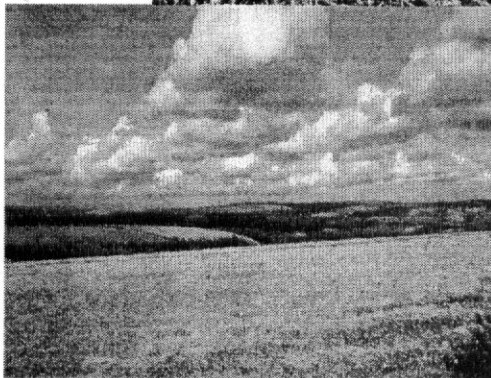


THE AGRI-TOURISM INDUSTRY IN MANITOBA:

A 1997 PROFILE OF OPERATIONS AND ISSUES



The Agri-tourism Industry in Manitoba: A 1997 Profile of Operations and Issues

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Executive Summary

Twenty-two bed and breakfast operations, 18 vacation farms, and 10 day-tour operations are surveyed from a total farm vacation population in Manitoba of approximately 80 facilities. Data on characteristics of farm sites, visitor activities, markets, advertising techniques, government programs, and barriers and opportunities to business were collected by personal interviews or mail-out questionnaires.

Facilities are concentrated in southern Manitoba in different biomes on land bases ranging from 1-4,000 acres. The average capacity for guest accommodation is eight beds. Normal annual number of domestic and foreign clients is <100 for bed and breakfast and vacation farms, but day-tour operations have >2,000 guests. Profits of facilities with overnight accommodations generally are <\$5,000, but incomes from some operations exceed \$30,000. Free advertising supplied by Travel Manitoba is appreciated most by operators, but owners also are associated with and receive services from other government agencies.

Respondents indicate that the main difficulties encountered are unpredictable weather, a lack of clientele, the need for facility development, and government regulations. They also indicate that the rural landscape, wildlife, local social events, few cultural or economic barriers, and government support create opportunities in the agri-tourism industry.

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INTRODUCTION

Agri-tourism describes economic activity between tourists and farm operators (Murphy 1985). The three primary types of rural experience provided are farm accommodations, farm vacations, and farm tours. Accommodations involve overnight stays either in bed and breakfast operations in the family home or in detached cabins or camp sites. Farm vacations develop better tourist-host relationships because the guests stay longer and often are involved in agricultural activities. Farm tours are day excursions during which the operator provides educational experiences in agricultural techniques or facilities, or provides farm produce directly to the tourist.

Globalization and international competition are causing restructuring of the agricultural industry in Canada into either highly specialized monocultural practices or diversified units, both of which may create economic stability. Many farm families find it necessary to work off-farm or to derive additional income from farm-based enterprises such as tourism. The agri-tourism market has developed because urban society is becoming interested in solitude and the nostalgia of rural living. Also society has developed an increased interest in environmental awareness (Knill 1991) and travellers are selecting "life enhancing" experiences rather than "fun in the sun" holidays (Gordon 1991). Holidays in a rural setting help satisfy these interests.

The economic circumstances of many urban residents result in expansion of the farm vacation industry. Wages and salaries in urban manufacturing and service industries has been relatively constant in recent years and fewer individuals have sufficient discretionary income to afford international vacations. The World Tourism Organization estimates that domestic tourism is 10 fold that of out-of-country holidays (Lane 1994). This is due, in part, to the economic situation. Relatively inexpensive farm holidays provide escape from cities and overcrowded resorts and insight into environmental issues, farming, and rural lifestyle.

Tourism is presently the world's largest industry (Goodwin 1996). In 1994 the World Tourism Organization estimated the tourist population to be 532 million, with an increase to 661 million by the year 2000. The tourism industry in Canada generated \$21 billion in revenue and supported more than one million direct or indirect jobs in 1987 (Dykeman 1989). By 1995, the total revenue had increased to \$41.8 billion (Canada Tourism Commission 1996).

The Manitoba tourist industry generated \$662 million in 1987, with 34% of the revenue in the hospitality sector. Estimates for 1994 are \$1.1 billion (Travel Manitoba 1996). No information is available on the importance of farm stays compared to total hospitality revenue, but room demand in rural Manitoba increased 7.6% during 1994.

Agri-tourism is one of the most rapidly growing components of tourism in Europe. While the farm vacation industry has existed for more than 100 years (Frater 1983), significant growth has been recorded only since the end of World War II. Agri-tourism in France increased from 145 to 28,000 units between 1950 and 1980 (Murphy 1985). In Spain growth was more than 20 fold during the 1967-1977 decade (Dernoi 1983). In Austria, where the farm vacation industry leads all industrialized nations, farm accommodations represent one-sixth of the total tourist beds (Embacher 1994).

Farm holidays in North America are not as popular as in Europe. In the United States in 1967, there was an estimated 2000 farms offering vacation packages (Vogeler 1977). Rapid growth has occurred recently. For example, Bryan (1991) noted an increase in holiday ranches and farms in a tri-state region of the northwestern states, which increased from a "handful" in 1985 to between 70-90 units by 1990. In Canada, Shaw and Williams (1994) estimated the total number of farm vacations to be approximately 700. There were about 150 vacation farms in Quebec in 1980 (Moulin 1983). In the sparsely populated, but agriculturally dominated province of Saskatchewan, there were 83 operators during 1985 (Saskatchewan 1995).

Little is known about the farm vacation industry in Manitoba. Studies by Weaver et al. (1995, 1996) provide information about eco-tourism in the province but do not directly examine agri-tourism. The purpose of this

research is to construct a profile of Manitoba's approximately 80 rural vacation facilities and their markets. The data collected will provide an estimate of the present status of the industry, help identify existing and potential problems, and indicate future opportunities for sustainable growth.

Methods

A list of operators having bed and breakfast, farm vacation, or day tour facilities was created from names cited in the 1996 and 1997 Manitoba Accommodation and Campground Guide, the Country Vacation Association membership, the Manitoba Bed and Breakfast Association membership, and independent operators known to the Director of Agri-Ventures for the Manitoba Department of Agriculture. Only operators with tourist facilities outside village, town or city limits were included (Figure 1).

To minimize travel costs, operators were divided into regional groups that could be interviewed during a single excursion. Initially, owners were contacted by telephone to request voluntary participation in the study. At that time they were informed that all information provided in the survey would be treated confidentially, their anonymity guaranteed, and that questions they felt were too personal could be left unanswered. Distant, isolated owners also were told that they would not be personally interviewed but would be sent a survey package. The survey package contained a covering letter, pre-paid return envelope, and the six page questionnaire. Sixteen surveys were mailed out. Other participants were asked to schedule a personal interview at their premises. In general, appointments were made approximately 7-10 days in advance. All survey questions were completed between mid-February and April 30, 1997.

The questions on the survey (Appendix A) were designed by the authors with comments and suggestions provided by members of Manitoba's Departments of Agriculture and Industry, Trade and Tourism, and the Country Vacations Association. Information requested included 1) farm site characteristics, 2) visitor activities, 3) markets, 4) advertising, 5) economics of operation, 6) government programs, and 7) barriers and opportunities facing the business. Many of the questions were open-ended to permit the opportunity for respondents to provide information they deemed relevant. The over-all design was similar to the Manitoba eco-tourism study by Weaver et al. (1995, 1996) and that completed by Fennell and Weaver (1995) on vacation farm activities in Saskatchewan.

The Agri-tourism Industry in Manitoba

A total of 86 "farm vacation" operations were identified in rural Manitoba in 1997. Efforts to contact seven businesses were unsuccessful. Of the 79 that were contacted, six indicated that they were not interested in the study, seven declined participation because they were discontinuing their operation, and three owners stated that they were just starting and had no data. A total of 63 owners agreed to become involved. Among the 16 isolated operators who agreed to participate and were mailed the survey package, six completed and returned usable questionnaires. Forty-seven operators agreed to be interviewed but four failed to keep the appointment. Consequently, a total of 50 completed questionnaires are available for analysis. These represent 18 vacation farms, 22 bed and breakfast enterprises, and 10 day-tour operations. Not all questions were completed by all respondents, resulting in variation in sample size.

The distribution of surveyed businesses covers the area between the Sandiland Provincial Park and the Saskatchewan/Manitoba border (Figure 1). The region was bounded on the south by the Canada/United States border, and on the north by a line approximating to the 52nd parallel. Most respondents (76%) had sites within 100 miles of the American border. Of the 79 businesses contacted, 46 (58%) were located in the western half of the province.

Site Characteristics

Twenty-six of the 50 respondents were located in the prairie biome, 27 in the parklands, and six in the boreal forest. Several had two representative areas of biomes on their land base. Most agri-tourism operators had wetlands on their properties. Fifty-two percent had marshes, 42% had rivers or streams, and 20% had lakes either on their premises or nearby to attract clients to their facilities. Only one of the operations was situated in wilderness, but 17 classified their location as semi-wilderness. All others were located on prairies modified by agricultural practices.

Most agri-tourism operators have other occupations. In addition to the tourism component, 38% were involved with mixed farming, 16% raised livestock, and 14% were primarily grain farmers. Thirteen operators indicated that they had an "other" agricultural activity. These included tree farming, boarding horses, gardening and outfitting hunters. Only five operators worked solely in the tourist trade. Owners of two facilities were retired or semi-retired and augmented their income with tourist activities.

The size of properties supporting agri-tourism operations ranges from less than an acre to 4000 acres (owned or rented). The median was 320 acres. Four operators had leased holdings in addition to owned land.

The 10 operators in the day-tour business had no overnight accommodations. Twenty-one of the 40 operators with accommodations had clients stay in their main residence. Five owners used only guest cabins or cottages. No owners used campsites exclusively. Combinations of accommodation did occur as three operators had all three types of facilities for clients, five used their residence and campsites and four used cabins and campsites. Although the owners of 16 facilities indicated that there was space for tenting or trailer parking, only one had serviced campsites with water, electricity, and fluid waste disposal systems for larger trailers and mobile homes.

The number of beds for guests at a single vacation farm or bed and breakfast operation ranged from 4-34. The average number of guests that could be accommodated at a facility was eight. The average number that could be accommodated at vacation farms was 10 while the average in bed and breakfast facilities was seven. If the 10 known day-tour operations are removed from the estimated 80 farm vacation units, and the average number of beds is used as a multiplier, the accommodation capacity would approach 450 tourists per day. Only three respondents indicated that they had self contained cabins where guests prepared their meals. Other operators provided some or all meals in their main residence. The majority of bed and breakfast owners provided only breakfasts, but a few did provide other meals upon request and at additional costs.

