

**Spotlight on Canadian
Group & Learning Tourists
A Western Canada Perspective**

(TAMS 2006)

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TABLE OF CONTENTS

I. Introduction.....	4
A. BACKGROUND.....	4
B. CONTENT AND DEFINITIONS.....	5
1. <i>The Western Canada Report</i>	5
2. <i>About the Travel Activities and Motivation Survey (TAMS)</i>	7
II. Observations & Key Findings.....	8
III. Canadian Group Tourist & Learning Tourist Markets.....	13
A. AN OVERVIEW OF THE MARKET.....	13
1. <i>At the Canada Level</i>	13
2. <i>At the Regional Level</i>	15
3. <i>Touring Segments</i>	17
IV. Group Tourists in Western Canada.....	19
A. A MARKET OVERVIEW.....	19
B. CROSS-VISITATION IN WESTERN CANADA.....	22
C. GROUP TOURIST PROFILES.....	24
1. <i>Demographic Profiles</i>	24
a) Place of Residence.....	24
b) Personal and Household Characteristics.....	27
2. <i>Household Composition</i>	32
V. Competitive Destinations.....	33
A. WORLDWIDE DESTINATIONS FOR OVERNIGHT PLEASURE TRIPS.....	33
B. COMPETITIVE CANADIAN DESTINATIONS.....	34
C. COMPETITIVE U.S. DESTINATIONS.....	36
D. DESTINATIONS: ROLE & RATINGS.....	38
1. <i>Importance of Destination</i>	38
2. <i>Importance of Conditions in Destination Choice</i>	39
3. <i>Appeal of Various Destinations</i>	42
4. <i>Number of Good Reasons to Visit Various Destinations</i>	45
VI. Activities That Motivate Overnight Trips.....	47
A. INTRODUCTION.....	47
B. ACTIVITY-BASED TRIP MOTIVATORS.....	49
1. <i>Major Category Motivators</i>	49
2. <i>Intermediate Category Motivators</i>	51
a) Participatory Outdoor Activities.....	51
b) Cultural/Learning Activities & Events.....	53
c) Entertainment Activities & Events.....	54
d) Food & Wine Activities.....	56
e) Lodging Activities & Shopping.....	57
VII. Trip Planning.....	59
A. WHO DOES THE PLANNING?.....	59
B. TRAVEL INFORMATION SOURCES & TRAVEL MEDIA.....	60
C. INTERNET USE FOR TRAVEL INQUIRIES & BOOKINGS.....	63

VIII. Other Travel-Related Information..... 65

- A. USE OF PACKAGE DEALS..... 65
- B. BENEFITS SOUGHT FROM PLEASURE TRAVEL 66
- C. INCIDENCE OF SUMMER/WINTER TRIPS 68
- D. INCIDENCE OF OVERNIGHT CRUISES..... 69
- E. MEMBERSHIPS IN VARIOUS ORGANIZATIONS 70

IX. Appendices 71

- A. ACTIVITY-BASED TRIP MOTIVATORS – MAJOR & INTERMEDIATE CATEGORIES..... 72
- B. DETAILED PLACE OF RESIDENCE SUMMARY TABLE 73
- C. TRIP ACTIVITY GROUPINGS 74
- D. “LIFE STAGES” VARIABLE 80

I. Introduction

A. Background

This report provides information on the Canadian overnight group tour market for Western Canada: overnight group tourists who have taken overnight pleasure trips to destinations in Alberta and/or British Columbia over a two-year period. It is a companion piece to a report providing descriptions of this market at the Canada level (*Spotlight on Canadian Group & Learning Tourists: A National Perspective, July 2007*).

Findings are based on information collected in the 2006 Travel Activity and Motivation Survey (TAMS). Research Resolutions & Consulting Ltd. undertook the project on behalf of the five tourism organizations listed below and prepared this report for Alberta Tourism, Parks, Recreation and Culture and Tourism British Columbia.

1. Alberta Tourism, Parks, Recreation and Culture (ATPRC)
2. Department of Canadian Heritage (PCH)
3. Parks Canada
4. Tourism British Columbia (TBC)
5. Travel Manitoba

The TAMS partners listed above supplied Research Resolutions with the TAMS file specifically for this analysis.

B. Content and Definitions

1. The Western Canada Report

This overview report contains demographic, trip activity, attitudinal and travel planning profiles of Canadian adults who claim to have taken an overnight pleasure trip to Alberta and/or British Columbia in the past two years or so and are **Group Tourists** (have taken an organized overnight group tour in the past two years).¹

In addition to the western overview, this report provides information about *each* of the two western provinces individually. Thus, tourism planners and marketers in British Columbia and Alberta can examine the profile and characteristics of their *own* Group Tourists.

This report parallels a report on the U.S. group and learning markets (*Spotlight on American Group & Learning Tourists: A Western Perspective*²). Direct comparisons between the demographic, behavioural and attitudinal characteristics of Group Tourists highlighted in these two reports should be made with extreme care for three reasons:

Note to Readers

Group tour experiences and locations visited in Canada are *independent* of one another.

In other words, the Canadian tourists featured in this analysis claim to have taken organized overnight group tours in the past two years or so but their group tour experiences may or may not have occurred at the Canadian destinations they claim to have visited over the same time period.

The type of tourists featured in each report is fundamentally different.

- The American Group Tourists described in detail in *Spotlight on American Group & Learning Tourists: A Western Perspective* are U.S. tourists who have recently taken an overnight pleasure trip to at least one *foreign country* (Canada). They are, in essence, *international travellers*.
- In contrast, the Canadian report describes a subset of a *domestic* travel market – Canadians travelling *within* their own country.³

¹ Since fieldwork for the study was conducted between January and June 2006, the “past two years” likely refers to 2004 and 2005. It is important to note, however, that when asked to report travel activities over a two-year period, consumers are prone to imprecision by focussing on “salient trips” (most memorable, most expensive, etc.) and/or by “telescoping” the specified time period (extending the time frame over which trips are reported beyond the specified two years). In light of this potential imprecision, a liberal interpretation of the “reference period” is advised. Throughout this report, the terms “past two years or so” and “recent” are commonly used to describe the “past two year” recall period.

² Under separate cover, issued by Research Resolutions & Consulting Ltd. in February 2007.

³ To obtain a direct equivalent with the individuals featured in the U.S. report, the Canadian Group Tourist would be the subset of this group who took overnight pleasure trips to the U.S. and/or other countries over the past two years.

Methodology and supplier differences.

- The survey methodology (mail panel) and the supplier (TNS Canadian Facts) selected to capture information on the American market differ from those used for the Canadian survey (modified RDD telephone survey/self-completion mail back follow-up; Statistics Canada). These methodological and supplier differences undoubtedly have *design effect* impacts on the findings and render them incomparable.

Different boundaries for *Western Canada*.

- The U.S. report included the Yukon in *Western Canada* whereas only Alberta and British Columbia are included in the Canadian report.

2. About the Travel Activities and Motivation Survey (TAMS)

The 2006 Travel Activity and Motivation Survey (TAMS) was sponsored by the following organizations:

Alberta Tourism, Parks, Recreation and Culture ⁴	Ontario Tourism Marketing Partnership
Atlantic Canada Tourism Partnership	Parks Canada
Canadian Tourism Commission	Quebec Ministry of Tourism
Department of Canadian Heritage	Statistics Canada
Government of Northwest Territories	Tourism British Columbia
Government of Yukon	Tourism Manitoba
Ontario Ministry of Tourism	Tourism Saskatchewan

Statistics Canada conducted the Canada portion of the study between January and June 2006. The universe under study was defined to be Canadian adults (18 years and over). The study consisted of a telephone survey using a disproportional sample of randomly generated telephone numbers in Canada's ten provinces, followed by a mailback survey among selected respondents. The overall response rate to the telephone survey was approximately 56%. Canadian adults who claimed to have taken an overnight out-of-town trip over the two years preceding the fieldwork qualified to receive the paper questionnaire. The response rate to this mailback portion of the study was about 54%. Thus, the Canadian database consists of 53,150 completed records from the telephone survey and 24,692 completed paper questionnaires.⁵

Survey data were weighted and projected to the Canadian adult population based on Statistics Canada Census estimates of household size, age and gender at a variety of city/province and/or regional levels in the country's ten provinces.

Research Resolutions used the TAMS Canada data files provided by TAMS partners. As such, the firm takes no responsibility for the quality of the data or the accuracy of the weighting and projection processes.

⁴ Formerly *Alberta Economic Development*.

⁵ The base for all tabulations includes 24,692 Canadians who completed both the paper questionnaire and telephone interview and 7,007 who responded only to the telephone survey, for a total of 31,699 Canadian adults.

II. Observations & Key Findings

WESTERN CANADA ATTRACTS OVER ONE MILLION CANADIAN GROUP TOURISTS.

Including residents travelling within the region, Western Canada attracts just over one million or 41% of the 2.5 million Canadian adults who have recently taken a holiday in Canada and take organized overnight group tours.

More of Canada's Group Tourists are attracted to destinations in British Columbia (826,000) than to those in Alberta (621,000). These figures include the sizeable number of Group Tourists who have recently been on overnight pleasure trips to *both* provinces (16% or 412,000).

