

CANADIAN TRAVEL MARKET

Canadian Travelers to British Columbia

A Profile Report

February 5, 2008

Prepared by Lang Research Inc. on behalf of:

Ontario Ministry of Tourism, Ontario Tourism Marketing Partnership Corporation, Quebec Ministry of Tourism, Travel Manitoba, Canadian Tourism Commission, Tourism Saskatchewan, Atlantic Canada Tourism Partnership, Alberta Tourism, Parks, Recreation and Culture, Department of Canadian Heritage, Tourism British Columbia, Parks Canada Agency, Government of Yukon, Government of Northwest Territories



Executive Summary

Over the last two years, 16.9% of adult Canadians (3,631,615) took an overnight trip from another province to British Columbia (for any purpose). 76.1% (2,763,250) of those who took a trip to British Columbia report taking a “pleasure trip” to the province. Among those who took a pleasure trip to British Columbia, 49.0% took two or more pleasure trips to the province in the last two years, the second highest repeat visitor rate (behind the Atlantic Region). British Columbia was the second most frequently visited Canadian destination by Canadian Pleasure Travelers who visited another province (behind Ontario). Those who visited British Columbia are most likely to live in Alberta and Saskatchewan.

British Columbia Visitors are slightly more likely than average to be either 18 to 24 years old or over the age of 64. They are more likely to have a university degree and to report a household income of \$100,000 or more. On average, visitors to British Columbia are more affluent than the average Canadian Pleasure Traveler.

Those who visited British Columbia were much more active in outdoor activities while on trips than the typical Canadian Pleasure Traveler. They were especially likely to go downhill skiing and snowboarding, golfing and to participate in fitness activities. They were also much more active in nature-oriented activities (e.g., hiking, climbing & paddling), sports and games (e.g., tennis) and freshwater scuba diving and snorkeling. They were also very active in culture and entertainment activities while traveling. They were especially likely to attend sporting events, to take part in wine beer and food tastings and to visit spas. They were also more likely than others to have taken part in educational, participatory activities (e.g., aboriginal cultural experiences), to attend live art performances (e.g., musical concerts) and to visit educational exhibits while on trips. They most often stay at public campgrounds and resorts but were especially likely to have stayed at a ski or mountain resorts or in a wilderness area. They were more likely than others to have taken Alaskan cruises, tours of wineries or factories, wilderness tours, city tours and multi-location, self-guided tours during the last two years.

Visitors to British Columbia prefer vacations that are physically challenging as well as intellectually stimulating. They value novelty, learning opportunities and a chance to enjoy nature and participate in a wide array of outdoor activities.

Canadians who took a trip to British Columbia are above-average users of the Internet to plan (70.7%) and book travel (51.3%). They are also above-average consumers of travel media. They may also be effectively reached through city lifestyle magazines, health and fitness magazines, sports-related media and country music and classical music radio stations and news / talk / information radio stations.

Travel Activity and Motivation Survey (TAMS)

The TAMS survey examines the recreational activities and travel habits of Canadians and Americans. The survey examines out-of-town, overnight travel behaviour of one or more nights over the past two years and provides detailed information on Travelers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

TAMS represents a comprehensive assessment of travel behaviour and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada. In particular, TAMS was designed to:

- Identify existing and potential tourism markets;
- Measure the likelihood of these tourism markets being attracted to vacation experiences in Canada;
- Create packaging opportunities for each of these markets;
- Determine how to reach these markets (i.e., in terms of media strategies); and
- Provide information on how to fine-tune and target existing marketing campaigns.

TAMS was sponsored by the following organizations:

Ontario Ministry of Tourism	Quebec Ministry of Tourism
Ontario Tourism Marketing Partnership Corporation	Travel Manitoba
Canadian Tourism Commission	Tourism Saskatchewan
Atlantic Canada Tourism Partnership	Parks Canada Agency
Department of Canadian Heritage	Tourism British Columbia
Alberta Tourism, Parks, Recreation and Culture	Government of Yukon
Government of Northwest Territories	Statistics Canada

The survey was conducted in Canada and the United States between January 2006 and June 2006 and it includes only adults (18 years and over). The reference period for the data is 2004 and 2005.

The Canadian database is used in this current report. This survey was conducted by Statistics Canada. 31,699 completed questionnaires were returned. The data have been weighted to project the results to the Canadian population.

This report profiles out-of-province Canadians who visited British Columbia while on a trip and compares them with other Canadian Pleasure Travelers (i.e., those who took at least one pleasure trip or vacation in the last two years). This report is part of a series of eight reports reviewing out-of-province Canadian travelers to specific destinations within Canada prepared using the Canadian TAMS database.

Canadian Travelers to British Columbia

Market Incidence

Over the last two years, 16.9% of adult Canadians (3,631,615) took an overnight trip to the province of British Columbia (for any purpose). 76.1% (2,763,250) of those who took a trip to British Columbia report taking a “pleasure trip” to the province. Overall, 17.5% of Canadian Pleasure Travelers reported taking at least one pleasure trip to British Columbia during the past two years. Among those who took a pleasure trip to British Columbia, 49.0% took two or more pleasure trips to the province in the last two years, the second highest repeat visitor rate in Canada (behind the Atlantic Region).

During the past two years, British Columbia was the second most frequently visited Canadian destination by Canadian Pleasure Travelers who visited another province (behind Ontario).

Fig. 1 Incidence of Trips¹ to British Columbia during the Past Two Years

	British Columbia
Number of Out-of-Province Canadians Taking a Trip to Province (Any Purpose) ²	3,631,615
Percent of Canadian Population	16.9%
Number of Out-of-Province Canadians Taking a Pleasure Trip to Province ³	2,763,250
Percent of Canadian Pleasure Travelers ⁴	17.5%
Percent of Canadian Pleasure Travelers Taking Two or More Pleasure Trips to Province ⁵	49.0%

- 1 - “Trips” are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.
- 2 - Defined as individuals who took at least one overnight trip to British Columbia in the last two years for any purpose.
- 3 - This row reports the number of the out-of-province Canadians who took a “pleasure trip” to British Columbia during the past two years.
- 4 - “Pleasure Travelers” are defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years. This row reports the percent of out-of-province Canadian “Pleasure Travelers” who took a trip to British Columbia.
- 5 - This row reports the percent of out-of-province Canadian Pleasure Travelers who visited British Columbia who took two or more pleasure trips to British Columbia during the last two years.

Incidence by Region

Those who took a pleasure trip to British Columbia are most likely to live in Alberta and Saskatchewan. Those from Quebec and the Atlantic Region were the least likely to have taken a pleasure trip to British Columbia during the last two years.