Many units had special facilities for their customers. Sixteen of the 50 businesses could accommodate partially handicapped guests (none were completely adapted for wheelchair clients). Two-thirds of the operators had educational materials such as books, videos, or species checklists for clients' use.

Most operators (70%) plan to improve or expand their facilities within the next five years. Six owners plan to add cabin(s) and three to add rooms (such as bedrooms, bathrooms, or large common rooms) to their homes. One owner plans to add trees to his yard while another plans a screened gazebo.

Visitor Activities

The most common comment made by clients to the owners of agri-tourism operations was that they enjoyed the physical surroundings. Other common comments were the pleasures of solitude for relaxation, hospitality, meals, domestic animals, accommodations, and farm activities. Accordingly, guests at rural vacation facilities had a wide variety of interests and activities (Table 1). The most important activity was viewing nature. Thirty-one operators stated that it was of major importance and no owner indicated that viewing flora or fauna was a totally unimportant activity. Other important guest pastimes included viewing wildlife, viewing farm

work, hunting, photography, and learning about rural society. Fishing, boating, snowmobiling, horticulture, and horse-related activities have the least guest involvement.

There were 22 “other” activities listed in the survey as either major or common. The most frequently cited were golfing, farm tours, dinner parties, retreats and seminars, evening campfires, and special celebrations such as anniversaries, birthdays, and honeymoon holidays. Twelve different activities were cited only once, and range from kayaking to granary demonstrations.

Table 1. Relative importance of rural activities to guests of agri-tourism businesses

Activity	Importance			
	Major	Common	Minor	None
Viewing Nature	31	16	3	0
Viewing farming activities	15	13	9	13
Doing farm work	1	3	17	29
Horticulture	2	8	8	32
Viewing wildlife	20	17	12	1
Boating	5	4	6	35
Cycling	1	7	19	23
Hiking or skiing	9	15	12	14
Photography	10	16	16	8
Snowmobiling	3	5	7	35
Education or research	10	6	12	22
Cultural tourism	4	7	12	27
Hunting	12	4	5	29
Fishing	4	5	4	37
Horse related	7	6	3	34
Other	11	11	2	26

Birds and mammals are the two most important groups of animals involved in wildlife viewing (Table 2). Operators indicate that seeing mammals (wild or domesticated) was of major importance for 34% of the clients and viewing birds was important to 48%. Only one operator listed mammals as a “none” activity for their tourists and two owners cited bird watching as of no interest to guests. Plants were more important than fish, amphibians, reptiles or invertebrate animals, but flora was not rated as high or listed as often as birds or mammals.

Table 2. Relative importance of flora and fauna to clients of agri-tourism business.

	Importance							
	Major							
	No.	%	No.	%	No.	%	No.	%
Mammals	17	34.0	17	34.0	15	30.0	1	2.0
Birds	24	48.0	14	28.0	10	20.0	2	4.0
Fish	4	8.0	2	4.0	7	14.0	37	74.0
Plants	10	20.0	10	20.0	15	30.0	15	30.0
Other	1	2.0	2	4.0	6	12.0	41	82.0

Deer, elk, and moose generate the most interest for tourists, with these mammals listed in 30 of the 50 surveys. The frequency of other mammals recorded include domestic animals (18), rodents (13), canines (10), bears (4), rabbits (3), and raccoons (1). The groups of birds listed most often are song or perching birds in 24 surveys, waterfowl (16), raptors (13), upland game birds (5), hummingbirds (5), woodpeckers (2), and pelicans (2). Four other groups of birds were recorded once and ranged from herons to domestic farm fowl. The fishes most noted on the questionnaires were walleye, pike, perch, catfish, trout, carp, and bass. While seven surveys cited walleye, the frequency decreased to one for carp and bass. Under the category of “other wildlife”, four respondents recorded reptiles (turtles and snakes), three recorded amphibians (frogs and toads), and one mentioned insects (butterflies, ants, and mosquitoes) as being of interest to their guests.

Wild flowers are the most important plant group and were recorded on 13 questionnaires. These were followed in decreasing frequency by cultivated flowers, trees, gardens, and agricultural crops. Cactus, edible plants, berries, and water plants were noted on single surveys.

When respondents were asked to give the most important activity of their guests, 17 of 50 report it to be relaxation in rural solitude. Ranking second at six citations each are nature watching and horse-related activities such as hay rides and horseback riding. These are followed by petting farm animals, touring, hiking, hunting, and dinner parties. Recorded on single surveys are retreats, hot tubbing, boating, viewing flower gardens, beds for the night, snowmobiling, and a wild west show.

When respondents were asked to list the single most interesting plant or animal group for their clients, 14 list domestic farm animals, while 10 of the 50 enterprises record members of the “deer group”. Bird watching and horse-related activities are recorded on ten and six surveys, respectively. Of lower ranking are gardens and flowers (4), trees (3), wild prairie grasslands (2), and fish (2). Having a single recording are cactus plants, upland bird hunting, bears, and viewing canines such as wolves, coyotes, and foxes.

Clientele, Markets and Advertising

Individuals who take rural vacations in Manitoba originate from both domestic and international markets. When data from all three components of the agri-tourist industry are grouped, survey respondents indicate that 79% of the total clientele is Canadian. Only five of the 50 operators dealt exclusively with foreign clients, and approximately one-half of the owners state they had hosted out-of-country guests. Twenty-three owners report local clients (within a 50 mile radius of their facilities), and local visitors provide about 46% of business. Thirty-seven operators had guests from Manitoba (including local clients), with the provincial component forming 58% of the total clientele.

Although the foreign market ranges between 0%-100% for agri-tourism businesses, average values for those that entertain non-Canadian guests is 15% of total visitors. Americans are the most common guests followed by Asians, Europeans, and Australians.

Variations in clientele occur among vacation farms, bed and breakfast units, and day tours. More than 90% of day-tour clients are local Manitobans and less than 2% come from out-of-province. Seven of the 10 day-tour facilities record no foreign visitors. Seventy-eight percent of the bed and breakfast market and 75% of that for vacation farms is Canadian. Approximately equal numbers of Americans and Europeans are recorded for bed and breakfast operations, followed by Asians and Australians. Americans are the most common non-Canadian visitors at vacation farms.

The number of visitors recorded for all components of the agri-tourism industry has varied during the past six years. During the period 1991-1996, the estimated annual number of guests per facility ranged between 1-30,000. The averages for these years are 784, 948, 753, 875, 725, and 1,294, respectively. The corresponding medians, which are not influenced by extreme values, are 50, 240, 87, 140, 61, and 67.

Data from 44 respondents for the past two years indicate differences among the three components (Table 3). For example, owners of day tours have noticeably more clients than either vacation farms or bed and breakfast operations. Realistic average numbers for the last two components range between 40-80 guests.

Table 3. Data on number of clients for the three agri-tourist components for the past two years in Manitoba.

	All Components		Vacation Farms		Bed and Breakfast		Day Tour	
	1995	1996	1995	1996	1995	1996	1995	1996
Range	1 - 4,000	4-30,000	1 - 300	4 -1,100	2 - 1,800	6 -30,000	500 - 4,000	20 - 5,000
Mean	725	1,294	82	150	241	1,659	2,871	2,557
Median	61	67	40	42	60	40	3,115	2,000

Summer is the most important season for the Manitoba agri-tourism industry. Grouped data indicate that approximately 50% of all clients are hosted during summer. Operators hosted about 20% of their clientele during autumn and the remaining 30% is divided equally between spring and winter seasons. Vacation farms have similar spring and summer percentages to the grouped averages but autumn increased to 25% and winter dropped to 10%. The annual seasonal distribution of guests for bed and breakfast operators is approximately 10%, 60%, 20%, and 10%, respectively. Owners of day-tour facilities record about 40% for both spring and summer with the remaining 20% divided equally between autumn and winter.

These percentages reflect overall trends because many facilities are seasonal. For example, day tours for school children generally occur during May and June and several owners are open only for these two months. Many bed and breakfast units are open to the public only during the period May to October. Some rural vacation operators who specialize in winter sporting activities or dinner parties, are open for guests only during the snow-covered period.

The percentage of clients who are repeat guests depends on the length of operation of the business. Operators who began their business in 1996 had no or few repeat visitors during the first year of operation. Of the 37 owners who had repeat clients, the estimated percentage ranged between 3%-90%. The average for operators who have been in the industry for three or more years is estimated to be between 25%-33%.

The length of stay of rural tourists varies with the type of facility. One-hundred percent of day-tour units have guests for less than one day as they have no overnight accommodations. When data from vacation farms and bed and breakfast facilities are grouped, about 50% of all guests stay for one night. The estimates for 2-3 nights are 25%, 4-6 nights 15%, and 7-plus nights 10%. Estimated percentages for vacation farms are 35% for overnight, 40% for 2-3 nights, 20% for 4-6 nights, and 5% for a week or more. Estimated values for bed and breakfast facilities that permit longer stays are 60% overnight, 20% for 2-3 nights, 15% for 4-6 nights, and 5% for 7-plus nights. There are four vacation farms and seven bed and breakfast operations that have facilities suitable for day trips, and day-trip clients form about 40% of their total annual clientele.

Although females account for 51% of all rural guests, percentages between 20%-90% are recorded for individual operations. The ratio of female to male visitors is related to activities provided at the facility. For example, where horse-related activities are promoted, the female ratio approached the upper range, but where hunting was involved, the ratio approached the lower limits.

Percentages of clients in different age groups at a facility varies widely and depends to a degree on the activities promoted. School day tours have up to 98% of the visitors less than 18 years of age, while owners of some bed and breakfast homes do not permit children. Some vacation operations target the seniors market and those over 60 years of age could account for two-thirds of their clientele. When data from all respondents are grouped and values taken to the nearest 5%, the results are as follows: 18 years or less = 20%; 19-40 years = 30%; 41-60 years = 35%; and more than 60 years = 15%.

Sixty percent of all agri-tourism business occurs on weekends, but this average varies with the facility. Some day tour operations that specialize in tours for school children have values of less than 5%, while other owners have 100% of their clients on weekends.