ALBERTA AND BRITISH COLUMBIA GENERATE MANY POTENTIAL TOURISTS FOR ORGANIZED GROUP EXPERIENCES.

Over half of the 1.0 million Group Tourists who have recently travelled within Western Canada are residents of Alberta or British Columbia (562,000). This *intra-regional* Group Tourist market includes more residents of British Columbia (63%) than Albertans (37%). In fact, of *all* domestic Group Tourists in Western Canada, British Columbia is home to one-third (34%), and almost one-quarter are Vancouver residents (23%).

ONTARIO IS A KEY SOURCE OF *INBOUND* GROUP TOURISTS FOR THE REGION.

Western Canada's domestic Group Tourist market includes 473,000 residents of provinces *other than* Alberta and British Columbia (46%). Ontario is the primary *inbound* source of these Group Tourists, contributing over half of the *non-resident* domestic market (55%). Toronto alone is home to twice as many non-resident Group Tourists for Western Canada (30%) as is the entire province of Quebec (16%). Other double-digit *inbound* sources of Group Tourists for Western Canada include Saskatchewan and Manitoba.

GROUP TOURISTS COME IN ALL AGES AND BOTH GENDERS.

While every age group is represented among Western Canada's Group Tourists, these travellers tend to be older than the typical Canadian visitor to the region. Two-fifths are 55 years of age or more, compared to only about one-quarter of *all* overnight pleasure travellers to the region. They are also slightly more likely to be women than men. In fact, women who are 55 years of age or older represent

over one-fifth of the Group Tourist market but constitute only one-seventh of *all* domestic overnight pleasure travellers to Western Canada.

Even though older Canadians are over-represented among the West's Group Tourists, this travel segment includes a sizeable contingent of younger travellers – those who are between 18 and 34 years of age. Canadians least likely to be in the market for organized overnight group tourism experiences are those in the *raising families* stage of the life cycle (35 to 44 years). Consistent with their ages, members of the Group Tourist market tend to live in households with two adults and no children.

GROUP TOURISTS SPAN EDUCATION AND INCOME SPECTRUMS.

About two-fifths of Canadian Group Tourists in Western Canada are university educated – a proportion somewhat higher than the typical Canadian overnight pleasure tourist to the region.

In light of their tendency to be in the 55+ or 65+ age group, it comes as no surprise that fewer of Western Canada's Group Tourists are in the labour force than are domestic overnight pleasure tourists in the region as a whole. Nonetheless, over half of organized group travellers are still actively engaged in the labour market and only about one-quarter describe themselves as *retired*.

Group Tourists in Western Canada's domestic market represent the full range of household incomes. They are almost evenly divided among those claiming incomes under \$60,000, those in the \$60,000 to under \$100,000 bracket, and those in the more affluent \$100,000+ bracket. These tourists are somewhat more likely to fall into the upper income bracket (\$100,000+) than are domestic travellers to Western Canada as a whole.

INBOUND AND INTRA-REGIONAL DOMESTIC GROUP TOURISTS ARE DIFFERENT.

Group Tourists travelling *within* their own region (residents of Alberta or British Columbia) are divided evenly between men and women whereas those who come to Western Canada from other provinces are much more likely to be women (55%). These *inbound* tourists are also more likely to be older and, as a consequence, to be retired than are *intra-regional* Group Tourists. *Inbound* visitors and their parents were born in Canada (60%) at a considerably higher rate than is the case among those who reside in Alberta or British Columbia (42%).

SUN/SEA STATES AND OTHER FOREIGN DESTINATIONS ARE MAJOR COMPETITORS FOR WESTERN CANADA.

Likely as a function of Canadians' interest in warmer destinations during the winter months, sun/sea U.S. states including California, Florida, Nevada and Hawaii are more attractive to Western Canada's Group Tourists than they are to typical Canadian tourists in the region. The lure of sun/sea destinations is not, however, restricted to U.S. states. Foreign destinations such as Mexico and the Caribbean have a disproportionately strong appeal among Western Canada's domestic Group Tourists.

These tourists also favour other foreign destinations. Over one-quarter have recent European pleasure travel experiences – a rate that is twice that of the typical Western Canadian traveller. While at lower levels, Group Tourists take Asia-bound pleasure trips and trips to Central/South America at about three times the rate as do recent domestic visitors to Western Canada as a whole.

SAFETY IS A TOP PRIORITY.

Like other Canadian tourists, Western Canada's Group Tourists put *feeling safe* at the top of conditions important in destination selection. Many also attach a high degree of importance to a destination that poses *no health concerns* and offers *many things for adults to see and do*. *Direct air access* and, to a lesser extent, convenient *access by car* are important considerations in a destination choice for about one-third of the region's group market.

GROUP TOURISTS TO LOCATIONS IN WESTERN CANADA HAVE A WIDE VARIETY OF ACTIVITY-BASED REASONS FOR TRAVEL.

These tourists are not readily pigeonholed. About 6-in-10 have taken overnight trips motivated by **nature or outdoor activities** while more than one-third took trips in order to go to theme parks or other **entertainment activities** including casinos. Almost the same proportion took trips motivated by **culture and learning-oriented activities** such as historic sites, museums, art galleries, or performances. Approximately one-third have also recently taken trips for a **resort or spa experience** and about one-fifth have been motivated by **culinary or wine** interests.

THEY HAVE DIFFERENT INTERESTS THAN TYPICAL CANADIAN TOURISTS.

The region's Group Tourists closely resemble *all* domestic vacationers to Western Canada in terms of activity-based trip drivers, with several noteworthy exceptions. Group Tourists are significantly more likely to be motivated by **cultural and/or learning activities** and somewhat more commonly driven to take trips for **entertainment activities** and **wine/culinary** pursuits than are typical travellers to Western Canada. In contrast, Group Tourists resemble all domestic tourists in Western Canada in terms of trips motivated by **participatory outdoor** activities, **lodging-based** activities, **shopping**, **spectator sporting events** and **team sports**.

THE INTERNET IS THE LEADING SOURCE OF TRAVEL PLANNING INFORMATION.

Of the many sources of travel information available to Canadian tourists to the West, the internet is the most widely used among *all* domestic travellers and to an even greater extent, among those in the Group Tourist segment. Travel agents are also very commonly used by Group Tourists. In fact, the group market uses travel agents at almost twice the rate as do typical visitors to the region.

Reliance on past experience and advice from friends or relatives are also widely used sources of information for Group Tourists as well as for the travelling public as a whole. Official DMO guides, newspapers and maps are more popular among Group Tourists as sources of travel planning information than they are among Western Canada's generic domestic tourists.

A KEY CHALLENGE IS KEEPING GROUP TOURISTS IN CANADA.

Western Canada's Group Tourists travel to the United States at much higher rates than does the typical Canadian visitor to the region. As or more importantly, they also travel to *other countries* at very high rates. Their foreign destination choices suggest that at least to some extent, these group-oriented tourists are seeking relief from the Canadian winter (e.g., Caribbean, Florida, Mexico, California).

They are, however, also seeking cultural experiences that *differ* from their own in destinations such as Europe and Asia. Consequently, destinations and tourism businesses in Alberta and British Columbia wishing to package and promote group and learning tourism may be best advised to identify and highlight the *unique* experiences they have to offer fellow Canadians.

BRITISH COLUMBIA'S IMAGE IS A POWERFUL TOOL IN ATTRACTING GROUP TOURISTS TO WESTERN CANADA.

Canadian travellers as a whole and those in the Group Tourist segment for Western Canada are particularly enthusiastic about British Columbia's appeal, with over 8-in-10 claiming that there are *many* good reasons to visit this province. In turn, about half of these domestic tourists indicate that there are many good reasons to visit Alberta. Given British Columbia's image strength vis à vis Alberta's, marketing and promotional campaigns to attract Canada's group tourists might headline sites and activities within British Columbia.

CONSIDER THE INTERESTS OF FIRST GENERATION CANADIAN GROUP TOURISTS FROM OUTSIDE THE REGION.

Since population growth in Toronto and other major urban markets for Western Canada is being driven by immigration, consideration might be given to the following questions.

- Why is the West less successful in drawing *new Canadian* Group Tourists from long-haul markets than it is among first generation immigrants who live within the region?
- How can the region more successfully promote its organized group tour products in the highly diverse, multi-cultural, multi-lingual immigrant markets in cities such as Toronto and Montréal?

III. Canadian Group Tourist & Learning Tourist Markets

This chapter appears in the *National Perspective* report. It is repeated here to provide context for the reader.

A. An Overview of the Market

1. At the Canada Level

Canadian Overnight Pleasure Travellers: Of the 24.8 million Canadian adults who might have taken overnight trips for pleasure or vacation purposes in the past couple of years, 19.7 million, or almost eighty percent, claim to have done so. Of these, 17.4 million chose Canada for an overnight pleasure trip over a two-year period.

The **Group Tourist** market for *any* destination is estimated to be about three million Canadian **overnight pleasure travellers** (3.0 million). The subset of this market with expressed interest in *learning* travel represents over one million adults (1.3 million). Thus, the **Group Learning Tourist** segment represents over two-fifths of the entire Group Tourist market (44%).

