFILE OF PRODUCTS AND FACILITIES (Continued)

**A6** In 1999, did you operate adventure excursions which lasted longer than 1 day?



A7 In 1999, did your company own (or rent/lease from a third party) accommodation facilities or partner with another operator to provide accommodation as part of a package which were available to your adventure travellers?

We owned accommodations.	97
We rented/leased accommodations.	98 Go to A8.
We partnered with another operator for accommodations.	°°O
Accommodations were neither owned nor rented/leased.	Go to A10.

A8 Indicate the types of accommodation facilities which were owned or rented/leased by your company in 1999. Also indicate the maximum number of visitors per night each of these facilities can accommodate.

	\ /
Facilities (Mark all that apply)	Capacity per night
Bed and breakfasts	persons
Boats 102	persons
Cabins/cottages 103	persons
Hotels and Motels 104	persons
Lodges/Inns 105	persons
Tents 106	persons
Trailers 107	persons
Other (Specify)	persons
17	

A9 Indicate the occupancy rate (the percentage of total accommodation units available which were occupied) for all owned, rented or leased accommodations for each month of 1999.

Month	Facility closed for the month	Occupancy rate
January	118	130 %
February	119	131
March	120	132 %
April	1210	133
May	122	34 %
June	123	133
July	124	36   %
August	1250	137
September	\126 O	138 %
October	V <sub>127</sub> O	139
November	128	140 %
December	129	141

### PROFILE OF PRODUCTS AND FACILITIES (Continued)

A10 Indicate whether each of the following services was available to your adventure travellers in 1999. Also indicate whether the service was operated by your company.

	Service was available and operated by our company	Service was available but not operated by our company	Service was not available
Restaurant	142	0	0
Giftshops/ Merchandise Convenience	143	0	0
facilities (e.g. laundromat, convenience store)	144	0	0
Equipment rentals/ sales	145	0	0
Adventure travel tour guides and/or tour leaders	146	0	0
Utilities (e.g. water, electricity, showers, washrooms)	147	0	0
Luxury amenities (e.g. whirlpool, swimming pool, hot tub,sauna)	148	0	0
Intermodal trans- portation e.g. shuttle from airport	149	0<	
Value added or joint programming services (e.g. performing art, aboriginal culture gastronomy/regional cuisine)	158		0

A11 In what langua 1999? (Mark a	ages did all that a	you off oply.)	er services in
English French German Japanese Spanish Other (Specify	15: 15: 15: 15: 15:	O 10 10 10 10	$\wedge$
157	+		
A12 In 1999, what Canadian dolla sold adventure nearest dollar	excursion	on? (Ro	st commonly ound to the
A13 In 1999, what	was the	.00 duration	on of your re excursion?
d d	lays <b>O</b>	<b>R</b> 16	hours
A14 In 1999, what adventure exc			
customize needs of i travellers?	ndividual	16	9
preset?	-	l Fotal	100 9
A15 Of all adventu company in 19 included	re excurs 999, wha	ions so at perce	old by your entage
equipment	?	163 164	%
transporta	tion?	165	%
accommod	lations?		%
meals?		166	%
tour guides	s?	16/	%



#### **TRAVELLER PROFILE**

- **B1** How many traveller-days of adventure travel activities did you provide in 1999?
  - Each day spent on an adventure excursion by a traveller represents one traveller-day. If there were excursions of less than a day, then count each as half a traveller day:

For example: 10 travellers on a 3 day tour equal 30 traveller-days 10 travellers on a 3 hour tour equal 5 traveller-days.

.68		ĺ	1
			traveller-days

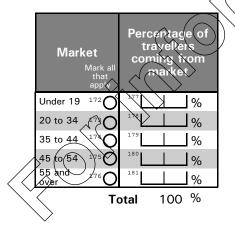
**B2** Did you notice an increase in the number of traveller-days in 1999 with respect to 1998. If so, indicate the percentage change.

	1	.70			
Yes	<sup>169</sup> O→		%	No	0

**B3** Given the number of employees, amount of equipment and capital you had, what was the maximum number of adventure traveller-days that you could have provided in 1999?