Fig. 2 Geographic Distribution of Those Who Took a Trip to British Columbia

	Population	Estimated Number Who Took a Pleasure Trip to British Columbia	Percent of Pleasure Travelers Who Took a Pleasure Trip to British Columbia	Percent of Total Population Who Took a Pleasure Trip to British Columbia
Canada	21,449,927	2,763,250	17.5%	14.3%
Atlantic Provinces	1,822,494	85,978	6.8%	5.7%
Quebec	5,940,869	228,359	5.4%	4.4%
Ontario	9,671,592	868,371	12.1%	10.0%
Manitoba	843,107	150,456	25.3%	20.3%
Saskatchewan	706,325	198,938	36.7%	30.6%
Alberta	2,465,540	1,231,147	61.4%	54.3%

Demographic Profile

Relative the average Canadian Pleasure Traveler, visitors to British Columbia are slightly more likely to be either 18 to 24 years old or over the age of 64. They are more likely to have a university degree (35.6% vs. 30.3% overall) and to report a household income of \$100,000 or more (31.0% vs. 22.8% overall). Overall, visitors to British Columbia are more affluent than the average Canadian Pleasure Traveler.

Fig. 3 Demographic Profile of BC Visitors Relative to All Out-of-Province Cdn. Pleasure Travelers

Attribute	Size of Market	Took a Pleasure Trip to BC	Did Not Take a Pleasure Trip to BC ¹	Pleasure Travelers	Index ²
		2,763,250	13,013,837	15,777,088	100
Gender	Male	49.1%	48.8%	48.8%	101
	Female	50.9%	51.2%	51.2%	100
Age of Respondent	18 to 24	13.2%	12.7%	12.8%	103
	25 to 34	19.2%	19.5%	19.4%	98
	35 to 44	18.5%	21.3%	20.8%	89
	45 to 54	21.0%	20.1%	20.3%	104
	55 to 64	14.1%	14.0%	14.0%	101
	65 Plus	14.0%	12.3%	12.6%	111
Average Age		44.9	44.3	44.4	N/A
Marital Status	Not married	29.7%	32.7%	32.2%	92
	Married	70.3%	67.3%	67.8%	104
Parental Status	No children under 18	71.3%	70.7%	70.8%	101
	Children under 18	28.7%	29.3%	29.2%	98
Education	High school or less	32.2%	37.3%	36.4%	89
	Some post-secondary	11.9%	10.9%	11.1%	108
	Post-secondary diploma/certificate	20.2%	22.7%	22.3%	91
	University degree	35.6%	29.1%	30.3%	118
Household Income	Under \$20,000	4.2%	6.0%	5.7%	74
	\$20,000 to \$39,999	12.4%	14.6%	14.2%	87
	\$40,000 to \$59,999	14.5%	17.3%	16.8%	86
	\$60,000 to \$79,999	14.6%	15.0%	14.9%	97
	\$80,000 to \$99,999	12.7%	12.5%	12.5%	102
	\$100,000 or more	31.0%	21.1%	22.8%	136
	Not stated	10.6%	13.4%	12.9%	82
Average Household Income		\$80,285	\$71,331	\$72,941	N/A

1 - Defined as an individual who took at least one out-of-town, overnight pleasure trip of one or more nights in the last two years but did not go to British Columbia on any trip.

2 - The "Index" is calculated by dividing the percent for those who visited British Columbia in each group by the percent of Canadian Pleasure Travelers in each group. The Index indicates the extent to which visitors are over or under-represented relative to the average out-of-province Canadian Pleasure Traveler. An index of 100 means the percent of visitors is the same as that of the average out-of-province Canadian Pleasure Traveler. Index values over 100 indicate that visitors are over-represented relative to the average out-of-province Canadian Pleasure Traveler. Index values less than 100 indicate that visitors are under-represented relative to the average out-of-province Canadian Pleasure Traveler.

Travel Activity (During Last Two Years)

Those who visited British Columbia during the last two years are frequent travelers, with 64.0% taking five or more pleasure trips in the last two years. (Note: 47.0% of Canadian Pleasure Travelers took five or more pleasure trips in the last two years). As such, they were more likely than the average Canadian Pleasure Traveler to have taken trips to the United States and Mexico and to overseas destinations.

Those who visited British Columbia also frequently traveled to other parts of Canada and especially Alberta (65.7%). Relative to other Canadian Pleasure Travelers, they were particularly likely to have traveled to Saskatchewan, Manitoba, the Yukon and the Northwest Territories during the last two years.

Fig. 4 Percent Traveling to Canada and Other Destinations during Past Two Years

	Took a Pleasure Trip to British Columbia	Did Not Take a Pleasure Trip to British Columbia	Pleasure Travelers	Index
Size of Market	2,763,250	13,013,837	15,777,088	100
Canada	100.0%	93.5%	94.6%	106
Took a trip within own province / region	85.3%	85.7%	85.7%	100
Took a trip to an adjacent province / region	81.5%	40.2%	47.4%	172
Took a trip to non-adjacent province / region	71.4%	22.2%	30.8%	232
Newfoundland & Labrador	3.8%	5.1%	4.9%	79
Prince Edward Island	8.0%	7.9%	8.0%	101
New Brunswick	13.7%	12.9%	13.0%	105
Nova Scotia	11.4%	15.0%	14.4%	79
Quebec	32.1%	46.2%	43.7%	73
Ontario	51.4%	60.4%	58.9%	87
Manitoba	20.5%	7.0%	9.4%	219
Saskatchewan	31.9%	7.2%	11.5%	277
Alberta	65.7%	13.5%	22.7%	290
British Columbia	100.0%	0.0%	21.1%	473
Yukon	2.8%	0.2%	0.7%	424
Northwest Territories	1.8%	0.3%	0.5%	330
Nunavut	0.5%	0.3%	0.3%	167
United States	59.9%	47.2%	49.4%	121
Mexico	16.8%	9.8%	11.0%	153
Caribbean	17.3%	16.7%	16.8%	103
All other destinations	25.1%	18.4%	19.6%	128