There are many more Canadian **Learning Tourists** than **Group Learning Tourists**. In fact, at 1.3 million, the Group Learning segment represents only one-fifth of the 6.5 million Canadian overnight pleasure travellers in the more broadly defined *All Learning Tourist* segment (29%).

Cruise/Group Tourists: Because there are areas of commonality between overnight cruise and organized group tour experiences, pleasure travellers who participated in either of these activities were combined to get an estimate of total market size. About 1-in-4 overnight pleasure travellers to any destination or 4.7 million Canadians say that they have taken an overnight **cruise** and/or an overnight **group tour** (different locations and/or single location).

Key Definitions

Canadians: For purposes of this report, *Canadian(s)* refers to adults (individuals 18 years of age or over) who reside in Canada's ten provinces, excluding full-time residents of institutions. The territories (Yukon, NWT and Nunavut) and institutional residents were excluded from the TAMS sampling frame by Statistics Canada.

Canadian Destinations: When referred to as a *destination*, **Canada** or **Canadian destinations** includes all provinces and territories.

Overnight Pleasure Travellers: Canadians (see above) who claim to have taken an overnight pleasure/vacation trip in the past two years.

Group Tourists: Canadians (see above) who have taken an organized overnight group tour in the past couple of years (any destination).

Group Tourists in Canada/Regions: Group tourists (see above) who have taken an overnight pleasure trip to Canada or the named province, territory or region in the past couple of years.

Group Learning Tourists: Group Tourists who are also Learning Tourists (see below).

All Learning Tourists: Overnight pleasure travellers who claim that *gaining knowledge of history, other cultures or other places or stimulating the mind/ being intellectually challenged* is a "highly important" benefit of pleasure travel. These tourists may or may not be "Group Tourists".

Western Canada: Alberta and British Columbia.

At 1.8 million, the *cruise only* market – those who claim to have taken a cruise but did not take a group tour – is appreciably smaller than the 3.0 million Canadian adults in the group tour market.⁶

TABLE 1: OVERVIEW OF MARKET SIZE

	Canadian Overnight Pleasure Travellers To . . .					
	Canada's Provincial Adult Population (31,699) 24.8 million		Any Destination (22,919) 19.7 million		Canada (20,576) 17.4 million	
Unweighted base Weighted, Projected						
Overnight pleasure traveller to Canada, past 2 years	17.4 million	70%	17.4 million	88%	17.4 million	100%
Group Tourists	3.0 million	12%	3.0 million	15%	2.5 million	15%
Learning	1.3 million	5%	1.3 million	7%	1.1 million	6%
All Learning Tourists	6.5 million	26%	6.1 million	31%	5.3 million	31%
Group/Cruise Tourists	4.8 million	20%	4.7 million	24%	4.0 million	23%
Cruise Only	1.8 million	7%	1.8 million	9%	1.5 million	9%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volume 1, page 1.

Most of Canada's Group Tourists and Group Learning Tourists have recent travel experience within the country, although they may not have taken a group or group learning vacation to a Canadian destination.⁷

- Of Canada's 19.7 million overnight pleasure travellers, almost 9-in-10 claim to have taken a pleasure trip within the country in the past two years (88%) [See Table 2].
- The proportions of Group Tourists and Group Learning Tourists with recent pleasure trips in Canada are essentially the same. Close to 9-in-10 Group Tourists, Group Learning Tourists and those in the more broadly defined *All Learning Tourist* segment are recent pleasure tourists at Canadian destinations.

TABLE 2: CANADA'S SHARE OF VARIOUS MARKET SEGMENTS

	Any Destination	Canada	Canada's Share
Overnight pleasure travellers	19.7 million	17.4 million	88%
Group Tourists	3.0 million	2.5 million	85%
Group Learning Tourists	1.3 million	1.1 million	86%
All Learning Tourists	6.1 million	5.3 million	87%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volume 1 page 1. This table displays horizontal percentages for each row.

⁶ "Group Tourists" may or may not have taken overnight cruises in the past two years.

⁷ Because almost 9-in-10 TAMS Canada respondents report having taken an overnight pleasure trip *within* Canada in the past two years, this group is the primary analytical unit in this report (recent **domestic** overnight pleasure travellers).

2. At the Regional Level

Canada's regions attract domestic overnight pleasure travellers in varying numbers, in large part reflecting the size of each region's population and the propensity of Canadians to travel to destinations in their "own" province or region. Thus, as many as 8.9 million Canadians have recent overnight pleasure travel experiences in Ontario while less densely populated regions such as Manitoba/Saskatchewan attract about 2.2 million overnight domestic pleasure tourists over a two-year period.

Regardless of the *volume* of Canadians attracted to each province or region, the *Group Tourist share* of each region's overnight pleasure tourism is quite stable across the country and closely approximates the national share (15%).

- In effect, **Group Tourists** are as likely to be found among recent overnight pleasure tourists to Alberta or British Columbia (16%) as they are among Manitoba's or Saskatchewan's recent overnight domestic tourists (15%), or those visiting Atlantic Canada (15%).
- The exceptions to this pattern are Ontario and Quebec. Each of these provinces is slightly more apt to attract domestic Group Tourists (Ontario, 17%; Quebec, 18%) than is any other specific region or the country as a whole (15%).

TABLE 3: MARKET SEGMENTS BY REGION	Canada's Provincial Adult Population Canadian Overnight Pleasure Travellers To Destinations In . . .						
	Total (31,699)	Canada (20,576)	Alberta/ B.C. (8,916)	Man/ Sask (4,133)	Ontario (10,057)	Quebec (6,822)	Atlantic Canada (4,013)
Unweighted base							
Weighted, Projected	24.8 million	17.4 million	6.6 million	2.2 million	8.9 million	6.4 million	3.2 million
Group Tourists	12%	15%	16%	15%	17%	18%	15%
<i>Number in millions</i>	3.0	2.5	1.0	0.3	1.5	1.2	0.5
Learning	5%	6%	7%	5%	8%	8%	8%
<i>Number in millions</i>	1.3	1.1	0.5	0.1	0.7	0.5	0.3
All Learning Tourists	26%	31%	34%	32%	33%	33%	33%
<i>Number in millions</i>	6.5	5.3	2.2	0.7	3.0	2.1	1.1
Group/Cruise Tourists	20%	23%	25%	23%	26%	29%	25%
Cruise Only	7%	9%	9%	8%	9%	10%	9%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 1-3, page 1-3/4.

Group Learning Tourists are also relatively stable across Canada's regions. Nonetheless, Manitoba and Saskatchewan are somewhat less successful in attracting these Canadians (5%) than is any other part of the country [See Table 3].

Again, relative to their share of domestic overnight pleasure travellers in general and those who have recently travelled within Canada, there is minimal regional variation in the ability of each of Canada's regions to attract **Learning Tourists** as a whole. Approximately 1-in-3 recent overnight pleasure travellers to each region fall within this broadly defined *learning travel* market

Table 4 displays the *share* each region represents of domestic overnight pleasure travellers **within Canada** in each of the key market segments.⁸ When viewed from this perspective, the relative success of Ontario and especially Quebec in the Group Tourist market, and particularly in the Group Learning subset is clearly evident. These provinces attract substantively higher shares of Canada's Group Tourists and Group Learning Tourists than their shares of total domestic overnight pleasure visitation within Canada would suggest.

	Proportion of Canadian Overnight Pleasure Travellers In Canada with Destinations in . . .				
	Alberta/ B.C.	Man/ Sask	Ontario	Quebec	Atlantic Canada
Overnight pleasure travellers	38%	13%	51%	37%	18%
Group Tourists	41%	13%	59%	46%	19%
Group Learning Tourists	44%	11%	62%	48%	23%
All Learning Tourists	42%	14%	56%	40%	20%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volume 1 page 45. This table displays horizontal percentages for each row. Note: row percentages add to more than 100% due to duplication of visitors to various regions.

Information about the market size and characteristics of Group Tourists in British Columbia and Alberta is provided in a separate report on Group Tourists in Western Canada. Analogously, more information on these tourists in Manitoba is contained in a stand-alone Manitoba report. These regional reports are provided to the respective partners that commissioned them.

⁸ Rows add to more than one hundred percent because some Canadians travel to more than one province or region.

3. Touring Segments

Three-in-ten Canadian travellers⁹ claim to have taken an overnight *touring* trip over a two-year period. These travellers are somewhat more inclined toward *self-directed* touring (19%) than toward *organized group* tours (15%) but are about as likely to go to a single destination (8%) as they are to include multiple destinations on their overnight tour (10%). Similarly, among the 4-in-10 domestic tourists who have taken *same-day touring excursions* while on overnight trips, there is a preference for self-direction (30%) over a more structured group experience (22%).

By definition, members of the Group Tourist segment have taken organized overnight group tours but their interest in touring extends beyond structured group experiences. Compared to Canadian travellers as a whole, these Group Tourists are appreciably more likely to take *self-directed* overnight touring trips (31%) and same-day *self-directed* (41%) or *organized excursions*¹⁰ (42%). Over half of them elect organized overnight tours with a *single* location (54%) but substantively more go on *multiple location* tours in which they *stayed for one or more nights at different locations* (67%).