Many operators target specific groups of clients. For foreign visitors, seniors, or those without transportation, 18 of the 50 owners provide transport to their facilities. Thirty-nine operations cater to groups such as school tours, clubs, seniors, hobby groups, church camps, weddings and anniversaries, service groups, craft groups, artists, and family reunions. Owners who are fluent in more than one language target international or ethnic visitors who might have difficulties with English. All agri-tourist operators in Manitoba could speak English. There were five owners who spoke both English and French, five who spoke English and German, three who could communicate in English, French and German, and one who spoke English, French, German, and Ukrainian. There are single operators who could communicate in Spanish, Italian, Greek, Icelandic, and Ukrainian.

The agri-tourism industry in Manitoba is relatively new. Twenty-eight percent of the respondents began last year (1996) and 56% began since 1993. Only three respondents interviewed had some form of agri-tourism operation prior to 1984. The oldest started in 1973.

A wide range of reasons are given by respondents for becoming involved. Thirteen owners state that they are interested in meeting people, 12 wish to utilize unused accommodations, and 10 report that their motivation is financial. Less frequently cited reasons are agricultural diversification, self employment, promotion of farm life for urban folk, something to do in retirement, or to display their hobbies to others.

Because most operators have limited experience with both tourism and the techniques of advertising, not all avenues of promotion are used. However, all owners do advertise their business in publications either directly or through provincial government promotion. Most operators (48 of 50) agree that the most effective advertising was "word of mouth". They believe that providing a quality rural experience at a fair price guarantees tourists. More than 80% of the facilities are listed in magazines such as the Manitoba Accommodation and Campground Guide.

The next three techniques most commonly used (listed in order of importance) are (1) associations, networks, and trade shows, (2) direct mailing or posting of listings and brochures, and (3) signage (stationary

or portable road signs). Approximately 40% of the operations are listed on the internet either directly with their own page or through an association. Nineteen owners are using or have used local newspapers, seven have used tour wholesalers, six have used radio promotions, and three have utilized television advertising. Four operators cite other means of advertising including home video, audio, or poster productions.

Less than one-quarter of the operators are networking with other owners to reduce advertising or time costs. One of the largest and most cited networks is the South East Tourism Network in the southeastern region of the province. Five operators list informal affiliations with other members of the Country Vacations Association. An example is the Manitoba School Tour Network near the City of Winnipeg. Other networks listed by single respondents are the Manitoba Home Based Business Network, Manitoba South Interlake Network, and Manitoba Wilderness Horse Outfitting Association. One respondent has a small network of fellow members from the Manitoba Bed and Breakfast Association.

Eleven operators have formal training related to the tourism business, but none have enrolled either in programs similar to the two-year diploma in tourism commonly offered at many community colleges, or attended university courses in hospitality and hotel management. Some have university courses in business, agriculture, home economics, and natural resource management which benefit their operation. Nearly 80% of the operators have attended meetings, seminars, or workshops related to tourism.

Thirty percent of the operators have no affiliation with a tourist association. Reasons for not joining varied. Five owners indicated that they could not afford to pay membership fees. Three respondents stated that associations are not aggressive in promoting the industry. Two operators were "new to the business" and may join organizations in the future. One respondent said that there was a lack of professionalism among some association members and that they would not be affiliated with the groups. Two other reasons cited are that the associations knew little about the activity being promoted, and that governmental agencies "provided everything needed".

Reasons given for membership in associations and their corresponding frequencies are as follows: 1) advertising and marketing (44%), 2) getting tourism information and learning from others (26%), 3) and getting group insurance (16%). Reasons less frequently cited include cooperative problem solving, establishment of industry standards, and group credibility. One operator had just purchased the business and wanted to continue the previous owner's procedures.

Economics of Agri-tourism in Manitoba

The three major components of the economics of a business are income, operating costs and time involved. Results from 47 respondents (all data grouped) indicate that gross income ranges from a few hundred dollars to well over \$30,000 per year. Thirty-two respondents grossed less than \$5,000, four owners earned \$5,000-\$10,000, two made between \$10,000-\$20,000, four between \$20,000-\$30,000, and five operators grossed more than \$30,000. By taking the mid-point of the class interval and multiplying it by the number of owners in the interval, a weighted average of approximately \$10,000 per operation was calculated. This average is skewed by operators with high incomes. Calculation of the median indicates a value of less than \$5,000.

Five operators depend on tourism for their entire income, but the other 45 owners have additional sources of revenue. For the latter owners, the monies received from tourists range from 1%-90%, when compared to their total annual income. The average was less than 20%.

Differences in income are reported among the three agri-tourist components. Seventeen bed and breakfast operators report less than \$5,000, two owners between \$5,000-\$10,000, one between \$10,000-\$20,000, and one more than \$30,000. Using the same procedure as described for the grouped data, the mean for these facilities is \$4,850 and the median is \$2,500.

Data for vacation farms indicate 11 owners earning less than \$5,000, two between \$5,000-\$10,000, none between \$10,000-\$20,000, two between \$20,000-\$30,000, and two more than \$30,000. The average and median for vacation farms are approximately \$8,940 and \$2,500 respectively.

Four day-tour operators earn less than \$5,000, none between \$5,000-\$10,000, one between \$10,000-\$20,000, two between \$20,000-\$30,000, and two more than \$30,000. Both the calculated average and median for the day-tour operators are \$15,000.

Estimated operating costs for grouped data, including advertising, licenses, insurances, salaries, and food for guests, range from \$200-\$120,000. The average and median values for these costs are \$12,491 and \$1,750. When the three components are separated, the operating expenses for bed and breakfast, vacation farms and day tour operations range from \$200-\$2,000, \$200-\$80,000, and \$200-\$120,000 respectively. The estimated average and median values for bed and breakfast units are \$2,786 and \$900. For vacation farms the average and median values are \$1,150 and \$1,500, and for day tours the calculations are \$27,880 and \$5,000. Many owners state that the operating costs are approximately 50% of the gross income regardless of the type of agri-tourist component.

The time spent on tourism compared to total agricultural activity ranges between 1%-100%. The 1% value was recorded from a large farm operation that had just started the tourism business and had few guests. The 100% was recorded for five operators who work full-time on the tourist trade. Average and median values for time expenditure are 32% and 20% respectively.

Nineteen of 50 owners surveyed (38%) hire staff on a part or full time basis. The maximum number of staff hired by a single operator is 15, which included both full and part-time employees. The most full-time employees hired by a single operator is three. Four operators hire staff year round, eight for the summer, and two during spring. No part-time staff are hired for the autumn or winter.

Costs of overnight accommodations depend on the services provided. When no meals are provided (self-contained detached cabins) the costs range from \$20-\$65, with an average cost of \$35 per day. The same charge occurs for single or double occupancy. The cost of a bed with breakfast for a single occupant ranges between \$20-\$45 (average \$33) and for double occupancy the range is \$35-\$60 (average \$45). Based on data from only seven operators, an all inclusive per day package of bed and meals ranges from \$50-\$143 (average \$70) per person. One operator charges \$85 per couple per day for bed and all meals. For families with children, an average additional charge of \$10 per child is added. When additional meals are requested, the average charge is \$10 per meal per person (range \$5-\$15).

The cost per person ranges from \$3-\$20 for guests at a day-tour operation. The more expensive packages include food such as that served for evening dinner parties. The costs for a day visitor who tours a working farm range from \$3-\$5 (average \$3.75). The cost for an overnight campsite ranges between \$2-\$10 (average \$7). The more expensive sites provide some services.

When asked whether or not they would expand their tourism operation, all owners indicate that they would invest more for some type of development. Thirty-seven report that they would improve their facilities. Six owners want to build cabins. Others would add bedrooms, bathrooms, or common-rooms for guests. Single responses include adding a screened porch or gazebo, and planting more trees in the yard. Other plans include promotion (18 owners), equipment (11), services (5), and land (4). Owners often indicated several areas for improvement.

The Impact of Government Programs on Agri-tourism Operations

Other than Travel Manitoba, few agri-tourism operators have much contact with government departments or agencies. The two largest agri-tourist operations in Manitoba (with respect to guest numbers) had contacted

a total of 10 and seven different federal or provincial agencies respectively. All other owners had five or fewer contacts and one operator recorded none. The distribution from five to none was: 2, 11, 17, 8, 9, 1.

The two agencies cited most frequently by respondents are Travel Manitoba and the Manitoba Department of Agriculture. Forty-four owners (88%) have contact with Travel Manitoba for free advertising, and 64% of these indicate that this agency is the most helpful area of government for their businesses. However, few operators are aware of other forms of assistance as only 13 are familiar with Travel Manitoba's marketing plan and opportunities information. Twenty-four owners (48%) have some contact with the Manitoba Department of Agriculture and 10% record this agency as most helpful to their business.

Whereas respondents cite only advertising and tourist information as Travel Manitoba's functions, different reasons are given for contacting the Department of Agriculture. Seventeen respondents directly or indirectly cite the workshops and personnel of Agri-Ventures as important because they provide business information, assist with problem solving, and provide a venue to meet other operators. Three operators indicate that the department helped them with marketing.

The next three governmental agencies most cited are Manitoba Industry, Trade and Tourism (18 citations), Prairie Farm Rehabilitation Administration (15), and Manitoba Department of Natural Resources (13). Industry, Trade and Tourism assists by means of promotions, seminars, grant applications, business plans, and registration of business names. PFRA helps with dugouts, wells, and by providing trees. Natural Resources assists with hunting and guiding licenses, promotion of hunting, habitat control, wildlife management, and by providing information on wildlife preserves. Ten percent of the respondents indicate that Industry, Trade and Tourism is the most important agency for them, but values drop to 5% and 2% for Natural Resources and PFRA, respectively.

Fifteen operators have contact with their municipal governments. The reasons centre primarily around regulations in local by-laws related to starting businesses, road upgrading and maintenance, signage, rezoning, expansion of land base, licensing and brochure distribution. Most owners find municipal governments to be supportive of rural business ventures.

Manitoba Rural Development, Manitoba Environment, and the Canada-Manitoba Tourism Agreement each received three citations. Contact with Rural Development concerns meetings and applications for financial grants. Manitoba Environment inspects kitchen and bathroom facilities. The Canada-Manitoba Tourism Agreement provides information about trade shows and promotion, funding of expansion, and literature on tourism. Two operators have contact with the Licensing Advisory Committee. One owner approached the committee about an outfitters license and another about a liquor license. Seven respondents cite the following "other" agencies: Manitoba Department of Forestry, Farm Credit Corporation, Parks Canada, Regional Development Corporation, Culture and Heritage, Canadian Wildlife Service, and Partners with Youth.