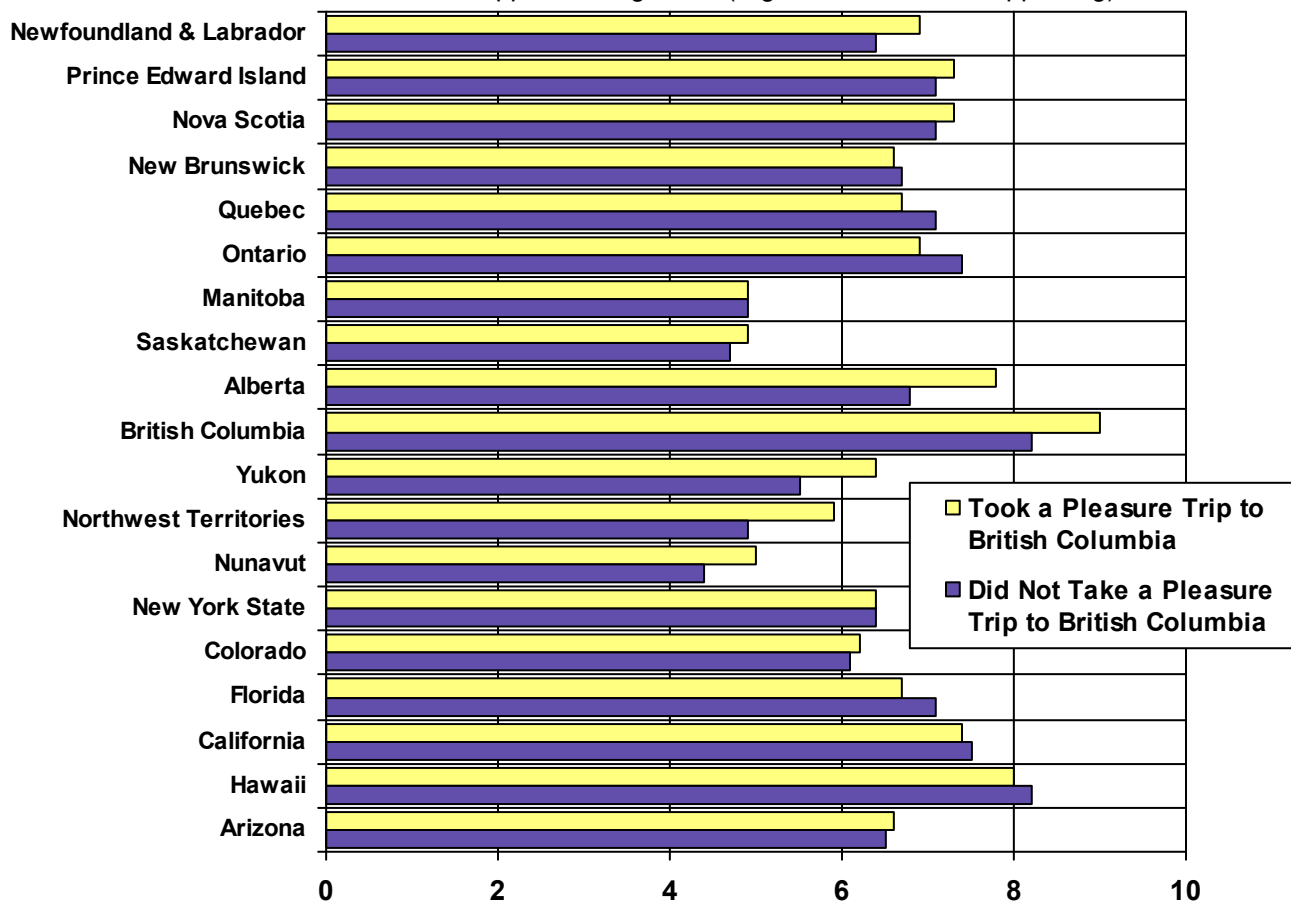
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

The respondents were asked to rate the appeal of each of Canada's provinces and territories on a ten-point appeal scale where "10" is "Very Appealing" and "1" is "Very Unappealing". They were also asked to rate selected U.S. states (New York State, Colorado, Florida, California, Hawaii and Arizona) to provide a frame of reference.

Canadian Travelers who visited British Columbia have a more favourable impression of British Columbia, Alberta and the Northern Territories than do other Canadian Pleasure Travelers. Not surprisingly, British Columbia (9.0) was considered the most appealing Canadian destination followed by Alberta (7.8), Prince Edward Island (7.3) and Nova Scotia (7.3).

The appeal ratings of the six U.S. reference states among British Columbia Visitors are similar to those of other Canadian Pleasure Travelers. Hawaii (8.0) was considered the most appealing U.S. destination.

Fig. 5 Overall Appeal Ratings of Provinces, Territories and Selected U.S. States on a 10-Point Appeal Rating Scale (Higher Scores=More Appealing)



Culture and Entertainment Activities Pursued While on Trips

Canadians who visited British Columbia are more likely than the average Canadian Pleasure Traveler to pursue culture and entertainment activities while on trips in the past two years. The most frequent activities included shopping and dining and visits to historical sites, museums and art galleries. However, relative to the average Canadian Pleasure Traveler, British Columbia Visitors were much more likely to have attended equestrian and western events and other sporting events (e.g., professional sports events, national & international sports), wine, beer and food tastings and spas. Visitors to British Columbia were also more likely than others to have taken part in educational, participatory activities (e.g., aboriginal cultural experiences, participatory historical activities), to have attended live art performances (e.g., musical concerts, high art performances, live theatre) and to have visited educational exhibits (e.g., science & technology exhibit, garden-themed attractions) while on a trip during the last two years.

Fig. 6 Culture and Entertainment Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Culture & Entertainment Activity)

	Took a Pleasure Trip to British Columbia	Did Not Take a Pleasure Trip to British Columbia	Pleasure Travelers	Index
Size of Market	2,763,250	13,013,837	15,777,088	100
Shopping & Dining	90.2%	80.5%	82.2%	110
Historical Sites, Museums & Art Galleries	71.1%	54.6%	57.5%	124
Theme Parks & Exhibits	49.0%	36.9%	39.0%	126
Fairs & Festivals	44.1%	35.6%	37.1%	119
Musical Concerts, Festivals & Attractions	41.4%	31.3%	33.0%	125
Wine, Beer & Food Tastings	34.4%	20.5%	22.9%	150
Casinos	29.8%	25.1%	26.0%	115
Science & Technology Exhibits	29.5%	21.6%	23.0%	128
Garden Theme Attractions	27.1%	15.1%	17.2%	157
Live Theatre	26.1%	21.0%	21.9%	119
Professional Sporting Events	22.1%	14.1%	15.5%	143
Agro-Tourism	19.1%	14.8%	15.5%	123
Aboriginal Cultural Experiences	16.5%	8.9%	10.3%	161
Amateur Tournaments	16.3%	11.3%	12.1%	134
High Art Performances	14.3%	10.4%	11.1%	130
Spas	14.3%	8.8%	9.8%	146
Comedy Festivals & Clubs	11.8%	10.3%	10.5%	112
Equestrian & Western Events	11.2%	5.5%	6.5%	173
Participatory Historical Activities	10.5%	5.5%	6.4%	164
National & International Sporting Events	5.2%	2.9%	3.3%	159
Literary & Film Festivals	3.4%	2.2%	2.4%	140

Culture and Entertainment Activities Pursued While Not on Trips

Canadian Pleasure Travelers who took a pleasure trip to British Columbia are also very active in culture and entertainment activities while NOT traveling. They frequently dine in local restaurants and attend local festivals or fairs. Relative to other Canadian Pleasure Travelers, those who visited British Columbia are especially likely to attend rodeos and other sports events (e.g., amateur sporting events, professional sporting events). They also are more likely to enjoy an eclectic array of local, live music performances ranging from the high arts (classical music concerts, the ballet, the opera) to jazz clubs and rock concerts. Visitors to British Columbia are also more likely than others to visit local museums and art galleries as well as local bars with rock music.