Members of the learning subset of Group Tourists display a particularly strong propensity to take *multiple location* overnight tours (78%). They are also somewhat more inclined to take self-directed overnight tours (41%) and either self-directed or organized same-day excursions on overnight trips (65%) than is the Group Tourist segment as a whole.

Two-fifths of All Learning Tourists claim to have taken an overnight organized tour in the past couple of years, with slightly more of these Canadians opting for a *multiple location* tour (16%) than for one with a *single location* (10%). These more generic learning tourists are also more inclined to take a self-directed same-day tour (39%) than one that is organized (29%).

⁹ Recall that the primary analytical unit in this report is recent **domestic** overnight pleasure travellers – those who have had a Canadian overnight pleasure trip destination within Canada over a two-year period.

¹⁰ Same-day excursions on overnight trips.

TABLE 5: GROUP TOURIST SEGMENTS

	Canadian Overnight Pleasure Travellers With Destinations In . . .				
	Canada				
	Any Location (22,919) Weighted, Projected 19.7 million	Any Province/ Territory (20,576) 17.4 million	Group Tourists (3,290) 2.5 million	Group Learning Tourists (1,474) 1.1 million	All Learning Tourists (6,590) 5.3 million
Overnight Touring (NET)	28%	29%	100%	100%	40%
Organized Tour	15%	15%	100%	100%	21%
Multiple Location	10%	10%	67%	78%	16%
Single Location	8%	8%	54%	47%	10%
Self-Directed Touring	18%	19%	31%	41%	27%
Same-Day Touring (NET)	39%	40%	57%	65%	50%
Organized Excursion	22%	22%	42%	49%	29%
Self-Directed Touring	29%	30%	41%	48%	39%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volume 1, page 12.

IV. Group Tourists in Western Canada

A. A Market Overview

Western Canada attracts about 1-in-3 of the 19.7 million Canadian adults who take overnight pleasure trips over a two-year period (34%). These 6.6 million tourists represent almost 2-in-5 Canadian pleasure travellers with a destination *within* Canada over a two-year period (38%). The region is significantly more successful in attracting **Group Tourists** (41%) than it is in drawing the *typical* Canadian pleasure traveller to any destination (34%).

TABLE 6: MARKET SHARE – ALL CANADIAN PLEASURE TRAVELLERS – PAST 2 YEARS

	Canadian Overnight Pleasure Travellers . . .		
	Total		Group Tourists
	To Any Destination	To Canadian Destinations	To Canadian Destinations
Unweighted	(22,919)	(20,576)	(3,290)
Weighted, Projected	19.7 million	17.4 million	2.5 million
Destinations in . . .			
Western Canada	34%	38%	41%
<i>Number</i>	6,619,000	6,619,000	1,035,000
Alberta	20%	23%	24%
<i>Number</i>	3,979,000	3,979,000	621,000
British Columbia	25%	29%	33%
<i>Number</i>	5,023,000	5,023,000	826,000

Source: TAMS Canada Special Tabulations, Research Resolutions, Volume 1, page 45.

Regardless of the travel segment, British Columbia achieves a higher share of Canadian pleasure travellers than does Alberta. Specifically, of Canada's Group Tourists who have recently taken overnight pleasure trip to Canadian destinations, 1-in-4 are recent tourists in Alberta (24%) and 1-in-3 have recently traveled within British Columbia. Note that the *sum* of recent pleasure tourists in the two provinces is larger than all visitors to Western Canada because many Canadians go to *both* Alberta and British Columbia (see the following section for details).

The difference in appeal between the two provinces, particularly within the Group Tourist segment, may be associated with some or all of the following:

- British Columbia has a larger provincial population than does Alberta so *resident travel* could contribute to British Columbia's larger share of tourists¹¹;

¹¹ Adults 18 years of age or over, 2006 estimates used in TAMS micro data file: Alberta adult residents, 2,466,000; British Columbia adult residents, 3,326,000. See Detailed Tables, Volume 1, page 40.

- A substantively higher proportion of Canada' Group Tourists are British Columbia residents (15% or 397,000) than is the case for Alberta (9%, 219,000).
- A stronger behavioural or attitudinal preference on the part of Canadians to visit British Columbia than Alberta.

The shares represented by each group or learning segment of interest to Western Canada in total and each of the two provinces are essentially identical.

- One-seventh of all Canadian overnight pleasure tourists to Western Canada, Alberta and British Columbia are Group Tourists;
- Half this proportion, or seven percent fall within the *learning* segment of the Group Tourist market; and
- Approximately one-third are more generic *learning* tourists (who may or may not have taken overnight organized group tours recently).

	Canadian Overnight Pleasure Travellers to Destinations in . . .		
	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(5,778)	(6,498)
Weighted, Projected	6,619,000	3,979,000	5,023,000
Group Tourists	16%	16%	16%
Learning	7%	7%	8%
All Learning Tourists	34%	33%	35%
Type of Group Tour			
Different Destinations	11%	11%	12%
Single Destination	8%	8%	8%
Group/Cruise Tourists	25%	24%	27%
Cruise Only	9%	9%	10%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, pages 1, 12.

Group Tourists in Western Canada and each province are divided with respect to their preference for *single* versus *multiple destination* group tours. On balance, however, they exhibit a slight preference for spending nights in more than one location during a group or learning travel experience.

When Canadian overnight cruise passengers are added to the organized Group Tourist market, the numbers in Western Canada increase substantively. This larger market for what are essentially "group" experiences on land or on sea represents about one-quarter of all domestic overnight pleasure tourists in Western Canada over a two-year

period (25%). One-tenth of the domestic travel market to the region are recent *cruise passengers* who did not take an organized group tour (Cruise Only).

B. Cross-Visitation in Western Canada

The TAMS study captures overnight pleasure destination information over a two-year period. As such, tourists can have visited many different destinations on the same or different trips. Based on the findings, there is considerable overlap among Group Tourists' destinations in Western Canada but it is impossible to know whether the overlap represents visits to multiple locations on the same trip or separate trips.

British Columbia attracts more of Western Canada's *total* domestic tourist market and more of the region's Group Tourists than does Alberta. In fact, four-fifths of the 1.0 million Canadian Group Tourists with recent pleasure trips in Western Canada claim to have visited British Columbia over a two-year period. Alberta attracted about three-fifths of the region's Group Tourists.

Similar to all domestic pleasure tourists in the region, Western Canada's Group Tourists are more likely to have taken recent vacations in *both* Alberta and British Columbia (40%) than to have gone to only one of the two provinces. Those who only have recent vacation experience in *only* one of the two provinces are about three times as likely to have gone to destinations within British Columbia (17%) as they are to have limited their western experience to Alberta (6%).

In turn, Group Tourists to Western Canada who restrict their domestic destinations to Alberta and/or British Columbia are especially likely to be *residents* of one of these provinces. Of the 341,000 Western Canada Group Tourists who claim not to have taken recent vacations in any other province or territory, 305,000 or almost 9-in-10 are residents of the region.

TABLE 8: CROSS-VISITATION IN WESTERN CANADA | Canadian Overnight Pleasure Travellers to Destinations in Western Canada

	Total	Group Tourists with Overnight Pleasure Trips in . . .		
		Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Recent Overnight Pleasure Trips to . . .				
Alberta	60%	60%	100%	50%
Only Alberta (no trips to B.C.)	9%	6%	9%	N/A
British Columbia	76%	80%	66%	100%
Only British Columbia (no trips to Alberta)	22%	17%	N/A	22%
Alberta AND British Columbia	36%	40%	66%	50%
Western Canada and no other Canadian Destination*	46%	33%	26%	34%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volumes 2, 3, pages 45-3/6. *Western Canada includes Alberta and/or British Columbia.

C. Group Tourist Profiles

1. Demographic Profiles

a) Place of Residence

Western Canada attracts Group Tourists from across the country. Not surprisingly, however, the region is especially popular among *regional* residents – Group Tourists who live in British Columbia or, less commonly Alberta. Because of its substantial population, Ontario also contributes notable numbers of Group Tourists to the region.

- One-third of all Group Tourists who have recently taken overnight pleasure trips to Western Canada are residents of British Columbia (34%) and most particularly, Vancouver (23%).¹²
- A further one-quarter of the region's Group Tourists are Ontario residents, again with a concentration in the province's largest city – Toronto (14%).
- Albertans in the Group Tour segment represent one-fifth of Western Canada's market (20%). Calgary and Edmonton (6% each) do not make especially substantive contributions to the West's group tour market.

Relative to their shares of *all* overnight pleasure tourists with recent destinations in Western Canada, Ontarians and particularly Toronto residents are over-represented. This province generates about 1-in-5 tourists for the two western provinces (19%) but 1-in-4 of the region's domestic Group Tourists (25%).

In contrast, Albertans tend to be under-represented within the Group Tour market for the region. At over one-quarter of *all* tourists to the region (27%), Alberta contributes only one-fifth of domestic Group Tourists (20%). British Columbia residents represent about the same proportion of *all* overnight pleasure tourists in the region (36%) and of the Group Tourist market (34%).