Barriers and Opportunities to Agri-tourism

The 10 questions in this section of the survey are open-ended to give respondents the opportunity to express positive and negative experiences relative to their tourism operation. One operator did not respond to any of the questions and another commented on only one. Most owners commented on three to six inquiries but few gave responses to all questions. Some owners recorded several answers to a single question.

Natural Factors

Weather hampers the tourism businesses. Thirteen operators report that rain, snow (or lack of snow), wind, and cold negatively affect guest numbers. Nine operators list distance as a problem, believing that they are too distant from a market area, a major traffic route, or an international airport. Road conditions, especially in winter, are a difficulty for five respondents. Two individuals list the lack of nearby rivers or lakes as a

negative effect on business because many tourists like aquatic environments and activities. One owner reports a problem with the over-abundance of mosquitoes. Twenty-six respondents indicate that there are no environmental problems.

Twenty-six businesses report that their tourist trade is positively influenced by the landscape. This includes federal or provincial parks, valleys, hills and sandilands caused by ancient glacial activity. Fifteen report that proximity to lakes, marshes, and rivers provides an attraction for guests and six other owners state that open prairie with its space, sunsets, and natural grasslands is an attraction for clients. Abundance of wildlife, especially mammals and birds, is cited by 13 respondents. One operator states that the presence of a nearby mine for extracting minerals is an attraction.

Social and Cultural Factors

Few cultural or social barriers hamper the agri-tourist business in Manitoba, as 42 operators indicate that they have no difficulties. Two owners state that there are some minor problems with extreme environmentalists and/or animal rights groups. There also are two respondents who have difficulties with neighbours. In one situation the neighbours are against rezoning for the tourism business and, in the second situation, neighbouring businesses are concerned with competition. Two operators are opposed to hunting in their area. One individual is apprehensive about the use of high-powered rifles on adjacent land and the second is concerned about poaching. Other barriers recorded by a single respondent each are that Manitoba is not seen as a tourist province and that the Asian market has tourists who prefer to travel in groups too large to be accommodated by most rural facilities.

Opportunities for agri-tourist operators arising from cultural or social activities generally relate to local attractions such as fairs, festivals, and sporting events, or because the facility is a part of a larger recreational region. Thirty-one respondents cite these types of situations and three owners report tourist "spin-off" from neighbouring Aboriginal, Icelandic, or Hutterite communities. Nearness to archaeological digs and downhill skiing are cited by two operators. Additional cultural opportunities recorded are proximity to major urban development, rural hospitality, return to rural roots, attraction of old houses, and the sense of safety for women at the family-operated facilities. Twenty respondents report that cultural or social opportunities are not an influential factor on their business.

Government-related Factors

Fifty percent of the respondents surveyed cite some type of government action or inaction that hampers businesses. Eight operators who promote hunting have difficulties with regulations. The problems relate to potential loss of tourists from proposed federal gun laws, restrictions of non-resident licenses, and the "red tape" forced on non-resident (basically USA) hunters. The cost of public liability insurance is cited by seven respondents. Owners of vacation farms and day-tour facilities are especially concerned because agricultural activities such as those involving horses can be dangerous for visitors.

Regulations, by-laws, and costs imposed by provincial or municipal governments for road signs that promote their businesses are listed by seven operators. Three operators feel that regulations and/or policies of nearby parks hamper agri-tourism. Policies for municipal taxation on rural buildings and high federal and provincial sales taxes are recorded by three owners.

Three respondents mention that the excessive paperwork required for government permits and grants prevents some owners from making applications that might enhance business. Two owners believe that government departments must have clear mandates and policies regarding tourism. Furthermore, these departments must liaise with each other to prevent obstacles for tourism operators. Two other respondents feel that government should not operate tourism facilities and be in direct competition with the private sector

because government has an unfair advantage by using public monies to support their operations. One operator mentioned that many bureaucrats assigned to tourism have never been to a rural facility and cannot relate to small vacation farms. Other difficulties cited by single respondents relate to health inspectors, municipal zoning regulations, "dry" municipalities, and the possibilities of government regulations for future accommodation standards and the passing of an Endangered Species Bill that might affect the land holdings of some operators.

Positive government actions that promote agri-tourism are reported by 27 of the 50 people surveyed. Sixteen respondents are grateful for the advertising efforts of Travel Manitoba, and an additional four list the positive efforts of all government promotion for agri-tourism. Eight respondents acknowledge government agencies that provide financial support. In particular, three people note past grants to the Vacation Farm Association, two praise the summer student work programs, two list the loan guarantees of the Farm Credit Corporation, and one operator lists a Sustainable Development Grant. Government sponsored workshops are cited by four respondents, and four owners acknowledge the positive influence to their business from nearby federal or provincial parks. Other opportunities recorded by individual owners relate to free flags, provincial highway signs, access to specialized personnel who provide business information, and the Canada-Manitoba Tourism Agreement. One owner is grateful for the advertising efforts of a town council.

Economic Barriers

Approximately 30% of the respondents provide comments on economic barriers or opportunities that affect their businesses. Two of the most important barriers relate to money-lending institutions and the high cost of capital investments. Seven owners indicate that loan managers are familiar with traditional agricultural practices but do not understand the needs or realize the potential of tourism. Four owners cite concerns about the economic uncertainty of the tourism industry relative to the financial payback on expenditures for equipment, as well as expansion or improvements to existing accommodations. Two day-tour operators state that cutbacks to school budgets negatively affect business because fewer children attend their facilities. Individual respondents record promotion costs, signage costs, and high taxation rates as hampering business. One operator indicates that it is difficult to keep updated with the rates of exchange on foreign currencies.

Economic Opportunities

Twelve respondents comment on economic opportunities. The most common economic opportunity reported is the present Canada-USA dollar exchange rate which permits relatively cheap holidays in Manitoba. Other opportunities relate to policies of private or public agencies that provide self-employment assistance. Examples given are financial support from local banking institutions and the Farm Credit Corporation, special taxation rates for small businesses, and partnerships with cottage industries.

The attitudes and working relationships of agri-tourism operators towards others in the industry vary. Thirty-four respondents indicate that other facilities are located nearby. Sixteen respondents have little or no interaction with other operators. Five owners report that these "competitors" hamper business through pricing and visitor dilution. Two operators believe that others in the industry have both a hampering and assisting effect. However, 21 of 44 respondents believe that colleagues assist business by forming functional marketing networks, creating a larger recreational area with diversified tourist activities, and by forming groups for solving problems related to the industry.

A few respondents cite obstacles in the industry that are not mentioned previously and are not related to survey questions. One operator reports that continuously hosting visitors in the home causes personal strain on family relationships. They found they need short periodic "breaks" from guests to re-establish family ties. Another operator states that hosting clients creates extra work, and that over time the physical and mental demands may cause "burn-out".

A Perspective on Agri-tourism in Manitoba

The exact number of farm vacation facilities that exist in Manitoba during 1997 is not known. The initial list composed of 86 businesses was prepared by an extensive search, but it is not current as it was created from information published from the two previous years. A few additions to the list were made during the interviewing period but these operators were difficult to schedule and survey. Seven operations that could not be contacted by telephone to request their participation may have discontinued their tourism activity or could have been away temporarily. Seven operators did say that they were no longer going to be involved with tourism. It is known that 63 owners were operating and agreed to participate in our study. It also is known that there are three additional new businesses with no data and six other operators who did not wish to participate in the study. This results in a minimum of 72 functional businesses in 1997. A few independent operators could have been overlooked but we are reasonably confident that the total number of rural agri-tourist facilities is 80 or less. This estimate appears reasonable as Fennell and Weaver (1995) list a total of 76 "vacation farms" in Saskatchewan in 1995.

With more than 60% (50 of 72+) of the agri-tourism operations sampled, the data presented in this study should be reliable. The 1995 Saskatchewan study sampled approximately 50% of known businesses and there were only 31 operators sampled in the Manitoba eco-tourism study by Weaver et al. (1995). Based on advertisements of known agri-tourism operators who are not in our sample, the reliability of data for day-tour owners is highest because there are only two other known facilities not included. Eight vacation farms were not surveyed, with five of these located on the northern limits of the study area where hunting is promoted. All other units advertise as bed and breakfast operations.

The turnover rate of businesses in the agri-tourism industry appears to be relatively high. Twenty-eight percent of the respondents began operating last year, and 56% since 1993. If seven of the 79 owners telephoned, and a few of the operators who could not be contacted are leaving the industry, an annual loss estimate from the industry in excess of 10% seems probable. Similar results are noted in Saskatchewan where seven of 83 operators had discontinued tourist activities during the study year (Fennell and Weaver 1995). Overall, however, the agri-tourism industry in Manitoba appears to be growing as the number of operators entering the business exceed those leaving.

Our data are derived from 22 businesses classified as bed and breakfasts, 18 vacation farms, and 10 day-tour operations. It is, however, difficult to distinguish the three rural vacation types. Day-tour facilities are the easiest to identify because they have no overnight accommodations and entertain guests for less than a day. Nevertheless, one owner who has overnight accommodations and claims to operate a bed and breakfast, obtained most income from day-tour activities. Most bed and breakfast operators supply extra meals upon request for guest stays of several days, and some offer "farm" activities for these clients. To further complicate the issue, all vacation farm operators have visitors who only stayed overnight. The designation of an operation into the respective categories was that made by owners. It is, therefore, essential to know that estimated values cited for various agri-tourist components may be influenced by cross classification.

Most agri-tourist facilities occur within 100 miles of the American/Canadian border primarily because this region represents the farming area in Manitoba (Figure 1). Furthermore, Lake Winnipeg and Lake Manitoba force all trans-Canada highways to be located in the south.