Fig. 7 Culture and Entertainment Activities Pursued While Not on Trips

	Took a Pleasure Trip to British Columbia	Did Not Take a Pleasure Trip to British Columbia	Pleasure Travelers	Index
Size of Market	2,763,250	13,013,837	15,777,088	100
Going out to eat in restaurants	94.1%	91.0%	91.6%	103
Going to festivals or fairs	64.7%	60.5%	61.2%	106
Going to amateur sporting events	49.2%	40.1%	41.7%	118
Going to historic sites or heritage buildings	43.3%	38.4%	39.2%	110
Going to pick-your-own farms or farmers' market	42.3%	40.0%	40.4%	105
Going to live theatre	40.5%	33.7%	34.9%	116
Going to museums	39.1%	31.0%	32.4%	121
Going to professional sporting events	39.0%	30.5%	32.0%	122
Going to art galleries or art shows	37.1%	30.3%	31.5%	118
Going to zoos or aquariums	34.2%	29.6%	30.4%	113
Going to bars with live pop or rock bands	31.8%	27.1%	27.9%	114
Going dancing	30.0%	30.8%	30.6%	98
Going to amusement or theme parks	29.9%	29.4%	29.5%	101
Going to rock music concerts	28.0%	21.4%	22.5%	124
Going to botanical gardens	27.5%	24.5%	25.1%	110
Going to classical music concerts	20.6%	15.2%	16.1%	128
Going to gamble in casinos	20.2%	17.5%	18.0%	112
Going to day spas	17.6%	12.9%	13.7%	128
Going to rodeos	16.3%	5.2%	7.2%	228
Going to jazz clubs	10.2%	6.7%	7.3%	139
Going to the ballet	10.1%	6.6%	7.2%	141
Staying overnight in a hotel or B&B in own city	10.1%	9.8%	9.9%	102
Going to the opera	8.1%	6.0%	6.3%	128

Outdoor Activities Pursued While on Trips

Relative to the average Canadian Pleasure Traveler, those who visited British Columbia were much more active in outdoor activities while on trips during the past two years.

The majority of British Columbia Visitors participated in ocean activities, wildlife viewing, and boating and swimming while on trips. However, relative to the typical Canadian Pleasure Traveler, those who visited British Columbia were especially likely to go downhill skiing and snowboarding, golfing and to participate in fitness activities. They were also much more active in nature-oriented activities (e.g., hiking, climbing & paddling, wildlife viewing, horseback riding), sports and games (e.g., tennis) and freshwater scuba diving and snorkeling. In fact, hunting was the only outdoor activity in which British Columbia Visitors were less likely to participate in while on trips.

Fig. 8 Outdoor Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Outdoor Activity)

	Took a Pleasure Trip to British Columbia	Did Not Take a Pleasure Trip to British Columbia	Pleasure Travelers	Index
Size of Market	2,763,250	13,013,837	15,777,088	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	55.6%	46.4%	48.0%	116
Wildlife Viewing	54.3%	37.5%	40.4%	134
Boating & Swimming (e.g., motorboating, swimming in lakes)	51.8%	39.1%	41.4%	125
Hiking, Climbing & Paddling	45.4%	30.7%	33.3%	136
Sports & Games (e.g., tennis, board games)	30.4%	21.5%	23.1%	132
Golfing	28.4%	16.3%	18.5%	154
Downhill Skiing & Snowboarding	25.0%	12.0%	14.3%	174
Fishing	24.2%	23.7%	23.8%	102
Exercising & Jogging	22.7%	13.8%	15.3%	148
Cycling	18.7%	12.2%	13.3%	141
Skating (e.g., ice skating, rollerblading)	16.5%	11.7%	12.5%	131
Team Sports (e.g., hockey, baseball)	14.4%	11.0%	11.6%	124
Snowmobiling & ATVing	14.3%	11.2%	11.7%	122
Cross-country Skiing & Snowshoeing	12.8%	8.8%	9.5%	134
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	8.7%	5.8%	6.3%	138
Horseback Riding	7.4%	4.2%	4.8%	155
Freshwater Scuba & Snorkeling	4.7%	2.6%	3.0%	157
Motorcycling	3.8%	2.7%	2.9%	129
Hunting	3.7%	5.0%	4.8%	77
Wilderness Activities (e.g., wilderness skills course)	3.0%	2.0%	2.2%	136
Extreme Air Sports (e.g., parachuting)	1.8%	0.9%	1.0%	176

Outdoor Activities Pursued While Not on Trips

When NOT traveling, Canadians who visited British Columbia remain highly active in outdoor activities. The majority go on day outings to local parks and picnic, exercise, swim, garden and hike while not traveling. Relative to the average Canadian Pleasure Traveler, visitors to British Columbia are especially likely to participate in nature-oriented activities (e.g., hiking, camping, canoeing and kayaking, horseback riding). They are also more likely to go skiing and snowboarding, play golf and participate in fitness activities (e.g., jogging, exercising, cycling) while not on trips. On the other hand, those who visited British Columbia are less likely than average to go fishing or hunting.

Fig. 9 Outdoor Activities Pursued While NOT on Trips

	Took a Pleasure Trip to British Columbia	Did Not Take a Pleasure Trip to British Columbia	Pleasure Travelers	Index
Size of Market	2,763,250	13,013,837	15,777,088	100
Day outing to a park	72.7%	63.5%	65.1%	112
Exercising at home or at a fitness club	68.0%	58.4%	60.1%	113
Swimming	63.0%	59.6%	60.2%	105
Gardening	61.2%	58.7%	59.1%	103
Hiking	55.8%	46.0%	47.7%	117
Picnicking	55.7%	50.8%	51.7%	108
Cycling	48.3%	43.9%	44.7%	108
Camping	46.4%	35.6%	37.5%	124
Golfing	37.5%	28.1%	29.7%	126
Ice-skating	31.2%	29.6%	29.8%	105
Jogging	28.2%	22.1%	23.2%	122
Sailing or other boating	27.0%	21.7%	22.6%	119
Fishing	26.8%	30.0%	29.4%	91
Playing team sports	24.8%	22.6%	23.0%	108
Downhill skiing	22.9%	14.7%	16.2%	142
Playing racquet sports (e.g., tennis or badminton)	19.6%	18.7%	18.8%	104
Canoeing or kayaking	18.4%	16.5%	16.8%	109
Rollerblading	16.2%	14.9%	15.1%	108
Riding an all-terrain vehicle (ATV)	15.2%	14.7%	14.8%	103
Cross-country skiing	14.3%	12.7%	12.9%	111
Snowmobiling	10.4%	10.7%	10.6%	97
Snowboarding	8.2%	4.0%	4.7%	174
Horseback riding	8.0%	6.7%	6.9%	116
Hunting	6.6%	8.1%	7.8%	84
Skateboarding	1.8%	1.5%	1.5%	120

Accommodation Stayed In While on Trips

Visitors to British Columbia most often stayed in public or private campgrounds or resorts (e.g., lakeside or riverside resorts, seaside resorts, ski or mountain resorts) during the last two years. However, relative to the average Canadian Pleasure Traveler, those who visited British Columbia were especially likely to have stayed in ski or mountain resorts. They were also more likely to have stayed in a wilderness setting (e.g., campsite, remote wilderness lodge or outpost), to have toured in a motor home or houseboat and to have stayed at a farm or guest ranch during the last two years.