Alberta's Group Tourists

- Equal proportions of Group Tourists with recent destinations in Alberta are residents of Alberta and British Columbia (28%, each) and somewhat fewer of these Alberta-bound tourists live in Ontario (19%).

¹² Table 9 displays regions/provinces and major urban centres. For the complete list of urban centres included in the TAMS Canada micro data file, readers are directed to Appendix B.

British Columbia's Group Tourists

- In contrast, British Columbia's Group Tour market is dominated by its own residents (40%), one-quarter of whom live in Vancouver (27%). This province also attracts 1-in-4 of its Group Tourists from Ontario (25%). Alberta contributes significant numbers of Group Tourists to its next-door neighbour – close to one-fifth of British Columbia's domestic group tour market are Alberta residents (18%).

The Inbound Domestic Group Tour Market

Of the 1,035,000 Group Tourists who have recently travelled within Western Canada, 473,000 or 46% are residents of provinces *other than* Alberta and British Columbia. Ontario is the principal *inbound* source of Group Tourists for Western Canada. This province contributes over half of Western Canada's non-resident domestic Group Tourists (55%). Toronto alone is home to twice as many non-resident Group Tourists for Western Canada (30%) as is the entire province of Quebec (16%). Other double-digit inbound sources of Group Tourists for Western Canada include Saskatchewan (13%) and Manitoba (10%).

Group Tourists with Overnight Pleasure Trips in Western Canada¹³	
Total Group Tourists	1,035,000
Residents of Western Canada	562,000
Non-Residents	473,000
<u>Place of Residence</u>	(100%)
Atlantic Canada	5%
Halifax	2%
Quebec	16%
Montréal	12%
Quebec City	1%
Ontario	55%
Ottawa	6%
Toronto	30%
Manitoba	10%
Winnipeg	6%
Saskatchewan	13%
Regina	3%
Saskatoon	3%

¹³ Source: TAMS Canada Special Tabulations, Research Resolutions, Volume 3, page 40. Note: All cities listed are Census Metropolitan Areas (CMAs).

TABLE 9:
PLACE OF RESIDENCE | **Canadian Overnight Pleasure Travellers to Destinations in Western Canada**

PLACE OF RESIDENCE	Group Tourists with Overnight Pleasure Trips in . . .			
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Atlantic Canada	3%	2%	3%	2%
Halifax	1%	1%	1%	1%
Quebec	5%	8%	6%	8%
Montréal	3%	6%	5%	6%
Quebec City	*	*	1%	*
Ontario	19%	25%	19%	25%
Ottawa	2%	3%	2%	3%
Toronto	9%	14%	10%	14%
Manitoba	4%	5%	6%	3%
Winnipeg	3%	3%	4%	2%
Saskatchewan	6%	6%	9%	4%
Regina	1%	2%	2%	1%
Saskatoon	2%	2%	2%	1%
Alberta	27%	20%	28%	18%
Calgary	9%	6%	8%	5%
Edmonton	9%	6%	10%	6%
British Columbia	36%	34%	28%	40%
Vancouver	18%	23%	17%	27%
Victoria	3%	3%	2%	4%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 40. Note: All cities listed are Census Metropolitan Areas (CMAs). *Less than 0.5%.

b) Personal and Household Characteristics

Age & Gender

While every age group is represented among Western Canada's Group Tourists, these travellers tend to be older than the typical Canadian visitor to the region. Two-fifths of them (40%) are 55 years of age or more, compared to only about one-quarter of *all* overnight pleasure travellers to the region (27%). They are also slightly more likely to be women (52%) than men (48%). In fact, women who are 55 years of age or older represent over one-fifth of the Group Tourist market (23%) but constitute only one-seventh of *all* domestic overnight pleasure travellers to Western Canada (15%).

Even though older Canadians are over-represented among the West's Group Tourists, this travel segment includes a sizeable contingent of younger travellers – those who are between 18 and 34 years of age (31%). The Canadians least likely to be in the market for organized overnight group tourism experiences and have recently travelled to Western Canada are those in the *raising families* stage of the life cycle (35 to 44 years).

	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
	Total	Group Tourists with Overnight Pleasure Trips in ...		
		Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Age				
18 – 34 Years	32%	31%	30%	30%
35 – 44 Years	19%	12%	12%	11%
45 – 54 Years	21%	17%	18%	17%
55 – 64 Years	14%	20%	23%	20%
65+ Years	13%	20%	17%	21%
Gender				
Men	49%	48%	48%	48%
55+ Years	13%	17%	17%	17%
Women	51%	52%	52%	52%
55+ Years	15%	23%	23%	24%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 38.

Place of Birth

Most Canadian overnight pleasure travellers in Western Canada, regardless of their destination or predisposition to take group trips, were born in Canada. Nonetheless, recent immigrants seem more prone to organized group travel experiences than would be anticipated based on their share of travellers to the region. The proportion of first generation immigrants reaches almost 3-in-10 among Group Tourists whereas only

about 2-in-10 typical pleasure travellers to Western Canada are first generation Canadians (those born abroad).

Among Group Tourists in the region, one-half are individuals who, along with both parents, were born in Canada. The remainder is divided almost evenly between those who, along with at least one parent, were born outside Canada (27%) and those who were born in Canada but have at least one immigrant parent (22%). First generation immigrants in the Group Tourist segment are more apt to have recent tourism experience in British Columbia (31%) than in Alberta (22%).

Education, Labour Force Participation, and Income

About two-fifths of Canadian Group Tourists in Western Canada are university educated (39%) – a proportion somewhat higher than the typical Canadian overnight pleasure tourist to the region (33%). University graduates are more common among Group Tourists in British Columbia (41%) than those who have taken overnight pleasure trips to Alberta within the past couple of years (35%).

In light of their tendency to be in the 55+ or 65+ age groups, it comes as no surprise that fewer of Western Canada's Group Tourists are in the labour force (55%) than are domestic overnight pleasure tourists in the region as a whole (64%). These Group Tourists are not, however, all old retirees! Close to half of them are still actively engaged in the labour market and only about one-quarter describe themselves as *retired*.

Group Tourists in Western Canada's domestic market represent the full range of household incomes. They are almost evenly divided among those claiming incomes under \$60,000 (33%), those in the \$60,000 to under \$100,000 bracket (30%), and those in the more affluent \$100,000+ bracket (37%). These tourists are somewhat more likely to fall into the upper income bracket (\$100,000+) than are domestic travellers to Western Canada as a whole (31%).

Differences between Resident and Inbound Group Tourists

Group Tourists travelling *within* their own region (residents of Alberta or British Columbia) are divided evenly between men and women whereas those who come to Western Canada from other provinces are more likely to be women (55%). These *inbound* tourists are also more likely to be older than are *intra-regional* Group Tourists. Over two-fifths of the inbound group-oriented market for Western Canada are at least 55 years of age (44%) compared to about one-third of the corresponding intra-regional market (36%).

Group Tourists with Overnight Pleasure Trips in Western Canada¹⁴

	Residents	Non-Residents
Total	562,000	473,000
Men	51%	45%
Women	49%	55%
Over 55 years of age	36%	44%
Labour force participant	55%	55%
Retirees	23%	31%
University educated	38%	40%
Household income \$100,000+	37%	37%
Respondent & both parents born in Canada	42%	60%

Labour force participation and household income profiles are similar for Group Tourists to the region and to each of Alberta and British Columbia. Additionally, the **resident and non-resident markets** for Western Canada's Group Tourists have similar education and income profiles but differ in their propensity to be retirees and their place of birth.

- As noted above, *inbound* tourists are older than are *intra-regional* Group Tourists and, consequently, are more apt to be retirees (31%) than are Group Tourists who live in Alberta and British Columbia (23%).
- Of particular note is the challenge Western Canada seems to experience in attracting first generation Canadian Group Tourists from outside the region. Of

¹⁴ Source: TAMS Canada Special Tabulations, Research Resolutions, Volume 3, page 34/37.

non-residents, 6-in-10 were born in Canada as were both of their parents, compared to only 4-in-10 Alberta and British Columbia residents with these characteristics. Put another way, Western Canada is more successful in attracting immigrant Group Tourists from *within* the region than it is in drawing this growth market from other parts of Canada.

- Since population growth in Toronto and other major urban markets for Western Canada is being driven by immigration, consideration might be given to the following:
 - Why is the West less successful in drawing new Canadians from long-haul markets than it is among first generation immigrants who live within the region?
 - How can Western Canada promote its Group Tourist opportunities in the highly diverse, multi-cultural, multi-lingual immigrant markets in cities such as Toronto?