The location of the majority of the facilities in the western half of the province was not expected. With Winnipeg's urban society accounting for more than half of the province's population and with Lake Winnipeg being an established recreation attraction, it was anticipated that more vacation facilities would be located around the City and Lake to accommodate a large urban market. Few rural facilities are located either northeast of Winnipeg or east of the Sandilands escarpment. Most "eastern" agri-tourist facilities (including a majority of the day-tour operations) are concentrated around the Town of Steinbach (South East Tourism Network) and north along Provincial Highways #8 and #9. The northern concentration extends from Selkirk

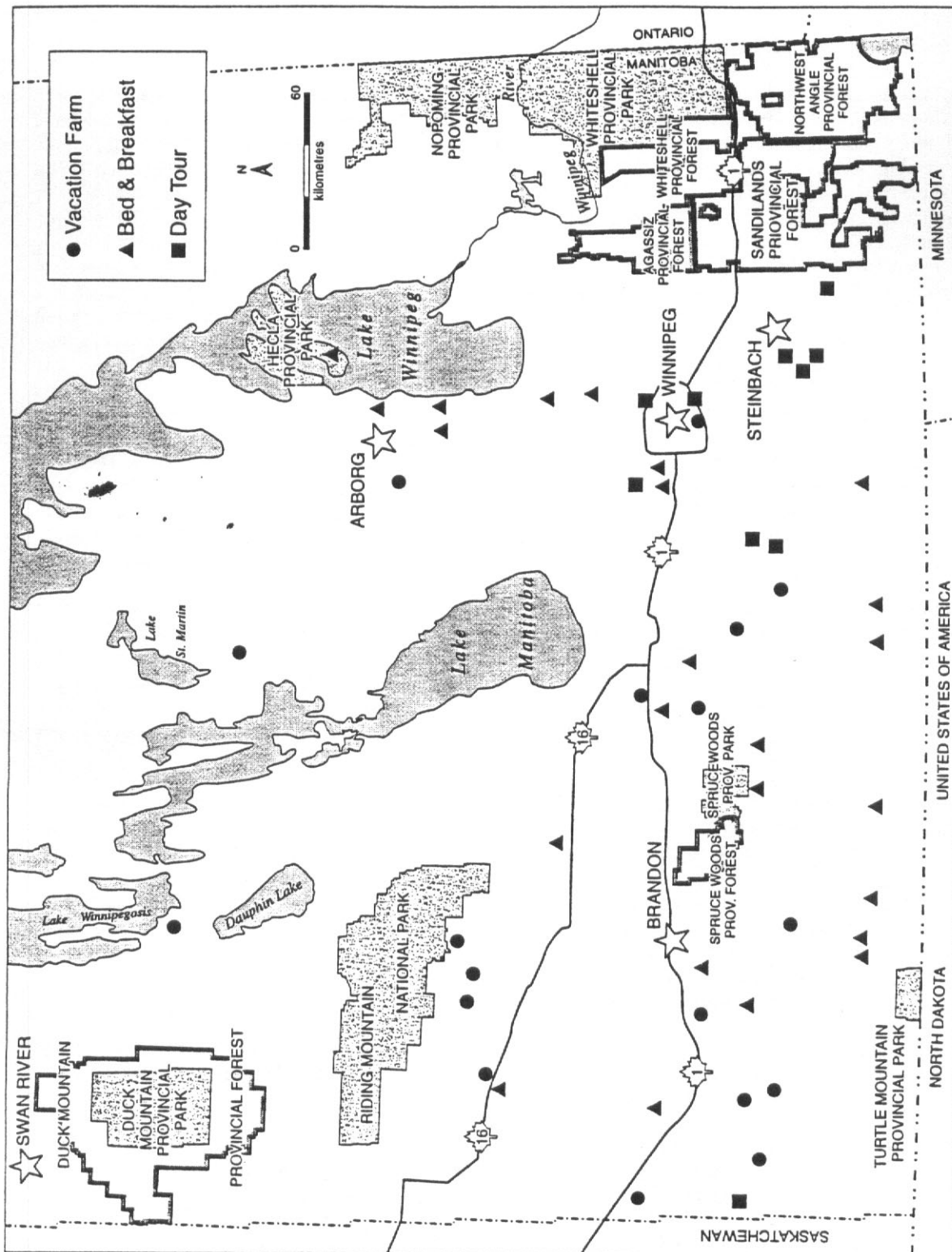


Figure 1. Distribution of Manitoba agri-tourism facilities - 1997.

to Arborg with bed and breakfast homes located closer to Winnipeg and vacation farms located 1-2 hour drives north by automobile (Figure 1).

The Manitoba government lists tourism as one of six sectors designated for potential expansion (Travel Manitoba 1995). There is potential for additional facilities in the agricultural areas along the Winnipeg River, the southern Interlake District (between Lake Winnipeg and Lake Manitoba), north of Riding Mountain National Park but south of the Duck Mountain Provincial Park, and in the Swan River Valley. We suggest that future operations be more "vacation farm" oriented where guests stay several days and are offered specialized agricultural activities. Because the western rural facilities are evenly spaced, and most owners of these facilities want more clients, future development in the southern and western regions may be limited unless the industry expands rapidly in number of clientele.

The frequency of rural vacation facilities relative to biome and wilderness classifications reflects the types of family farm operations within the areas. Along the southern border, the prairie that once existed has been transformed into grain farms. Only 52% of Manitoba's agri-tourism operations occur on the prairie biome, compared to 80% in Saskatchewan (Fennell and Weaver 1995). However, the prairie region extends much further north in the other Canadian Prairie Provinces and this accounts for the higher values. Towards the northern limits of Manitoba's agricultural industry there are fewer frost-free days and less land broken for cereal crops. This "parkland", with its scattered wetlands and semi-wilderness topography encourages mixed farming, ranching, or other specialized occupations such as tree farming. The reason for the 27 respondents listing "parkland" in the survey is that this biome type is extensive in Manitoba. The few respondents who are located in boreal forest and wilderness environments generally are located in parkland areas next to regions where higher relief permits growth of coniferous forests. These tourist facilities often are located next to parks such as the Turtle Mountain Provincial Park or Riding Mountain National Park.

Grain farmers who augment their income with tourist activities generally have land holdings of more than 320 acres. Those with holdings between 160-640 operate mixed farms or raise livestock. Those possessing small acreages either work in "off farm" jobs, are retired, or devote the majority of their time to tourism.

Providing rural holidays in Canada is a relatively new and growing phenomenon with few operators having much experience. In rural Manitoba in 1994 the occupancy rate for overnight accommodations increased more than 13% with 6,734 accommodation units (Travel Manitoba 1995). If each unit has the capacity for two tourists and that capacity is compared to the present capacity of the rural farm vacation units, the country bed and breakfasts and vacation farms constitute about 3% of the total. Because of demand many owners have decided to become involved with the tourist business by adapting two or three extra bedrooms in the primary residence or constructing a detached cabin(s) for guests. Consequently, the number of guests (averages are 7-10) that could stay overnight at most bed and breakfast or vacation farm facilities is determined by placement of a couple of single or double beds in each spare room. Respondents who can accommodate more tourists than the average are those who have created additional guest rooms. The 70% of owners in this study who indicate that they would expand or improve their facilities within the next five years realize that tourist dollars are directly dependent on numbers of hosted visitors.

Information on the importance of each rural activity to guests (Table 1) was obtained directly from perceived ratings by operators. Operators may have rated activities to promote their own facilities, but this was not evident to the investigator in any of the 43 interviews with owners. For example, most people appreciate natural phenomena so it was expected that categories such as viewing nature and wildlife would rank high. The importance of other activities such as farm work, hunting, photography, education, fishing, boating, horse-related, etc. are similar to the relative importance listed by Fennell and Weaver (1995) and Weaver et al. (1996). In Saskatchewan, hunting is the second most cited activity but is ranked fourth in the Manitoba study. This may reflect the fact that data was not available from some of the northern vacation farm facilities where hunting is advertised, and that there are 22 bed and breakfast units that generally do not promote either longer stays or specific activities. With 15 activities cited on the survey and 24 respondents listing "other" activities, it is apparent that tourists enjoy many rural activities.

Among fauna, mammals and birds are of greatest interest to tourists (Table 2). People from foreign countries or major urban areas may not have opportunities to become familiar with either wild or domesticated animals or birds common to rural Manitoba. Survey results indicate that 75% of the respondents list fishes as an insignificant base for activity. This may reflect the fact that only 20% of the properties have lakes on or near their land.

The low ranking of vegetation and flora was not expected. Approximately one-third of the operator group plants as a "none" activity and only 10 indicate that they are of major importance. With the dependency of man on agricultural produce, the beauty of gardens and flowers, and the media's attention to forest destruction, it was thought that vegetation would have received higher ranking. Amphibians, reptiles, and invertebrate animals (including insects) generally are listed under the "other" category and 82% of owners believe these fauna are not important components of the tourist experience.

Agri-tourism operators must be aware of the importance of nature and adventure travel as tourist attractions for Manitoba, Canada, and the world. Scace et al. (1992) and the Canadian Tourism Commission (1995a) list many facets of eco-tourism and describe the potential economic importance of viewing the flora and fauna to a region. For example, bird watching at Point Pelee, Ontario, in the spring of 1987 drew 57,000 people and generated \$5.4 million tourist dollars. Foreign tourists often enjoy adventure activities such as bear watching, kayaking, scuba diving, and snowmobiling. For example, the Canadian Tourism Commission (1995b) states that 54% of the tourists involved with adventure activities are from out-of-country. Manitoba agri-tourism operators should realize the scope and potential of ecotourism or adventure activities and specialize in some aspect(s) in their rural operation.

Approximately 45% of guests hosted by all agri-tourist components are local, 60% are Manitobans, 80% are Canadian, and less than 20% are from abroad. These values vary with the type of facility (day-tour operations cater to local Manitobans), but overall results are similar to other studies. Travel Manitoba (1995) estimates that more than 70% of the provincial tourist market is comprised of Manitobans, but they give no numbers for Canadian or foreign markets. They do, however, provide data on dollars spent. Sixty percent of total tourist expenditures are from Manitoba, an additional 28% are from Canadians, and 12% are from non-Canadian visitors. In a Saskatchewan study, Fennell and Weaver (1995) note that 41% are persons from Saskatchewan, 76% are Canadian, and 24% are foreign. No reasons are given why their farm vacations attract somewhat fewer people from within Saskatchewan, or why they have a higher percentage of non-Canadian tourists.

Data from the Manitoba eco-tourism study by Weaver et al. (1995) indicate values of approximately 55% Canadian (45% provincial), and the remaining 45% foreign. The high percentage of non-Canadians is attributed to unique ecotourism opportunities such as viewing polar bears and whales in Churchill, Manitoba.

Most agri-tourism facilities are not operating at capacity and data presented (Table 3) illustrate a wide range in numbers of visitors per business. The values for day-tour operators appear to be most consistent and reliable as the averages are between 2,000 - 3,000 per year. Variations in annual numbers of visitors at these facilities probably reflect their proximity to Winnipeg, activities offered, and short length of the operating season.