Fig. 10 Accommodation Stayed In While on Trips

	Took a Pleasure Trip to British Columbia	Did Not Take a Pleasure Trip to British Columbia	Pleasure Travelers	Index
Size of Market	2,763,250	13,013,837	15,777,088	100
A Public Campground in a National, State, Provincial or Municipal Park	35.3%	23.4%	25.5%	138
Lakeside / Riverside Resort	29.3%	20.6%	22.1%	133
Ski Resort or Mountain Resort	27.2%	10.0%	13.0%	209
Seaside Resort	25.4%	18.3%	19.6%	130
A Private Campground	25.0%	16.8%	18.3%	137
A Camp Site in a Wilderness Setting (Not a Campground)	11.8%	6.9%	7.8%	151
Health Spa	8.0%	5.6%	6.0%	133
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	7.8%	3.3%	4.1%	191
Wilderness Lodge You Can Drive to by Car	6.2%	5.7%	5.8%	108
Country Inn or Resort with Gourmet Restaurant	5.0%	5.2%	5.2%	98
Farm or Guest Ranch	4.2%	2.4%	2.7%	157
On a Houseboat	3.3%	0.9%	1.3%	255
Remote or Fly-In Wilderness Lodge	3.1%	1.2%	1.5%	208
Remote or Fly-In Wilderness Outpost	1.0%	0.4%	0.5%	201
Cooking School	0.4%	0.4%	0.4%	114
Wine Tasting School	0.1%	0.2%	0.2%	61

Tours and Cruises Taken During Past Two Years

Those who visited British Columbia were much more likely than the average Canadian Pleasure Traveler to have taken tours and cruises during the last two years. Sameday tours (both organized and self-guided), city tours and scenic countryside drives were the most popular types of tours taken by British Columbia Visitors. However, relative to other Canadian Pleasure Travelers, British Columbia Visitors were especially likely to have taken Alaskan cruises, tours of wineries or factories, wilderness tours, city tours and air tours in airplanes or helicopters in the past two years. They were also more likely than others to have taken a multi-location, self-guided tour during the last two years. The popularity of tours and cruises among visitors to British Columbia suggest that this may be an effective method by which to attract Canadians to this destination.

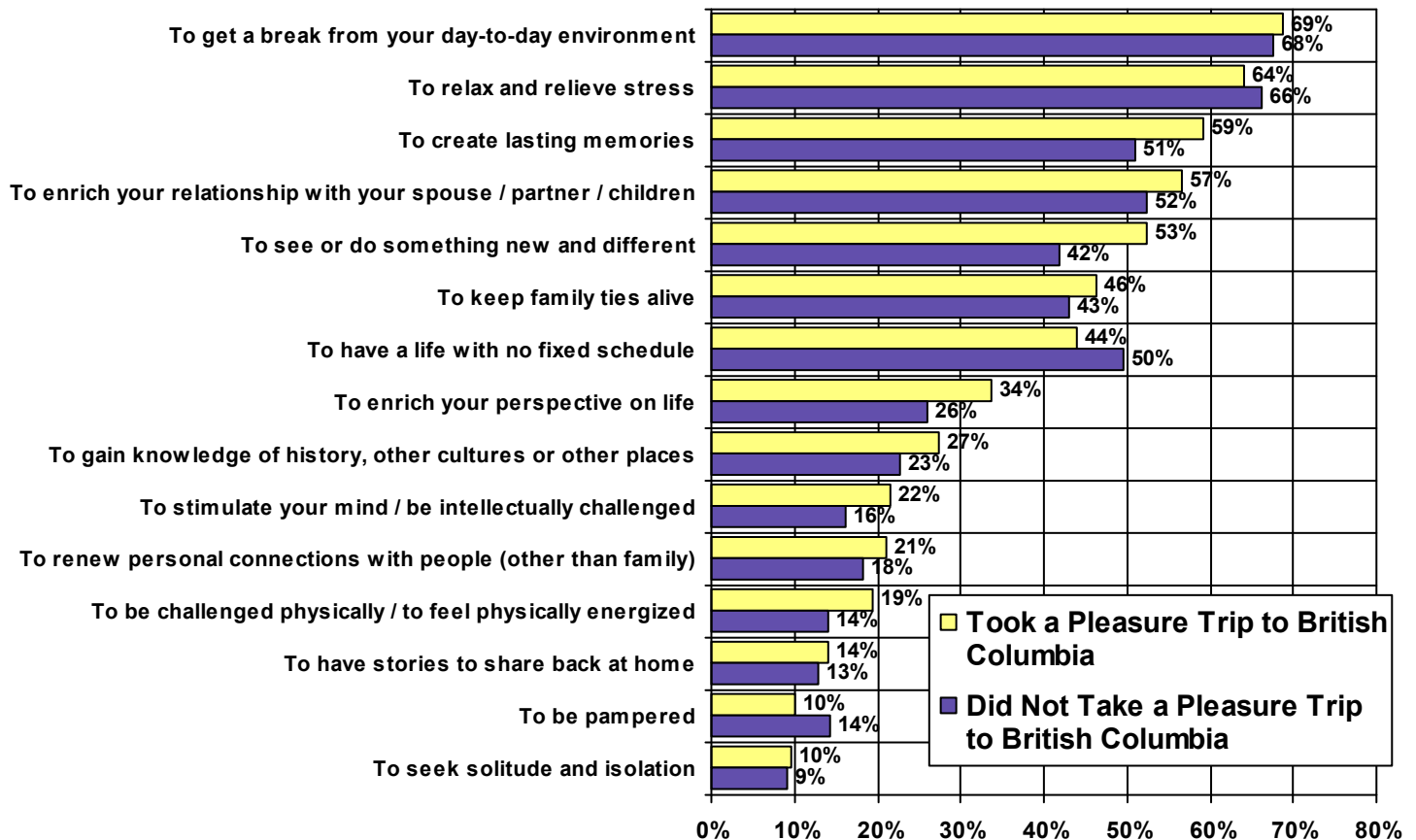
Fig. 11 Tours and Cruises Taken During Past Two Years