**TABLE 11: PLACE OF BIRTH,
EDUCATION, LABOUR FORCE
PARTICIPATION, INCOME**

	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
		Group Tourists with Overnight Pleasure Trips in . . .		
	Total	Western Canada	Alberta	British Columbia
Unweighted base (8,916)		(1,564)	(1,019)	(1,203)
Weighted, Projected 6,619,000		1,035,000	621,000	826,000
Respondent's Place of Birth				
Canada	81%	72%	78%	69%
All other countries	19%	28%	22%	31%
Background				
Respondent & both parents born in Canada	58%	50%	56%	47%
Respondent & at least one parent born <i>outside</i> Canada	19%	27%	21%	29%
Respondent born <i>in</i> Canada & at least one parent born <i>outside</i> Canada	23%	22%	22%	23%
Education				
High school diploma or less	35%	28%	31%	25%
Some post-secondary	12%	14%	11%	15%
Post-secondary diploma or certificate	20%	19%	21%	18%
University degree+	33%	39%	35%	41%
Labour Force Participant¹				
Retired	17%	27%	26%	28%
Household Income³				
Under \$40,000	22%	18%	17%	18%
\$40,000 - \$59,999	17%	15%	16%	15%
\$60,000 - \$99,999	31%	30%	29%	28%
\$100,000+	31%	37%	38%	39%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, pages 34, 35,36, 37. ¹ Labour force participant¹ includes working full time, part time and self-employed. ²Note: 2005 household incomes have been re-percentage on total stating an income.

2. Household Composition

Consistent with their ages, members of Western Canada's Group Tourist market are concentrated among Canadians living with one other adult and no children (*couples, no children, 44%*).¹⁵ Correspondingly, they are under-represented among people living in *families* (households with two adults and children). One-in-seven Group Tourists are in *family* households (14%) whereas about 1-in-4 typical overnight domestic travellers to Alberta and/or British Columbia are (24%).

	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
	Total	Group Tourists with Overnight Pleasure Trips in . . .		
		Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Lives alone	10%	12%	13%	12%
Couples, no children	38%	44%	47%	44%
Two adults & children under 18	24%	14%	16%	14%
Couples with adult children	8%	7%	7%	8%
Single parent families	5%	5%	4%	5%
Other/not stated	15%	18%	15%	18%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 39. ¹Categories have been constructed from variables available for analysis in the Statistics Canada public use micro data file. See Appendix D or detailed tabulations for the categories included in each of the categories listed in this table.

¹⁵ Standard household size and composition variables have been excluded from the Statistics Canada Public Use Micro Data File (PUMF) and are not, therefore, available for analysis. Furthermore, the many categories included in the household composition question used in the mailback questionnaire (J1) were compressed in the PUMF as per Appendix D.

V. Competitive Destinations

A. Worldwide Destinations for Overnight Pleasure Trips

Canadian travellers were asked to identify the destinations of overnight pleasure trips they took over a two-year period. Of the 6.6 million Canadians who have recently travelled within Western Canada, almost half have also taken overnight pleasure trips to destinations within the United States (48%) and more than one-third have been to other countries (37%). By way of contrast, more than 6-in-10 Group Tourists with recent trips to Alberta and/or British Columbia have been to these destinations over the past two years.

Even though Alberta, British Columbia and other Canadian destinations are attracting Group Tourists, they face considerable competition from the U.S., Europe, Mexico, the Caribbean and Asia, followed by South/Central America. In fact, Western Canada's Group Tourists have recent European pleasure travel experiences at twice the rate (28%) as does the typical Western Canadian traveller (14%). These group travellers take Asia-bound pleasure trips (17%) and trips to Central/South America (11%) at about three times the rate as do recent domestic visitors to Western Canada as a whole (6% and 4%, respectively).

The propensity for domestic Group Tourists to travel outside of Canada is equally prominent among those with recent trips to Alberta and to British Columbia.

TABLE 13: COMPETITIVE DESTINATIONS*

Canadian Overnight Pleasure Travellers to Destinations in Western Canada	Group Tourists with Overnight Pleasure Trips in . . .			
	Total	Western Canada	Alberta	British Columbia
	Unweighted base (8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Canada	100%	100%	100%	100%
USA	48%	65%	64%	65%
Other Countries (NET)	37%	61%	59%	62%
Europe	14%	28%	28%	29%
Mexico	14%	20%	21%	21%
Caribbean	11%	18%	18%	19%
Asia	6%	17%	13%	18%
South/Central America	4%	11%	13%	11%
Australia/New Zealand/ Africa	3%	8%	8%	8%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 45. *Locations visited on overnight pleasure trip, past two years.

B. Competitive Canadian Destinations

Competitive Canadian destinations among Western Canada's Group Tourist market are, in large part, reflective of Canadians' propensity to travel within their own province or to their eastern or western neighbours and in part, a function of very different population densities from province to province. Ontario, as Canada's most populous province, is the most commonly named competitive Canadian destination for Group Tourists in Western Canada (45%¹⁶).

To reveal the lure of competitors *as a destination*, resident travellers within their own province have been excluded, thereby neutralizing the impact of population differences and controlling for Canadians' propensity to travel within their own province. In this context, Ontario's prominence as a competitor to Western Canada fades noticeably (23%).¹⁷

Other popular domestic destinations for Western Canada's Group Tourists include Quebec (27%) and Alberta's eastern neighbours – Saskatchewan/Manitoba (26%).¹⁸ Again, when residents of these regions are excluded, their competitive position declines somewhat.

¹⁶ Includes Ontario residents.

¹⁷ Excludes Ontario residents.

¹⁸ Includes residents of the named provinces.

**TABLE 14: CANADIAN
COMPETITIVE DESTINATIONS*****Canadian Overnight Pleasure Travellers to Destinations in Western
Canada**

	Group Tourists with Overnight Pleasure Trips in . . .			
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Atlantic Canada	12%	16%	18%	15%
Newfoundland/Labrador	3%	4%	4%	3%
PEI	5%	8%	9%	8%
New Brunswick	6%	10%	11%	9%
Nova Scotia	8%	12%	14%	11%
Excluding Atlantic Residents	10%	14%	16%	14%
Quebec	17%	27%	26%	28%
Excluding Quebec Residents	13%	20%	20%	21%
Ontario	32%	45%	45%	46%
Excluding Ontario Residents	17%	23%	28%	25%
Man/Sask	24%	26%	37%	25%
Manitoba	13%	14%	20%	13%
Excluding Manitoba Residents	10%	11%	16%	11%
Saskatchewan	20%	22%	32%	21%
Excluding Sask Residents	16%	17%	25%	18%
Territories	3%	5%	7%	5%
Yukon	2%	4%	5%	4%
Northwest Territories	1%	2%	3%	2%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 45, 46. *Locations visited on overnight pleasure trip, past two years. Note: Alberta and British Columbia are not displayed in this table because they are not competitive destinations for Western Canadian Group Tourists.

C. Competitive U.S. Destinations

Sun/sea states within the United States are more attractive to Western Canada's Group Tourists (44%) than they are to typical Canadian tourists in the region (30%), no doubt reflecting the lure of warmer destinations during the winter months.¹⁹ The most popular sun/sea states are California, Florida, Nevada and Hawaii.

No matter what Alberta or British Columbia does in terms of product development or marketing, these provinces are unlikely to compete successfully with U.S. *sun/sea* destinations during the winter months. The appeal of this type of destination is not restricted to the U.S.A. As noted previously, foreign destinations such as Mexico and the Caribbean also have disproportionately strong appeal among Western Canada's domestic Group Tourists.

Other U.S. areas that represent noteworthy competition for Western Canadian destinations within the Group Tourist market include those that are nearby such as Washington and, much further a field, the home of the Big Apple – New York State.

¹⁹ States listed in the summary table are those attracting at least five percent of Western Canada's Group Tourists. Note that states included in "sun/sea" are somewhat different in the Canadian report than in the corresponding U.S. Group Tourists report because in the TAMS public use micro data file, Statistics Canada combined states into *macro* variables that include some of the states identified in the U.S. report as *sun/sea*. For example, New Mexico is included with Alabama, Arkansas, Georgia, Louisiana, Mississippi, Oklahoma and Tennessee as a single variable in the Statistics Canada data file.

TABLE 15: U.S. COMPETITIVE DESTINATIONS***Canadian Overnight Pleasure Travellers to Destinations in Western Canada**

	Group Tourists with Overnight Pleasure Trips in . . .			
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Sun/Sea States (S)	30%	44%	46%	44%
<i>In rank order by Group Tourists</i>				
California (S)	14%	20%	22%	21%
Washington State	13%	15%	16%	17%
New York State	8%	15%	13%	17%
Florida (S)	9%	15%	14%	16%
Nevada (S)	8%	15%	17%	15%
Oregon	5%	9%	10%	10%
Hawaii (S)	5%	9%	8%	9%
Alaska	3%	7%	7%	8%
Arizona (S)	5%	7%	8%	7%
Montana	4%	7%	9%	8%
Idaho	3%	6%	6%	7%
Texas (S)	3%	6%	6%	6%
Massachusetts	3%	6%	4%	7%
Washington D.C. Area ²	3%	5%	5%	5%
North Dakota	3%	5%	7%	4%
Michigan	3%	5%	5%	5%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 48. *U.S. locations visited on overnight pleasure trip, past two years. States listed are those with at least 5% of Western Group Tourists naming them as destinations. See detailed tables for complete list. ² Includes Delaware, Maryland, Virginia, West Virginia, Washington D.C.