Values from the vacation farm component are influenced by a couple of owners who encourage group day trips but who still consider their businesses to be vacation farms. The low values are recorded by a few operators who are just getting involved in the industry. Because a few owners with high numbers of guests increase the average values, it is probable that a better estimate for vacation farms is the median of about 40 persons per year. Bed and breakfast operators record guest numbers that range from 1-30,000. Extreme upper and lower limits are not representative. Averages of 40-80 guests per business per year are realistic. The number of clients per year using Saskatchewan vacation farms ranged from 2-7,000, with averages between 332 and 431 persons (Fennell and Weaver 1995). However, data for the various components of their rural vacations are not available.

Climate and seasonality are dominant factors determining Manitoba's tourist numbers. Fifty percent of country-vacation clientele traditionally take their holiday during the summer season. Weather, day length, and social influences such as the school year contribute to timing. The value of approximately 20% during autumn is about 5% higher than either spring or winter. Manitoba's fall weather tends to be warm and dry with sunny days and cool nights. Activities related to harvest, bird migrations, fishing, and hunting at farm vacations probably account for the slightly higher percentage of clients during autumn than during spring or winter. Spring is generally a cool wet season and people are too busy with other activities to take holidays. If it were not for the high numbers of school children going on day trips, tourist numbers during spring would probably be the lowest of any season.

Manitoba winters are long and severe, but snow cover and freezing temperatures do permit tourist activities such as skiing, curling, snowmobiling, snowshoeing, and ice-fishing. These rural activities determine winter vacation numbers. In spite of the fact that many Manitoba residents take a winter holiday and go south to escape the cold, two respondents surveyed restrict their tourist operation to the winter months. One operator promotes snowmobiling and the other wildlife viewing followed by dinner parties. Manitoba's agri-tourist industry, however, is not advertising the winter experience to the international market. Some tourists from tropical or subtropical countries, who have never seen snow or experienced cold, might consider a "Christmas in Canada" or a "Winter Wonderland" holiday.

Rural Manitoba's accommodation demand increased by 7.6% in 1995 and the average stay for all tourists in the province was greater than one full day (Manitoba Travel 1996). Approximately 50% of the rural guests stayed for only one night, but those that stayed several days bring the average farm holiday close to two days. The percentages of clients in corresponding length of stay intervals in Saskatchewan (Fennell and Weaver 1995) was similar and did not deviate from those in Manitoba by more than 5%. Bed and Breakfast units have more overnight guests because some tourists use them as conveniences rather than a vacation site. The longer stays at vacation farms and the 25%-33% repeat clientele reflect the importance of special services or activities provided. Other factors that influence the length of stay by guests at rural facilities are the origins of clients, accommodation standards, costs, the guest's need for relaxation, and the experience of country solitude.

The profiles of travellers at rural vacation facilities differ from those in other holiday types. Although the value of 51% female is identical to that for other domestic adventure travellers (Canadian Tourism Commission 1995a), the age distribution differs. The approximate distribution calculated for Manitoba agri-tourist respondents is children = 20%, adults less than 40 years = 30%, adults between 41 and 60 years = 35%, and seniors = 15%. The profile presented for two comparable age intervals for all tourist facilities in Manitoba was 47% between 18 and 39 years and 22% more than 60 years (Manitoba Industry, Trade and Tourism 1996). Results from a survey of people taking group tours in the northeastern USA were children = 8%, 18-40 years = 16%, 41-60 years = 25%, and more than 60 years = 51% (Smith, 1989). The only comparable data from Saskatchewan are that children constitute about 18% of the farm guests (Fennell and Weaver 1995). When raw data on ages of clientele from individual respondents in Manitoba are reviewed, it appears that age distribution varies with the rural activity and the age group targeted. Variations in age distributions from other studies probably reflect the same two factors. There is wide enough variation among studies to suggest that some market opportunities are not being pursued in Manitoba.

Because more than 50% of the agri-tourist operations in Manitoba started since 1993, few owners have investigated the effectiveness of different methods of advertising. No respondents indicate that they have completed or are completing quantitative analysis of how their guests heard of their facilities and what attracted them to come. More than 80% of the facilities advertise in the free government publication Manitoba Accommodation and Campground Guide, and two owners state that it is the only promotion they use. The limited income from tourists for most agri-tourism operators restricts their advertising budget to four or five inexpensive procedures. Common methods employed, in addition to recommendations of previous guests, are road signs and brochures. Few respondents currently are using local media, and only seven have ever been involved with a tour wholesaler. Approximately 40% of the operators are on the internet as members of

associations or networks, but few have their own home page. This percentage should increase during the next few years because operators will realize the internet's potential for world-wide advertising and communication.

One-third of all operators are not affiliated with either tourists associations or networks and, consequently, are not pooling promotional efforts or dollars towards large-scale domestic or international coverage. If agri-tourism operators want more clients, they cannot be passive and let government be their only promoter at trade shows or with tourist publications. They must become more actively involved. There is a need for government agencies, associations and networks to present workshops on promotional techniques, including those suggested by Church (1993) and Lewis et al. (1992), for attracting tourists to rural destinations. The owners then can weigh the advantages of each method against their advertising budget.

There also is a need for additional training programs for operators. Eleven respondents state that they have some formal training in areas related to their business, but nobody has diplomas or degrees from colleges or schools directly linked to all facets of tourism. Agri-tourist operators in Manitoba must give credibility to their industry by developing competitive professional attitudes. The travelling public demands standards, not only for accommodations and cuisine, but also for service. Operators must be aware of federal, provincial, and municipal codes for housing, safety, and health, and they must surpass all minimum requirements. The Canadian Tourism Human Resource Council provides a certification program for development of national service standards for hosts in tourist-related occupations (Brown 1997).

The Economics of Agri-tourism

Typical bed and breakfast and vacation farm operations can supplement their family income by \$2,000-\$10,000, but few operators can maintain their livelihood from tourism. In general, monies received from clients comprise less than 20% of the gross annual income. Factors that regulate tourist revenues include demands on time and effort for other jobs or agricultural practices (average time on tourism = 20%) and availability of bed spaces (average 7-10) in the main residence or cabins. Operators of day-tour facilities generally earn \$5,000-\$10,000 more than bed and breakfast or vacation farm businesses because they can host many tourists (average 2,000-3,000) during a short time interval. Furthermore, there is time for other duties, fewer overhead expenditures, and less continuous effort required for lodging, feeding and entertaining guests.

Most owners surveyed estimated operating costs at about 50% of the gross tourist dollar intake, so actual profits for most agri-tourism operators are less than \$5,000. The five (11%) respondents, who claim gross incomes in excess of \$30,000 devote up to 100% of their time to tourism. They often have overnight accommodations for clients as well as facilities for day-trip activities.

Agri-tourism operators in Saskatchewan have higher incomes than those reported in Manitoba. Their mean gross income is greater than \$14,000 with approximately 77% making less than \$10,000 and 17% more than \$30,000 (Fennell and Weaver 1995).

There are many possible reasons why incomes from agri-tourist operations are low. Demands of other occupations and limited facilities are two courses factors, but owners also must develop skills to compete with the hospitality businesses in villages, towns, and cities. Owners with overnight accommodations must be prepared to create clean attractive homes, bedrooms with comfortable beds, ample bathrooms, and have dining facilities where quality meals are served. These facilities should equal or surpass those of local hotels, motels, and cafes. Owners who are promoting rural activities must have well-kept buildings, attractive yards, and safe equipment. In addition, operators must be motivated to learn about their industry. Rural people are friendly and hard working, but operators must develop techniques in business and marketing, learn the advantages of networking, and cultivate hosting skills to be competitive.

Currently there is no licensing or certification of operators, no provincial standards for accommodations, and few safety standards for activities in Manitoba. Standards for consumer protection, the protection of operators from possible litigations, and the future protection of the industry must be addressed. Government agencies, associations, networks, and independent operators should cooperate to provide operator training and establish standards.

The daily cost to tourists for vacation packages depends on the length of stay, the number of guests per room or cabin, number of meals required, the season, and activities involved. Most respondents have an overnight adult rate per room per day for single (average \$33.00) or double occupancy (average \$45.00). There is an additional charge of \$10.00 per child for families. The daily charge per person for a detached cabin is similar to accommodations in main residences.

In general, accommodations for farm holidays are slightly less expensive than small town hotels or motels that have an average daily room rate of \$50.61 (Travel Manitoba 1996). Lunches and dinners can be supplied at extra costs of \$10.00 per adult and \$5.00 per child. Some owners have all inclusive daily or weekly packages. Higher daily rates generally are charged if the operator supplies equipment or personnel for an activity. Costs for day tours (average = \$3.75) and campsites (average = \$7.00) are relatively constant among respondents. Higher charges occur where additional services or food are provided.

Few operators are capitalizing on any type of sales promotion with reduced rates. Techniques such as sweepstake awards, price-off couponing, off-season rates, or frequent visitor programs may reduce profits per client, but associated advertising and additional guests ultimately may prove beneficial.

Respondents contacted 16 government departments or agencies to assist them in their business. Only Travel Manitoba is contacted by more than 50% of the operators. Two-thirds of the operators believe that advertising by Travel Manitoba is the most important service provided by any governmental agency, and they appreciate the agency's role. Ten agencies are contacted by three or fewer owners. Furthermore, there are many additional government support groups never approached, such as the Manitoba Tourism Marketing Council, Canada Select, or Community Futures, that could provide information related to marketing, accommodations, or financial assistance.

Although there are no direct questions on the questionnaire pertaining to respondent's lack of involvement with agencies, comments were made during interviews. Most operators do not know the mandate of each agency or how to make contact, and many respondents feel that bureaucrats do not understand or care about rural problems. Other common remarks are that there is little communication between departments and no united effort or policy for agri-tourism. Also a feeling exists that government is not there to help, but only to control, and owners do not want additional regulations that may restrict business. For the industry to develop further, government departments and agencies must dispel these feelings, educate operators on avenues of assistance, and show agri-tourism operators that their businesses are important.