	Took a Pleasure Trip to British Columbia	Did Not Take a Pleasure Trip to British Columbia	Pleasure Travelers	Index
Size of Market	2,763,250	13,013,837	15,777,088	100
A self-guided, sameday tour while on an overnight trip	39.4%	26.8%	29.0%	136
An organized, sameday guided tour while on an overnight trip	31.3%	19.7%	21.7%	144
Around the city	31.3%	21.0%	22.8%	137
Around the countryside - scenic drives	29.2%	20.8%	22.3%	131
A self-guided, overnight tour where you stayed in different locations	24.9%	16.1%	17.6%	141
On the water (sightseeing cruise)	19.1%	11.8%	13.1%	146
Wilderness tour	18.7%	12.0%	13.2%	142
Some other type of tour	13.2%	8.1%	9.0%	147
An organized, overnight guided tour where you stayed in different locations	13.0%	9.3%	9.9%	131
To a winery	10.3%	4.4%	5.4%	190
An organized, overnight guided tour where you stayed in a single location	8.6%	7.6%	7.8%	110
To a casino	8.0%	6.3%	6.6%	121
Caribbean ocean cruise	7.2%	5.4%	5.7%	126
Ocean cruise – Other	5.0%	2.4%	2.8%	177
To a factory	4.0%	2.1%	2.5%	163
Alaskan ocean cruise	3.7%	0.7%	1.2%	313
Cruise on another lake or river	3.2%	2.5%	2.6%	123
In the air as a pilot or passenger of an airplane or helicopter	3.0%	1.4%	1.7%	176
Some other type of cruise	2.3%	1.3%	1.5%	150
Cruise on the St. Lawrence River	1.0%	2.5%	2.3%	46
Great Lakes cruise	0.7%	1.0%	0.9%	72
Submarine cruise	0.3%	0.1%	0.1%	231

Benefits Sought While on Vacation

Similar to other Canadian Pleasure Travelers, those who visited British Columbia take vacations to get a break from their day-to-day environment, relax and relieve stress, create lasting memories and enrich family relationships. However, those who visited British Columbia prefer vacations that are physically challenging as well as intellectually stimulating. They look for novelty and opportunities for learning as well as a chance to enjoy nature and participate in outdoor activities.

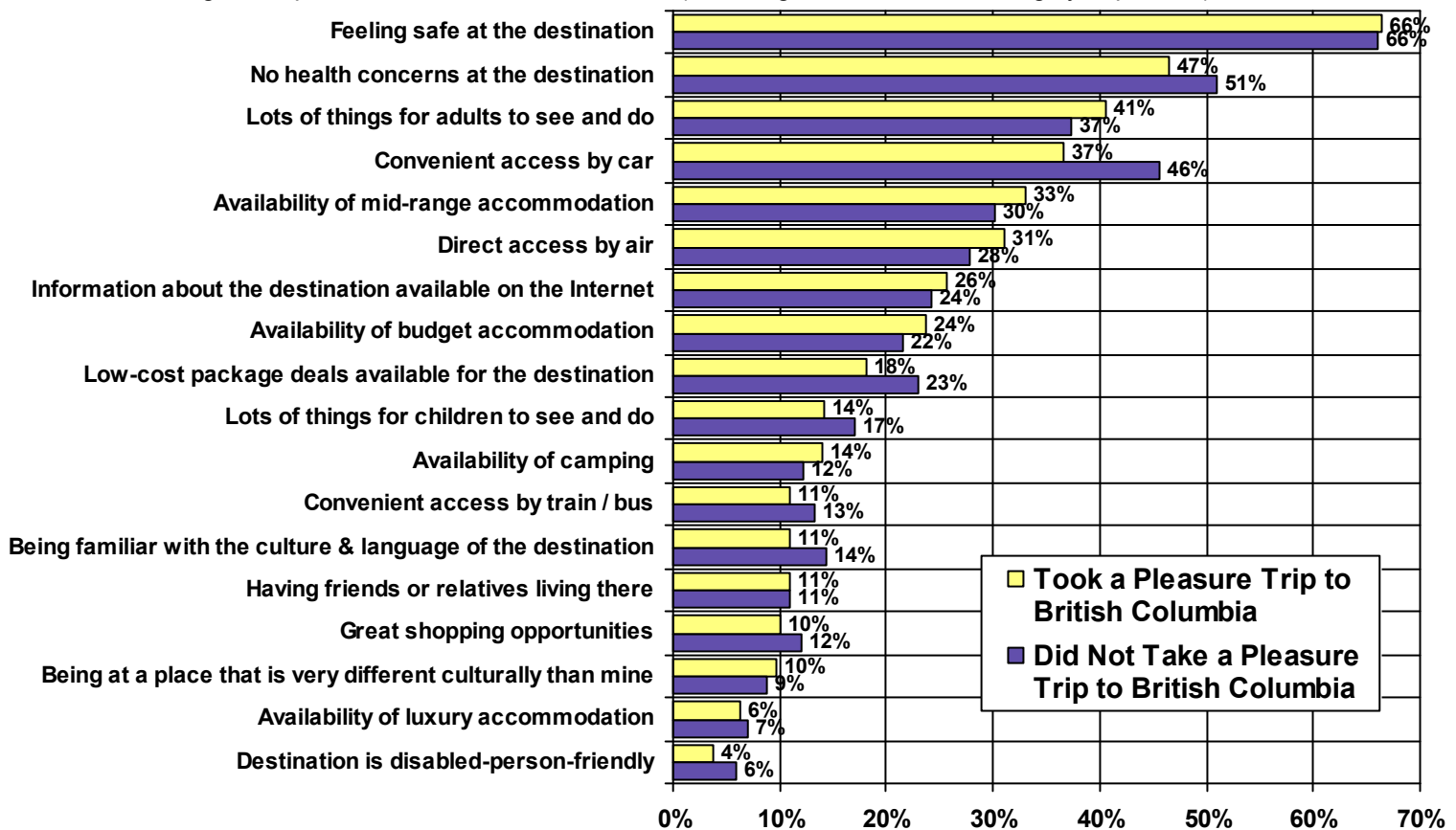
Fig.12 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

As with most other Canadian Pleasure Travelers, those who visited British Columbia are most likely to consider it important that they feel safe at a destination. However, relative to other Canadian Pleasure Travelers, visitors to British Columbia are more likely to prefer destinations that offer a distinctive culture, lots for adults to see and do and either camping or mid-range priced accommodation. They consider it less important that a destination is readily accessible by car, train or bus, has lots of activities for children, has low-cost packages deals available or is suitable for persons with disabilities.

Fig. 13 Importance of Destination Attributes (% Rating Each Attribute as "Highly Important")



How Destinations Are Selected

Those who visited British Columbia are more likely than other Canadian Pleasure Travelers to begin planning summer and winter vacations with a particular destination in mind. However, for winter trips, British Columbia Visitors are more likely to begin vacation planning by first considering what types of activities they would like to do.