D. Destinations: Role & Ratings

1. Importance of Destination

For most of Western Canada's Group Tourists, the first consideration in planning their most recent summer and/or winter trip was **destination**. These tourists also put a premium on destination choice *per se*, with over 3-in-5 claiming that it is *extremely* or *very important* to them.

It is worth noting that even though they have booked *overnight tours* in the past couple of years, Group Tourists are not appreciably different from the typical visitor in Western Canada in terms of starting their trip planning process with a *vacation experience* in mind.

TABLE 16: CONSIDERATIONS/ IMPORTANCE OF DESTINATION	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
		Group Tourists with Overnight Pleasure Trips in . . .		
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
First Consideration for Most Recent Summer/Winter Trip (NET)*				
Start with destination	57%	60%	63%	59%
Start with type of vacation experience	27%	23%	24%	22%
Start with activities	19%	18%	18%	19%
Look for package deal	2%	4%	3%	4%
Importance of Destination				
Extremely/Very Important	62%	63%	65%	62%
Extremely important	23%	26%	26%	26%
Very important	39%	38%	39%	36%
Average**	3.8	3.8	3.8	3.8

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, pages 22, 24. *Based on respondents who reported taking a summer and/or winter overnight pleasure trip in past two years. **Average based on assigned values of 5 for "extremely important" to 1 for "not at all important". Averages are calculated only on those volunteering an opinion. Percentages for "first consideration" do not add to 100% because not all response categories are shown.

2. Importance of Conditions in Destination Choice

Overnight pleasure travellers were asked to rate a variety of “conditions” in terms of their importance in making a destination choice. A three-point semantic scale was used.²⁰

Group Tourists in Western Canada are very similar to recent Canadian overnight pleasure travellers to the region in terms of the conditions they accord *high importance*. Like other domestic western tourists, Group Tourists put *feeling safe* at the top of their list. Having withstood the SARS²¹ epidemic in 2003, reading media accounts of West Nile Virus victims and the ongoing publicity about a potential *bird flu* pandemic, it is not too surprising that half of Western Canada’s tourists, including those in the group segment, attach a high degree of importance to a destination that poses *no health concerns*.

About two-fifths of Group Tourists also want a destination with *many things for adults to see and do*. The priority associated with *adult* activities and the corresponding disinterest in activities for *children* (9%) reflect the fact that many members of the niche organized group market live in adult-only households and, more likely than not, are travelling in adult-only parties.

Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 Western Canada Group Tourists²²

	All Western Canada Pleasure Tourists	Western Canada Group Tourists
Feeling safe	66%	66%
No health concerns	48%	48%
Lots for adults to see/do	39%	41%
Direct access by air	31%	37%

Direct air access and, to a lesser extent, convenient *access by car* are also important considerations in a destination choice for a significant minority of the region’s group market. Direct air access is deemed a highly important consideration by more Group Tourists (37%) than by generic domestic tourists to Alberta and/or British Columbia (31%), possibly reflecting the particularly strong inclination of Group Tourists to travel to destinations outside North America and to Canadian destinations outside their “home province”.

²⁰ “Highly important”, “Somewhat important”, and “Of no importance”.

²¹ Severe Acute Respiratory Syndrome.

²² See Table 17 for full array of considerations deemed “highly important” and “of no importance”.

When assessing lodging opportunities in a destination, Western Canada's Group Tourists are more apt to put their priority on *mid-range* than on *budget lodging*. Few appear to be seeking *luxury accommodation* at one end of the comfort spectrum or a *campsite* at the other end when evaluating potential destinations.

<u>Highly Important Lodging Types</u>	<u>Western Canada Group Tourists</u>		
	<u>Total</u>	<u>Alberta</u>	<u>British Columbia</u>
Mid-range	30%	32%	29%
Budget	22%	21%	22%
Camping	9%	13%	9%
Luxury	7%	6%	7%

Availability of *information on the internet* is considered *highly important* by approximately 1-in-4 Group Tourists (23%). About the same proportion of these group oriented Canadians identify the availability of *low cost packages* as a consideration in destination selection (20%). While not a widespread priority *condition* for destination selection, experiencing a *culture very different from their own* is of somewhat more importance to Western Canada's Group Tourists (14%) than to typical domestic tourists to the region (9%).²³

²³ See Table 17 on the following page for figures for all *conditions*.

TABLE 17: CONDITIONS FOR SELECTING A DESTINATION

	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
		Group Tourists with Overnight Pleasure Trips in . . .		
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
<i>Bold rows are proportion stating "Highly Important"</i>				
No health concerns	48%	48%	48%	47%
Of no importance	8%	8%	7%	8%
Feeling safe	66%	66%	66%	64%
Of no importance	3%	2%	2%	2%
Familiar with culture & language	11%	7%	8%	7%
Of no importance	28%	34%	33%	36%
Very different culture than own	9%	14%	15%	15%
Of no importance	41%	28%	32%	27%
Have friends or relatives there	11%	6%	7%	6%
Of no importance	59%	63%	62%	64%
Low cost packages available	21%	20%	19%	20%
Of no importance	26%	24%	23%	24%
Disabled-person-friendly	5%	3%	4%	3%
Of no importance	78%	78%	78%	80%
Lots for children to see/do	15%	9%	9%	8%
Of no importance	60%	68%	64%	69%
Lots for adults to see/do	39%	41%	38%	41%
Of no importance	6%	4%	3%	4%
Information available on internet	26%	23%	21%	24%
Of no importance	25%	23%	25%	23%
Great shopping	11%	9%	9%	9%
Of no importance	44%	41%	43%	42%
Luxury accommodation	6%	7%	6%	7%
Of no importance	57%	52%	50%	53%
Mid-range accommodation	30%	30%	32%	29%
Of no importance	14%	8%	8%	8%
Budget accommodation	23%	22%	21%	22%
Of no importance	23%	21%	19%	21%
Camping	15%	9%	13%	9%
Of no importance	47%	50%	46%	50%
Convenient access by car	39%	30%	29%	30%
Of no importance	12%	14%	13%	15%
Direct access by air	31%	37%	33%	36%
Of no importance	18%	11%	12%	11%
Convenient access by train/bus	12%	16%	15%	16%
Of no importance	40%	31%	32%	31%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 25. **Bold rows** are proportion stating "Highly Important".

3. Appeal of Various Destinations

Two image questions associated with specific destinations were included in the TAMS study. One of these asked travellers to use a ten-point bi-polar rating scale ranging from *very appealing* (10) to *very unappealing* (1) to assess each destination's appeal for a pleasure trip.²⁴ Sizeable minorities of Western Canada's domestic overnight pleasure tourists refrained from offering opinions about destinations included in this question, presumably because they did not have sufficient information about the destination to form a clear image.²⁵

The top-rated destinations among all Western Canada domestic tourists and Group Tourists are British Columbia, followed at a considerable distance by Hawaii and, at an even more distant level, by Alberta, California, Nova Scotia, and Prince Edward Island (PEI). Not surprisingly, Group Tourists who have been to Alberta accord the province a higher appeal score (8.0) than do Group Tourists to Western Canada as a whole (7.6). In contrast, British Columbia's appeal is equally high among Canadian Group Tourists who visited the province recently and those who travelled in Alberta and/or British Columbia (9.0 each).

Summary: Five Highest Appeal Destinations among Group Tourists in Western Canada²⁶

	<u>Western Canada's Canadian Pleasure Tourists</u>			
	<u>Total</u>	<u>Group Tourists</u>		
		<u>Total</u>	<u>To Alberta</u>	<u>To B.C.</u>
British Columbia	9.0	9.0	8.9	9.0
Hawaii	8.1	8.2	8.0	8.2
Alberta	7.5	7.6	8.0	7.4
California	7.4	7.6	7.4	7.6
Nova Scotia	7.3	7.5	7.7	7.5
Prince Edward Island	7.3	7.5	7.6	7.5

Recall that substantial minorities of Western Canada's Group Tourists are residents of Alberta (20%) or British Columbia (34%). These residents may have different exposure to and appreciation of the respective province's touristic appeal. An examination of

²⁴ The second question associated with reasons to travel to a destination is discussed in the following chapter.

²⁵ Between one-fifth and one-quarter of all Western Canada domestic tourists and those in the organized group segment declined to proffer ratings for Newfoundland and Labrador, each of Canada's territories and Colorado.

²⁶ See Table 18 for full array of average ratings and proportion unable/unwilling to rate each destination.

appeal scores *only* among domestic Group Tourists who are *not residents* of the respective provinces suggests that of the two jurisdictions, British Columbia at 8.8 has significantly stronger appeal (Alberta, 7.8).