Problems experienced by Manitoba agri-tourism operators are similar to those cited for the eco-tourism industry in Manitoba (Weaver et al., 1995) and the agri-tourism industry in Saskatchewan (Fennell and Weaver, 1995). The main natural phenomena that cause difficulties are weather, distance, and lack of recreational waters. Because most operators do not reside along major transportation routes, winter weather can isolate them from potential tourists. Weather during any season may interfere with rural activities. Little can be done to reduce climatic effects, but most tourists are prepared to make alternate plans for bad weather during their holiday period. Agri-tourism operators should be prepared to offer alternative activities during inclement weather.

Distance from populated urban centers, major transportation routes and airports create difficulties for operators catering to foreign tourists or guests using the facilities for either day trips or as convenience units for overnight stays. If an operator has developed the facility with special lodging and activities, tourists will treat the operation as a destination and distance is less likely to be a limiting factor. Lakes and rivers attract tourists but the largest agri-tourist operation in Manitoba with respect to guest numbers is not adjacent to

Winnipeg, is miles from a major highway, and has no natural waters on the property. However, the facility provides a unique experience for guests.

Twenty-six of the 50 respondents cite natural rural scenery with lakes, rivers, wildlife, and nearby parks as major reasons why tourists choose Manitoba farm vacations. The desire to experience the "great outdoors" is a world-wide phenomena. As stated by Greffe (1994), the three most important reasons for Europeans choosing a rural holiday are contact with nature, a family holiday, and an inexpensive vacation. Fennell and Weaver (1995) report that only two of 36 respondents indicated that the rural setting did not contribute to their business. Weaver et al. (1996) note that more eco-tourism operators respond to the opportunities of Manitoba's hinterland and wilderness than any other single attribute. Because the physical and biological features are such an attraction for tourists, agri-tourist operators must learn about ecology and protection of their environment in order to provide quality experiences to guests.

Few respondents (16%) report cultural or social barriers to their business. Problems related to animal rights movements and extreme environmentalists, relationships with neighbours, and unsafe hunting practices each are recorded by two respondents. Conversely, 60% of the owners report that local social attractions and cross-cultural activities assist their businesses. The few reports of barriers and many positive reactions to local events indicate that Manitoba has a good social climate for the industry and that its people are co-operative and tolerant of others. Fennell and Weaver (1995) also note that "cultural and social factors did not elicit strong responses" in Saskatchewan.

The actions or lack of action by federal, provincial, or municipal governments, however, evoke both positive and negative comments by more than 50% of the respondents. Twenty of 27 owners acknowledge the advertising efforts of all three levels of government; most operators indicate that this is the most important service offered. Eight respondents who received financial grants and loans state their appreciation, but a common question asked was how and where to make application for assistance. Finally, both the value of workshops sponsored by governmental agencies and the importance of nearby federal or provincial parks are reported by four respondents.

In general, operators are more emphatic about political decisions that hamper their business, and they often propose solutions to the problems. Approximately one-third of operators are concerned about hunting. Revenue from hunting is a major source of income for many vacation farms and a few bed and breakfast operations. Concerns center on proposed federal gun laws and the declining number of Manitoba hunters. Most outfitters believe that the "red tape" of Bill C-68 (Minister of Justice 1996) will further reduce numbers of resident firearm owners, and the difficulties with gun registration will discourage non-Canadian hunters. Knudsen (1996) reports that the total number of hunters in Manitoba between 1981-1993 declined from about 85,000 to 55,000 (average = -2,500/yr.). If the decline continues, some operators may be forced out of business. In Saskatchewan, as in Manitoba, government regulations on hunting are the greatest single concern (Fennell and Weaver 1995).

Public liability insurance is a significant and emotional topic for vacation farm and day-tour operators because of high premiums. A solution to the problem may be for the provincial government to create legislation similar to the Colorado Equine Law (Colorado Senate Bill 90-84). If litigation settlements are limited, the premiums are affordable. Operators of eco-tourism and adventure holidays also express the need for affordable public liability premiums (Weaver et al. 1995).

Agri-tourism operators criticize both provincial and municipal governments concerning policies on signage. The major difficulties lie with provincial regulations and costs related to highway signs, and with municipal by-laws related to placement of advertisements. While some associations and networks claim that they cannot purchase road signage from the Manitoba Department of Highways, others claim that it is too expensive. Discontent with some municipal by-laws is centered on sign size and distance from road allowances. These problems could be solved if all components of the agri-tourist industry have equal access to highway signage at a fair price, and if municipal policies for sign placement are consistent.

Negative government-related concerns (three respondents each) relate to taxation. Taxation concerns not only involve add-on federal and provincial sales taxes that increase consumer costs for rural holidays, but also changes in classification from municipal agricultural taxation rates to commercial rates for cabins in the farm yard, or for residences with more than four bedrooms. All hospitality businesses, however, must pay sales and commercial tax rates, and it would be inappropriate for agri-tourism facilities to be exempt. A second area of concern involves complaints about parks offering unfair competition by using public funding to support resorts and campsites, park activities, and management. Owners who state that federal or provincial campsites or state owned resorts have an unfair advantage, have a legitimate concern. State-run facilities are maintained and advertised with public money, whereas these costs for agri-tourism facilities must come from an owner's profit. With respect to park activities and administration of park policies, any differences of opinion must be negotiated by individuals or associations with federal or provincial Park Boards.

Only 12 and 15 respondents made comments about economic opportunities or barriers, respectively. The opportunities relate to loans or grants received and with the foreign exchange rates of the Canadian dollar. The main barrier relates to managers of money-lending institutions who do not appear to understand the needs or potential of the agri-tourism industry. Joint-sponsored educational seminars with banking companies and associations or government agencies could make everyone aware of problems. Another economic concern lies with the uncertainty of future demand for rural holidays and cutbacks. The agri-tourism industry has little influence on federal or provincial economies, availability of monies for grants, or the international money market. The industry must be prepared for future change, the direction of which is unknown.

Recommendations

Available information indicates that there is an emerging agri-tourism industry in Manitoba. The industry is experiencing minor difficulties that may be resolved through the cooperative efforts of government, provincial tourism associations and networks and private operators. For continued development, all groups must promote the industry by attracting and exposing tourists to positive rural experiences. The role of the provincial government as a whole, and the respective departments in particular, should be supportive to the industry in terms of promotion, facilitation, and regulation. The role of the associations, networks, and operators is to provide clients with quality accommodations and rural activities. Response to the following recommendations by governments and operators may solve some of the difficulties noted.

- 1. It is recommended that a Joint Agri-tourism Board composed of equal numbers of members from government and operators be established to create the conditions necessary for a successful Manitoba agri-tourism industry.**

This small but active Board should contain appointed government members from departments directly associated with agri-tourism. The elected association members or independent operators on the Board should represent the vacation farm, bed and breakfast, and day-tour components of the industry. The Board should act as a communication route between operators and government. Its concern should involve the practical aspects of the industry such as promotion, certification of operators, industry standards, consumer protection, and other minor difficulties of the developing industry. It also may be involved either directly or indirectly with providing funding to operators. The Board may be either an independent entity or become affiliated with the Manitoba Tourism Marketing Council.

- 2. All agri-tourism operators within the three components of the industry must be certified by the provincial government. With certification must be sets of standards to guarantee quality accommodations, eating facilities, and the general safety of the consumer while on the operator's premises.**

Presently there is no license required by operators to enter the industry. Of greater importance, is the fact that there is no organization enforcing regulations or standards for facilities. Associations do

encourage common pricing but the tourist's cost may not reflect either the quality of accommodation or services provided. Although there are many excellent rural "farm vacations" available, some facilities would not meet accommodation and safety standards required by other tourist businesses. The sub-standard facilities have a negative effect on the industry because they discourage tourists from repeating a rural experience. Furthermore, the lack of safety features at some facilities may expose visitors to serious injury and expose the operator to litigation.

Standards cannot be created and regulated by associations or networks. Many operators are independent and are not members of or affiliated with groups such as the Country Vacations Association, the Manitoba Bed and Breakfast Association or the Southeast Tourism Network. Independent operators, as well as those in associations, should meet common provincial standards. The Joint Agri-tourism Board should be involved, and either create criteria for standards and have an independent reviewer examine facilities, or employ a system similar to the Canada Select Accommodation Rating Program which has national standards for tourist homes, farm vacations, and rural bed and breakfast units.

- 3. The Manitoba government should complete a review of the responsibilities and policies of those departments and agencies that interact with agri-tourism operators. The purpose is to develop and coordinate policies related to business.**

Few agri-tourism operators have had interactions with provincial agencies other than the free advertising provided by Travel Manitoba. Most operators are unaware of the activities of the various departments. Several individuals express concerns that government initially encourages individuals to become involved with agri-tourism, but few bureaucrats go to the rural sites to assist with practical solutions to the problems of a new business. The Joint Agri-tourism Board could act as the necessary communication link between operators and government agents who have the required background knowledge.

- 4. In an effort to promote tourism by the private sector, the provincial government should not develop and operate campsites, overnight accommodations, and eating establishments for tourists.**

Some operators express concern about the provincial government encouraging them to become involved with the tourist business and then directly competing with them for the tourist's dollar. In particular, operators mention campsites in provincial parks and the crown corporation that operates the resort on Hecla Island. The existing facilities could be leased to private operators who would abide by regulations to guarantee preservation of the park and its facilities.

- 5. The Government of Manitoba is encouraged to legislate or establish a "no fault" or "participants waiver" liability insurance regulation.**

The governments of several western states in the USA have established legislation that limits payouts by insurance companies for accidents involving commonly used vacation equipment and domesticated or wild animals during farm vacations. Activities common to dude ranches, boating-rafting, or hunting outfitters have a degree of risk or danger to the client. The degree is often proportional to the client's skill or physical body condition. It is argued that, if a client voluntarily participates in the activity, then he or she must assume some of the responsibility for any related accident. With limited fiscal court settlements, premiums for public liability insurance policies in Manitoba should remain affordable to agri-tourism operators. Such policies would, for example, provide some financial compensation for someone bitten, scratched, or kicked by an animal at a farm petting zoo or an individual taking lessons at a riding stable, but there would be realistic upper limits. This type of insurance would be welcomed by all day-tour and vacation farm operators, as well as those bed and breakfast facilities that promote visitor involvement in rural activities.

- 6. The Government of Manitoba is encouraged to recommend amendments to the proposed federal firearm regulations to encourage the promotion of hunting as a potential rural activity, and the development of a rural service industry.**

The proposed firearms regulations as stated by the Canadian Department of Justice in November 1996 will make it difficult for non-resident hunters to bring unregistered guns into Canada, or for non-Canadians to use the registered guns of outfitters. There will also be difficulties for non-residents transporting firearms. The results of this study indicate that hunting is a popular activity at many vacation farms. Some operators indicate that monies received from hunting activity provide the majority of their tourist income.