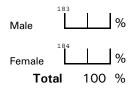
**B4** What percentage of your 1999 adventure travellers were in each of the following age ranges.



**B5** Estimate the percentage of your 1999 adventure travellers who had travelled with your company previously

182		
		%

**B6** What percentage of your 1999 adventure travellers were



**B7** What percentage of your 1999 adventure travellers were in each of the following group types.

Solo travellers	185 9	6
Couples	186 9	6
Families	187 9	6
Friends and leisure groups	188 9	6
Business and incentive travel groups	189 9	
То	tal \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	6

B8 What percentage of your 1999 adventure travellers come from each of the following geographic markets. Also indicate up to 4 markets from which you expect growth to be strongest over the next 5 years.

Market	Percentage of travellers coming from market	Growth markets
British Columbia, Alberta, Territories	190 %	208
\$askatchewan, Manitoba	191 %	209
Quebec	192 %	210
Ontario	193 %	211
Atlantic Provinces	194 %	<sup>212</sup> O
New York State	195 %	213
Michigan	196 %	214
Washington State	197 %	215
California	198 %	<sup>216</sup> O
Ohio	199 %	217
Pensylvania	200 %	218
Massachusetts	201 %	<sup>219</sup> O
Other U.S.	202 %	220
United Kingdom	203 %	221
France	204 %	222
Germany	205 %	223
Other Europe	206 %	224
Other (Specify)	207 %	225
226		

**Total** 100 %

### **BUSINESS PROFILE**

### **Advertising and Promotional Activities**

C1 Indicate which of the following marketing methods you used in 1999 to promote your adventure travel products. Indicate the percentage of your bookings attributable to each source.

Methods Used	Mark all that apply	% bookings attribu- table
brochures, posters	227	239 %
commercial travel guides	228	240 %
consumer/trade shows	<sup>229</sup> O	241 %
direct mail to future prospects	230	242 %
direct mail to past customers	231	243
e-mail promotions	232	244 %
film shows, slide shows	233	245 %
newspaper ads	234	246
other websites	<sup>235</sup> O	247
provincial/territorial travel guides	<sup>236</sup> O	248
radio/television ads	<sup>237</sup> O	249
specialty magazines	<sup>238</sup> O	250

**C2** In 1999, did you have a...

	Yes	No
e-prail	251	0
fax number	252	0
1-800 number	253	0
participant database	254	0
photo image library	255	0
website	256	0

C3 Do you provide booking commissions

Yes	No
257	$\bigcirc$

C4 Do you provide familiarization tours to:

	Yes	No
travel trade	258	0
media	259	0
other (Specify)	260	O
261		
5 In 1999, did you have any marketing activities with	y cooperativ	/e
	Yes	No
Canadian accommodati companies?	on <sub>262</sub>	0
international accommodation companies?	263	0
Canadian passenger transportation companies?	264	0
international passenger transportation companies?	265	0
other adventure companies?	266	0
industry/regional associations?	267	0
national, provincial & regional organizations	268	0
special events (e.g. trade shows, tourist info fairs, festivals)	269	0



#### **BUSINESS PROFILE (Continued)**

#### **Human Resources**

C6 Indicate the total number of employees you had working during each month of 1999? (Include contracted workers.)

Month	Full-time equivalent employees
January	270
February	271
March	272
April	273
May	274
June	275
July	276
August	277
September	278
October	279
November	280
December	281

C7 In 1999, did you use professionally certified adventure travel guides and/or tour leaders?

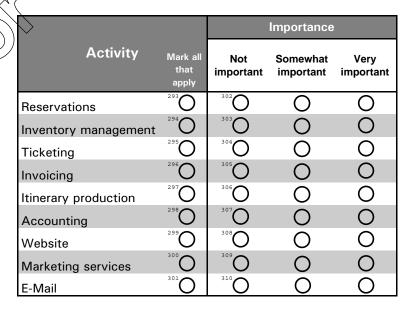
Yes	282	No	C

C8 Beyond the basic training required to do their jobs, are your employees trained by your company or others in the areas of...