Fig. 14 How Destinations Are Selected (Summer and Winter Vacations)

	Took a Pleasure Trip to British Columbia	Did Not Take a Pleasure Trip to British Columbia	Pleasure Travelers	Index
Size of Market	2,763,250	13,013,837	15,777,088	100
Summer				
Started with a desired destination in mind	53.6%	46.3%	47.6%	113
Started by considering specific activities wanted to do	14.3%	14.4%	14.4%	100
Started with a certain type of vacation experience in mind	21.4%	24.1%	23.6%	91
Looked for packaged deals - no destination in mind	1.5%	1.4%	1.4%	105
Considered something else first	3.2%	4.4%	4.2%	76
Don't know / Other	6.0%	9.4%	8.8%	68
Winter				
Started with a desired destination in mind	50.9%	47.3%	48.0%	106
Started by considering specific activities wanted to do	19.2%	15.0%	15.9%	121
Started with a certain type of vacation experience in mind	18.3%	18.8%	18.7%	98
Looked for packaged deals - no destination in mind	2.0%	3.8%	3.4%	59
Considered something else first	2.9%	5.3%	4.8%	61
Don't know / Other	6.7%	9.9%	9.2%	73

Trip Planning and Information Sources Consulted

Similar to the average Canadian Pleasure Traveler, most of those who took a trip to British Columbia were responsible for planning their trips either on their own (43.0%) or with someone else (16.1%). When making vacation plans, they tend to consult a wider variety of information sources than the average Canadian Pleasure Traveler. The majority of British Columbia Visitors use Internet websites, past experience and word-of-mouth as sources for travel information. However, relative to the average Canadian Pleasure Traveler, visitors to British Columbia are more likely to consult travel guidebooks such as Fodor's, maps, television programs, auto clubs and official government tourism guidebooks and visitor information centres.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Took a Pleasure Trip to British Columbia	Did Not Take a Pleasure Trip to British Columbia	Pleasure Travelers	Index
	Size of Market	2,763,250	13,013,837	15,777,088	100
Who Plans Trips?	Respondent plans trips	43.0%	41.5%	41.8%	103
	Trip planning a shared responsibility	16.1%	16.3%	16.2%	99
	Someone else plans trips	41.0%	42.2%	42.0%	98
Information Sources Consulted	An Internet website	74.1%	62.1%	64.4%	115
	Past experience / Been there before	59.3%	47.9%	50.0%	119
	Advice of others / Word-of-mouth	58.6%	49.0%	50.8%	115
	Maps	45.4%	28.4%	31.6%	144
	A travel agent	39.3%	31.9%	33.2%	118
	Official travel guides or brochures from state / province	33.6%	24.7%	26.4%	127
	Visitor information centres	29.4%	22.0%	23.4%	126
	Articles in newspapers / magazines	25.3%	19.8%	20.9%	121
	An auto club such as CAA	23.5%	16.1%	17.5%	134
	Travel guide books such as Fodor's	20.8%	11.2%	13.0%	160
	Advertisements in newspapers / magazines	15.0%	14.4%	14.5%	104
	Travel information received in the mail	10.6%	9.2%	9.5%	113
	Programs on television	10.1%	6.4%	7.1%	142
	An electronic newsletter or magazine received by e-mail	5.2%	3.9%	4.1%	127
	Advertisements on television	4.8%	5.1%	5.1%	95
	Visits to trade, travel or sports shows	4.6%	3.0%	3.3%	138

Use of the Internet to Plan and Arrange Trips

Canadian Pleasure Travelers who visited British Columbia are above-average users of the Internet to plan (70.7%) and book travel (51.3%). The majority use hotel or resort websites, airline websites and the official tourism websites of countries, regions or cities. They are especially likely to use travel planning / booking websites such as Expedia and more likely than others to visit the websites of cruise lines. As with most Canadian Pleasure Travelers, British Columbia Visitors most often use the Internet to purchase airline tickets and accommodation. However, they are more likely than others to use the Internet to purchase airline tickets, book car rentals and buy tickets for travel by rail, bus or boat / ship.

Fig. 16 Use of the Internet to Plan and Book Travel

		Took a Pleasure Trip to British Columbia	Did Not Take a Pleasure Trip to British Columbia	Pleasure Travelers	Index
	Size of Market	2,763,250	13,013,837	15,777,088	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	29.3%	44.7%	42.0%	70
	Uses Internet to plan trips only	19.4%	23.4%	22.7%	85
	Uses Internet to book part of trip	51.3%	31.9%	35.3%	145
Types of Websites Consulted	A website of a hotel or resort	62.9%	54.9%	56.6%	111
	An airline website	62.2%	39.1%	44.1%	141
	A tourism website of a country / region / city	55.9%	49.2%	50.6%	110
	A travel planning / booking website	55.0%	42.4%	45.1%	122
	A website of an attraction	37.2%	34.3%	34.9%	107
	Some other website	26.0%	28.1%	27.6%	94
	A cruise line website	10.6%	7.3%	8.0%	132
	A motorcoach website	2.7%	2.4%	2.5%	109
Parts of Trips Booked Over The Internet	Air tickets	83.5%	62.1%	67.6%	124
	Accommodation	69.1%	70.0%	69.8%	99
	Car rental	36.1%	23.7%	26.8%	134
	Tickets or fees for specific activities or attractions	24.6%	23.2%	23.5%	104
	Tickets for rail, bus or boat / ship fares	18.4%	14.0%	15.1%	122
	A package containing two or more items	16.6%	15.5%	15.8%	105
	Other	3.7%	3.7%	3.7%	100

Media Consumption Habits

Canadians who traveled to British Columbia are more likely than average to read the travel sections of newspapers and visit travel websites. This segment may also be effectively targeted through city lifestyle magazines, science and geography magazines, health and fitness magazines and sports-related media (e.g., outdoor activities/sports magazines, sports on television). They may also be effectively reached through country music and classical music radio stations as well as news / talk / information radio.