According to the number of hunting licenses issued in Manitoba, the number of resident hunters is declining. Because of this decline and the difficulties with bringing guns into Canada by non-residents, several outfitters state that they may be forced out of the tourist business.

- 7. Government agencies, in cooperation with associations, networks, and independent operators, should provide seminars on principles and practices related to the agri-tourism industry.**

The Agri-Ventures agency of the Manitoba Department of Agriculture provides introductory information on advertising and opportunities in agri-tourism. However, operators who have one to several years in the trade indicate that they require additional training in international marketing, marketing with the internet, staff management, financing and expansion, and taxation. Other topics requested include legal responsibilities, types of insurances available, and the advantages of networking. Offering seminars on subjects related to the industry may induce more active participation by members of associations and networks.

Associations and networks must be aggressive in developing the industry. Many members express disappointment in their associations because they see them as providing only advertisement. In-depth workshops may create a more active membership.

- 8. The Government of Manitoba, associations, networks, and all agri-tourism operators should promote winter vacations.**

Manitoba has a five month snow-covered season. The domestic market is aware of rural winter activities but residents in tropical or semi-tropical countries may wish to see snow, experience cold, or participate in winter sports. Foreign tourists would help provide off-season income.

- 9. Associations and networks should investigate the advantages of creating regional or activity units.**

Distances and time in Manitoba are barriers for active membership participation owing to costs to individuals. Local or regional associations that discuss topics of specific interest may get members more actively involved.

- 10. Pamphlets and brochures distributed by associations, networks, or independent operators should be updated annually when changes in membership, facilities, or activities occur.**

Inaccuracies in advertising by groups or individuals negatively affect the industry as a whole because they create public distrust. Updating listings is expensive, but distribution of false information will destroy the industry's integrity.

- 11. Independent operators and members of associations should form marketing networks.**

Most vacation farm and bed and breakfast operators act as independent units. They tend to be generalist and try to provide a wide range of activities or services for the public. Networking permits operators to become specialists and develop their own niche. Several similar or diversified specialists from within an association, from different associations, or independent operators and members of an association may

combine to form a network. A network with a theme or package can advertise both domestically and internationally. Network members share money and labour costs for advertising and, by combining resources they would normally spend in promotion, have sufficient capital to reach a wider market. The package that they advertise may be large enough to interest tour wholesalers. Businesses within the network may share clients, but normally the network packages attract more tourists, and individual operators can attain greater economic gain than if acting alone. The formation of a network does not exclude any operator from independent activities when not involved with network tourists. An operator is not restricted to membership in only one network. Examples of two networks in Manitoba are the School Tour Network and the Southeast Tourism Network.

12. All rural agri-tourism operations should have sufficient road signage to provide direction to their facility.

Less than one-third of all rural facilities have any or adequate signage. Minimum signage normally would consist of a large sign with directions and/or distances at the intersection with a major traffic route and a similar smaller sign at the lane of the property. Signs should be mounted at a height free of obscurity from summer vegetation or winter snow accumulation. Because darkness arrives in late afternoon during winter months, and because many bed and breakfast operations request their clients arrive in the evening, signs should be either lit or have light reflecting materials in their construction. Letter size and style should permit ease in reading. Sign colour should have contrast between lettering and background. The sign background should not blend with the environment.

Associations or networks may wish to standardize for recognition of membership or activity. Independent operators and those in associations and networks should lobby the Manitoba Department of Highways to provide distinguishing road signs at a reasonable cost.

13. Rural agri-tourism operators with sufficient space should consider development of quality camp sites and serviced parking sites for trailers and mobile home visitors.

Based on demand for quality camping and parking spaces in provincial parks and privately operated facilities along major traffic routes, there is a demand for this type of accommodation. Of the facilities surveyed for this study, only 16 operators have any camping facilities, and there is only one serviced with water, electricity, and waste disposal facilities

14. Operators must be concerned with maintaining good rapport with their neighbours who are not directly involved with tourism.

Several operators express concern about the possibility of deterioration of relationships with neighbours. They felt that getting the neighbours peripherally involved with an activity or by providing occasional employment prevents potential problems. Examples include hiring neighbours for kitchen and cleaning duties or offering incentives to utilize a neighbour's land for activities.

15. Operators that are distant from major traffic routes should develop special accommodations or activities for clients and not depend on short notice "drop-in" customers.

Individuals, couples, or families travelling along major highways often utilize vacation farms or bed and breakfast units for over-night stays because they enjoy the hospitality and security of a "home-like" setting. However, these travellers seldom drive more than 10-20 kilometres off the main road to experience a more remote operation unless there is some special attraction at the facility. An attraction changes the overnight unit from travelling convenience to a destination where the uniqueness makes the extra distance worth the effort.

- 16. Operators should obtain information from guests on how they heard about their facility and what factors encourage them to stop. With this information, owners can complete an analysis of promotion techniques to determine the most effective return on their advertising dollar.**

No respondents indicate that they had information on types of promotion and numbers of clients attracted. Basic information from visitors provides useful information that is essential to future operations. A seminar on how to collect and interpret such information would be useful. The pooling of information across networks would benefit the entire industry.

- 17. When open for tourists, owners should make every effort to be available for quick responses to client's inquiries.**

Tourists often are frustrated when they cannot contact an agri-tourist facility for possible reservations. With communication equipment available today, such as answering machines, "call forward" services, cellular telephones, fax transmissions, and e-mail, a potential customer can expect a rapid response to inquiries. Operators who are unable to contact clients rapidly lose bookings and negatively affect the farm vacation industry as a whole.

- 18. Operators whose facilities are adapted for mentally or physically handicapped clients should promote that aspect of the operation.**

Few agri-tourist facilities in Manitoba are able to accommodate severely handicapped tourists because the facilities are the residences of active rural people. Several operators indicated that they could entertain visitors with minor disabilities but individuals confined to wheelchairs and needing ramps, modified bathrooms, and tables would have difficulties. Although the demand for such facilities is unknown, a business that provides appropriate access may find a receptive audience.

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Appendix A

Manitoba Vacation Farm Survey

Please answer the following questions concerning your vacation farm operation by checking appropriate boxes or giving written responses. This survey is voluntary and all information is confidential. Should you not wish to answer any question or section, please leave it blank.

A. Farm Site Characteristics

1. The land base for your vacation farm has (check all features that apply):
 boreal forest parkland (trees and grasslands) prairie
 ponds or marshes rivers or streams lakes
 other (specify) _____

2. The farm is located in a:
 wilderness region semiwilderness region
 well developed agricultural region

3. The major agricultural activity, other than tourism, is:
 grain farming raising livestock mixed
 other (specify) _____

4. The size of the land base of your farm is:
_____ private acres (owned or rented) _____ crown acres (leased)

5. The overnight accommodation for clients occurs:
 in the main residence as additional guest cabins
 as campground sites not available

6. The maximum number of housed clients you could accommodate is _____ (bed spaces).

7. Accommodating units have:
 self contained areas for food preparation meals provided

8. Are there facilities for special need visitors? Yes No

9. Are education or interpretation materials (books, videos, signage, checklists, etc.) available
 Yes No

10. Do you plan to expand or improve your accommodations, service, or equipment within the next 5 years?
 Yes No

11. What facilities or site characteristics do your guests seem to like the most?

B. Visitor Activities

1. Please indicate activities or interests of clients by checking appropriate boxes.

ACTIVITY	IMPORTANCE			
	Major	Common	Minor	None
Viewing nature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Viewing farming activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Doing farm work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Horticulture (garden, fruit picking)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Viewing wildlife	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Boating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cycling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hiking or Skiing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Photography	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Snowmobiling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education or research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cultural tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hunting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fishing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Horse related	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Please indicate the importance of "wildlife viewing" for your visitors.

GROUP	IMPORTANCE				SPECIES
	Major	Common	Minor	None	
Mammals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Birds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Fish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Plants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Other (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____

3. What is the most important activity for your guests? _____

4. What plant or animal group(s) seems to be the most important to your clients?

4. What percentage of your gross annual income is derived from your vacation operation? _____ %
5. Estimate your annual operating cost (advertising, licences, insurances, salaries, rentals, etc.) for your tourism component. \$ _____
6. Your gross annual income from your vacation farm operation is:
 <\$5,000 \$5,000-\$10,000 \$10,000-\$20,000 \$20,000-\$30,000 >\$30,000
7. If you were to invest more money in your tourism operation (land, facilities, equipment, promotion, services, etc.), where would you develop? Please specify.

F. Governmental Programs

1. Which of the following agencies have you had direct involvement in your vacation farm operation? Please give reason for contact.

AGENCY	REASON
<input type="checkbox"/> Manitoba Department of Agriculture	_____
<input type="checkbox"/> Manitoba Rural Development	_____
<input type="checkbox"/> Manitoba Environment	_____
<input type="checkbox"/> Manitoba Natural Resources	_____
<input type="checkbox"/> Manitoba Industry, Trade and Tourism	_____
<input type="checkbox"/> Travel Manitoba	_____
<input type="checkbox"/> Municipal Government	_____
<input type="checkbox"/> Licensing Advisory Committee	_____
<input type="checkbox"/> Canada-Manitoba Tourism Agreement	_____
<input type="checkbox"/> PFRA	_____
<input type="checkbox"/> Other	_____

2. Which program(s) did you find most helpful in assisting your vacation farm operation?

3. Are you familiar with Travel Manitoba's Marketing Plan and Opportunities Yes No

G. Barriers and Opportunities

1. Are there natural or biological conditions (landforms, wildlife populations, transportation facilities) which hamper your tourist business?
2. Are there natural or biological conditions which assist your tourist business?
3. Are there cultural or social barriers that hamper your tourist business?

4. Are there cultural or social opportunities that assist in your tourist business?
5. Are there political or governmental regulations that hamper your tourist business?
6. Are there political or governmental opportunities that assist your tourist business?
7. Are there economic barriers that hamper your tourist business?
8. Are there economic opportunities that assist your tourist business?
9. Are there nearby competitors for your vacation farm operation? Yes No
Do they assist or hamper your tourist business?
10. What are or were the important obstacles in the development of your vacation farm operation and how can these difficulties be overcome.