,		
	Yes	No
personal safety	283	
environmental safety procedures	O	C
emergency procedures	286	
hospitality/customer service	288	
group management	289	C
heritage interpretation skills	290	
other (Specify)	291	_

## **Technology**

C9 Indicate whether you use computer technology to assist in each of the business activities listed below. For each activity which is computer-assisted, rate the importance of having up-to-date computer technology.



#### **BUSINESS PROFILE (Continued)**

#### **Financial Data**

- If you are unable to report financial data on a calendar year basis, report on a fiscal year basis.
- 2) If you are reporting on a fiscal year basis, 1999 data should correspond to the fiscal year ending no later than March 31 2000.
- 3) Estimate data which are not readily available.
- 4) Round all monetary values to the nearest dollar.

C10	Indicate the basis on which you are reporting financial data.	If you are reporting or	n ƙa	∖{fi	sca
	year basis, also indicate your fiscal year end.		//	7 ,	\

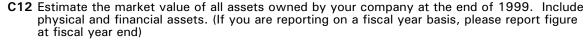
Calendar year O

Fiscal year O Fiscal year end

C11 Please provide the following income statement data for 1999.

	CALENDAR/F(SCAL YEAR
	1999
Guided adventure	\$ .00
Self-guided (equipment rentals)	\$ .00
Accommodation	(\$O)
Meals (food and beverage)	\$ .00
Merchandise	\$ .00
Other revenues	\$ .00
Total revenues	\$ .00
Total labour expenses *	\$ 0.00
Expenses on advertising and promotional activities	\$ .00
Liability insurance	\$ .00
All other expenses	\$ .00
Total expenses	\$ .00

<sup>\*</sup> Includes total payroll expenses (wages, salaries, Cost of Living Allowance, bonuses, retroactive payments, profit sharing, etc.) and Taxable Allowances and Benefits.



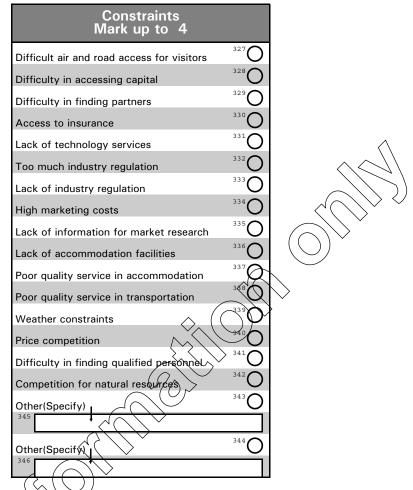
\$ 1 1 1 1 1 1 00

C13 How much did your company spend on fixed assets in 1999? (Include the purchase of new and used machinery and equipment, non-residential construction and renovations. Exclude maintenance and financing costs)

\$ .00

#### THE FUTURE

**D1** In your opinion, which of the following constraints will have the most serious impact on the long-term growth of your adventure travel business? (Mark up to 4.)



### Data sharing agreement

In order to reduce the burden on respondents, the costs of data collection activities and to avoid duplication of surveys, Statistics Canada has entered into an agreement under section 12 of the Statistics Act with the Canadian Tourism Commission to share the information gathered by this survey. Under this agreement, the Canadian Tourism Commission required to keep your information confidential and to use it only for statistical purposes.

Do you agree to share the information you have provided during this interview with the Canadian Tourism Commission?



Please provide the following information.

Name of person	filling	out o	ques	stion	nai	re													
349 Title			Ì																
Telephone		-																	
Facsimile		_			Ш														

you have any	comments about travel markets not covered in this survey?
	<u> </u>
a.ı baya anı	other comments?
you nave any	other comments?
	$-\langle \langle \langle \langle \rangle \rangle \rangle$
$\overline{\qquad}$	
	Thank you for your cooperation.
	Please return your questionnaire today.
administration only	
Status	Mail Fax Telephone  Method