Fig. 17 Media Consumption Habits

		Took a Pleasure Trip to British Columbia	Did Not Take a Pleasure Trip to British Columbia	Pleasure Travelers	Index
	Size of Market	2,763,250	13,013,837	15,777,088	100
Newspaper Readership	Reads daily newspaper	86.6%	86.8%	86.8%	100
	Reads weekend edition of newspaper	87.0%	86.8%	86.9%	100
	Reads local neighbourhood or community newspapers	61.1%	59.0%	59.4%	103
	Reads other types of newspapers	18.7%	16.2%	16.6%	112
	Frequently or occasionally reads travel section of daily newspaper	50.4%	43.7%	44.9%	112
	Frequently or occasionally reads travel section of weekend newspaper	54.4%	45.4%	47.0%	116
Types of Magazines Read (Top 5 Indexed)	Outdoor activities / sports	16.2%	11.8%	12.6%	129
	Science and geography	20.8%	15.1%	16.1%	129
	Magazines about your city	14.2%	10.8%	11.4%	125
	Health, fitness and well living	25.3%	20.5%	21.3%	119
	Business, finance and investing	19.2%	15.6%	16.2%	119
Type of Television Programs Watched (Top 5 Indexed)	Sports / sports shows	46.8%	42.2%	43.0%	109
	Dramas (e.g., Law & Order)	60.4%	56.3%	57.0%	106
	Travel shows	30.6%	29.1%	29.4%	104
	Biography	43.7%	42.5%	42.7%	102
	History	42.1%	41.6%	41.7%	101
Type of Radio Programs Listened To (Top 5 Indexed)	Country music	28.2%	22.7%	23.7%	119
	Classical music	19.2%	16.4%	16.9%	114
	News / Talk / Information	42.4%	38.0%	38.8%	109
	Modern rock / Alternative rock	38.8%	37.3%	37.6%	103
	Soft music / Adult contemporary	25.6%	25.2%	25.3%	101
Types of Websites Visited (Top 5 Indexed)	Travel	59.8%	48.1%	50.3%	119
	Sites for specific activities or interests	37.9%	34.4%	35.0%	108
	Newspaper sites	34.2%	32.4%	32.7%	104
	Network news sites (e.g., CBC, CNN)	36.6%	35.0%	35.3%	104
	Weather	59.4%	56.9%	57.4%	104

Canadian TAMS 2006 Culture and Entertainment Segmentation

Activity Segment	Activities in Segment	
Historical Sites, Museums & Art Galleries	Well-known Historic Sites or Buildings	Well-known Natural Wonders
	Other Historic Sites, Monuments and Buildings	Historical Replicas of Cities or Towns With Historic Re-Enactments
	Strolling Around a City to Observe Buildings and Architecture	Museum - Military /War Museums
	Museum - General History or Heritage Museums	Art Galleries
		Paleontological/Archaeological Sites
Shopping & Dining	Shop Or Browse - Bookstore or Music Store	Shop Or Browse – Antiques
	Shop Or Browse - Clothing, Shoes and Jewellery	Shop Or Browse - Gourmet Foods in Retail Stores
	Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	Shop Or Browse - Greenhouse or Garden Centre
	Dining - Restaurants Offering Local Ingredients and Recipes	High-End Restaurants with an International Reputation
	Went to Local Outdoor Cafes	Other High-End Restaurants
Aboriginal Cultural Experiences	Aboriginal Cuisine (Tasted or Sampled)	Aboriginal Arts and Crafts Shows
	Aboriginal Heritage Attractions (e.g., Museums, Interpretive Centres)	Aboriginal Cultural Experiences in a Remote or Rural Setting
	Aboriginal Festivals & Events (e.g., Powwows)	Aboriginal Outdoor Adventure and /or Sports
Fairs & Festivals	Farmers' Markets or Country Fairs	Firework Displays
	Carnivals	Ethnic Festivals
	Exhibition or Fairs	Food /Drink Festivals
Science & Technology Exhibits	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
Theme Parks & Exhibits	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Entertainment Farms (e.g., Corn Maze, Petting Zoo)
	Wax Museums	
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	Professional Soccer Games
Live Theatre	Live Theatre	Live Theatre with Dinner
	Theatre Festivals	
Literary & Film Festivals	Literary Festivals or Events	International Film Festivals
Tastings	Went to Wineries for Day Visits and Tasting	Cooking /Wine Tasting Courses
	Went to Breweries for Day Visits and Tasting	Visited Food Processing Plants (e.g., Cheese Factory)
Casinos	Went to a Casino	
Spas	Day Visit to a Health & Wellness Spas while on an Overnight Trip	
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National / Provincial Park
	Curatorial Tours	Archaeological Digs
Equestrian & Western Events	Equine (Horse) Competitions	Western Theme Events (e.g., Rodeos)
	Horse Races	

Appendix One

Canadian TAMS 2006 Culture and Entertainment Segmentation

Activity Segment	Activities in Segment	
Agro-Tourism	Dining At A Farm	Harvesting and /or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	
National & International Sporting Events	Curling Bonspiel	National /International Sporting Events such as the Olympic Games
	Professional Figure Skating	
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related
Musical Concerts, Festivals & Attractions	Music Festivals	Musical Attractions
	Jazz Concert	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Rock & Roll/Popular Music Concert	Country & Western Music Concert
Comedy Festivals & Clubs	Comedy Festivals	Stand-up Comedy Clubs & Other Variety Shows

Appendix Two: Canadian TAMS 2006 Outdoor Activity Segmentation

Activity Segment	Activities in Segment	
Golfing	Played During a Stay at a Golf Resort with Overnight Stay	Golf Tour Package to Play on Various Courses
	Played an Occasional Game While on a Trip	
Hunting	Hunting for Small Game	Hunting for Birds
	Hunting for Big Game	
Fishing	Fresh-Water Fishing	Salt-Water Fishing
	Ice Fishing	Trophy Fishing
Wildlife Viewing	Viewing Land Based Animals	Bird Watching
	Whale Watching & Other Marine Life	Visited National, Provincial / State Park
	Wildflowers / Flora Viewing	Viewing Northern Lights
Hiking, Climbing & Paddling	Mountain Climbing / Trekking	Fresh Water Kayaking / Canoeing
	Rock Climbing	Ocean Kayaking / Canoeing
	Hiking / Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
		White Water Rafting
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkeling in Sea / Ocean
	Sunbathing, Sitting on a Beach	Scuba Diving in Sea/Ocean
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Freshwater Scuba & Snorkeling	Scuba Diving in Lakes / Rivers	Snorkeling in Lakes / Rivers
Exercising & Jogging	Working Out in Fitness Centre	Jogging or Exercising Outdoors
Cycling	Overnight Touring Trip	Recreational - Same Day Excursion
	Mountain Biking	
Motorcycling	Overnight Touring Trip	Same Day Excursion
Horseback Riding	With an Overnight Stop	Same Day Excursion
Snowmobiling & ATVing	All Terrain Vehicle - Overnight Touring Trip	Snowmobiling As an Overnight Touring Trip
	All Terrain Vehicle - Same Day Excursion	Snowmobiling Day Use on Organized Trail
Downhill Skiing & Snowboarding	Snowboarding	Downhill Skiing
Cross-country Skiing & Snowshoeing	Cross-country Skiing	Cross-country or Back Country as an Overnight Touring Trip
	Snowshoeing	
Wilderness Activities	Wilderness Skills Courses	Dog Sledding
	Ice Climbing	
Skating	Ice Skating	In-Line / Rollerblading
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	
Team Sports	Ice Hockey	Curling
	Football	Basketball
	Baseball or Softball	Soccer
Sports & Games	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	