TABLE 18: APPEAL OF VARIOUS DESTINATIONS

Canadian Overnight Pleasure Travellers to Destinations in Western Canada

	Group Tourists with Overnight Pleasure Trips in . . .			
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
<i>Bold rows are average ratings</i>				
Newfoundland & Labrador	6.8	7.0	7.2	7.1
No rating provided	19%	18%	20%	17%
Nova Scotia	7.3	7.5	7.7	7.5
No rating provided	14%	11%	11%	10%
New Brunswick	6.5	6.7	6.8	6.7
No rating provided	16%	12%	13%	12%
Prince Edward Island	7.3	7.5	7.6	7.5
No rating provided	15%	13%	14%	12%
Quebec	6.5	7.0	6.7	7.2
No rating provided	11%	8%	9%	7%
Ontario	6.7	7.2	7.0	7.3
No rating provided	8%	5%	4%	5%
Manitoba	4.9	5.1	5.1	5.1
No rating provided	14%	14%	12%	13%
Saskatchewan	4.9	5.0	5.1	5.0
No rating provided	13%	13%	11%	13%
Alberta	7.5	7.6	8.0	7.4
No rating provided	5%	5%	2%	5%
British Columbia	9.0	9.0	8.9	9.0
No rating provided	3%	3%	3%	1%
Yukon	6.4	6.4	6.5	6.6
No rating provided	19%	19%	20%	18%
Northwest Territories	5.8	5.8	5.9	6.0
No rating provided	21%	22%	22%	21%
Nunavut	5.0	5.1	5.0	5.2
No rating provided	24%	25%	27%	24%
New York State	6.2	6.9	6.6	7.0
No rating provided	14%	11%	12%	10%
Colorado	6.1	6.3	6.3	6.3
No rating provided	20%	21%	21%	20%
Florida	6.6	6.8	6.7	6.8
No rating provided	13%	10%	12%	10%
California	7.4	7.6	7.4	7.6
No rating provided	11%	10%	11%	9%
Hawaii	8.1	8.2	8.0	8.2
No rating provided	13%	11%	12%	10%
Arizona	6.6	6.7	6.7	6.6
No rating provided	16%	14%	15%	13%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 26. **Bold rows** are average ratings calculated using a ten-point bi-polar rating scale ranging from very appealing (10) to very unappealing (1). Averages are calculated on those volunteering a rating only.

4. Number of Good Reasons to Visit Various Destinations

Consumers were asked to indicate which of three statements best described their feelings about taking a pleasure trip to the same destinations for which they rated *appeal* (see previous section). The statements were *there are NO good reasons to travel to this destination*, *SOME good reasons . . .* and *MANY good reasons to travel to this destination*.

For the most part, the *same* destinations accorded high *appeal* ratings are also the ones that emerge at the top of Western Canada's Group Tourists' lists for having *many good reasons* to visit on a pleasure trip. Specifically, British Columbia tops the list with four-fifths stating that there are many good reasons to go to this western destination. About three-fifths of Group Tourists nominate Hawaii and approximately half name California and/or Alberta as destinations with *many* good reasons for a visit.

Recent pleasure travel within Alberta has a substantive impact on consumers' appraisals of the province. Almost 2-in-3 of the Group Tourists who have been to Alberta recently say there are *many* good reasons to visit this destination, compared to about 1-in-2 Group Tourists to the West as a whole.

Summary: Destinations With At Least One-Half Saying *Many Good Reasons to Visit* (in rank order within each category)²⁷

Western Canada's Group Tourists

<u>In Total</u>	<u>To Alberta</u>	<u>To British Columbia</u>
British Columbia	British Columbia	British Columbia
Hawaii	Alberta	Hawaii
California	Hawaii	California
Alberta	California	

²⁷ See Table 19 for the full array of ratings.

TABLE 19: MANY REASONS TO VISIT	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
	Group Tourists with Overnight Pleasure Trips in . . .			
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Newfoundland & Labrador	31%	33%	37%	33%
Nova Scotia	35%	37%	42%	36%
New Brunswick	22%	23%	28%	23%
Prince Edward Island	35%	36%	40%	36%
Quebec	34%	41%	36%	43%
Ontario	36%	45%	41%	45%
Manitoba	9%	8%	10%	8%
Saskatchewan	12%	11%	14%	10%
Alberta	51%	52%	64%	48%
British Columbia	83%	81%	80%	83%
Yukon	22%	22%	25%	22%
Northwest Territories	16%	16%	18%	16%
Nunavut	11%	10%	11%	11%
New York State	30%	39%	36%	40%
Colorado	18%	18%	20%	18%
Florida	36%	36%	34%	37%
California	49%	53%	50%	55%
Hawaii	56%	60%	57%	60%
Arizona	23%	24%	28%	23%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 27. Proportions are those stating MANY good reasons to visit.

VI. Activities That Motivate Overnight Trips

A. Introduction

The 2006 TAMS questionnaire included approximately 190 activities a person may have engaged in while on a trip. In addition to capturing *incidence* of participation in this array of activities, the study asks consumers to indicate whether an activity they engaged in on *any* overnight trip in the past two years was a *main reason for taking any of these trips*.²⁸

Not Necessarily in Western Canada

TAMS 2006 provides two important but independent measures - where tourists went and what tourists did. Even though the tourists singled out for special scrutiny in this report claim to have taken an overnight pleasure trip to an Alberta or British Columbia destination in the past two years, the activities that motivated their recent overnight trips (any purpose) are **not** linked to their Canadian destination(s). Thus, a trip prompted by interest in going to a casino could have been to Gatineau, Orillia, Montréal, Las Vegas or Monte Carlo. Similarly, the park for a camping experience could have been Waterton Lakes, Riding Mountain, Banff, Death Valley, Grand Canyon, or any other park in the world; a winery could have been in the Okanagan Valley, Napa, Niagara or Bordeaux.

New Categories for Analysis

The survey form presents activities in sections with general headings. New aggregates have been developed for this analysis. These new groups represent an attempt to create meaningful units of information for product development and marketing purposes. For example, a "Cultural/Learning Activities & Events" category has been created that includes activities such as *international film festivals* and *literary festivals or events*. It was felt that these activities were more closely aligned with *live theatre*, and *classical concerts* than with carnivals and comedy festivals. These latter festivals are included in a fairs/festivals sub-group nested within the broader "Theme/Amusement Parks/ Other Entertainment/Events" group.

²⁸ Presumably, "these trips" are those on which the specific activity took place.

The major categories used in this report are listed below.²⁹ A list of intermediate and sub-group activities within each category is appended.

- Participatory Outdoor Activities
- Cultural/Learning Activities & Events
- Theme/Amusement Parks/Other Entertainment/ Events
- Food & Wine
- Cultural/Learning Activities & Events
- Lodging
- Shopping
- Spectator Sports
- Team Sports, Tournaments, Games

Focus on “Main Activity”

For packaging and promotional purposes, tourism planners and marketers need to be able to identify *activity themes* that motivate an overnight pleasure traveller to select one type of group tour or learning travel experience over another. For this reason, the information presented here identifies the relative popularity of activities or activity groups as *trip motivators*. In other words, only information on activities that were the “main reason” a trip was taken is presented here. Information about “any” participation in the full range of activities covered in the TAMS questionnaire is included in the detailed tabulations (under separate cover).

²⁹ Note: all activities in the TAMS questionnaire that were retained in the public use micro data file by Statistics Canada are included in the detailed tabulations but are not necessarily referred to in this report.

B. Activity-Based Trip Motivators

1. Major Category Motivators

Western Canada's Group Tourists, like *all* tourists, have varied interests. They are not readily pigeon-holed into a single type of trip or a single set of activities. There is, in fact, considerable overlap or duplication in their activity-based trip motivations.

- About six-in-ten have taken overnight trips motivated by **nature or outdoor activities**;
- More than one-third took trips in order to go to theme parks or other **entertainment activities** including casinos;
- A similar proportion took trips motivated by **culture and learning-oriented activities** such as museums, art galleries, or performances, hands-on learning experiences and Aboriginal culture;
- About one-third of Western Canada's Group Tourists have also recently taken trips for a wilderness lodge, resort, or spa experience (**Lodging**);
- About one-fifth have been motivated by their **culinary or wine** interests;
- One-seventh of these Canadian tourists have been motivated to take an overnight trip in order to attend a **sporting event**.
- **Shopping**, while a very popular trip activity, does not tend to be a trip driver for Group Tourists.

At this high level of activity aggregation, the region's Group Tourists closely resemble *all* domestic vacationers to Western Canada, although there are several exceptions.

- Group Tourists are significantly more likely than typical domestic overnight pleasure travellers to be motivated by **cultural and/or learning activities**.
- They are also somewhat more commonly driven to take trips for **entertainment activities** and **wine/culinary** pursuits than are typical travellers to Western Canada.

- In contrast, Group Tourists resemble all domestic tourists in Western Canada in terms of trips motivated by **participatory outdoor** activities, **lodging-based** activities, **shopping**, **spectator sporting events** and **team sports**.

**TABLE 20: ACTIVITY MOTIVATORS
– MAJOR CATEGORY OVERVIEW** | Canadian Overnight Pleasure Travellers to Destinations in Western Canada

	Group Tourists with Overnight Pleasure Trips in . . .			
	Total	Western Canada	Alberta	British Columbia
Unweighted base (8,916)		(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Participatory Outdoor Activities	57%	60%	62%	61%
Cultural/Learning Activities & Events	26%	36%	36%	38%
Theme/Amusement Parks/Other Entertainment/Events	32%	37%	40%	37%
Food & Wine	12%	19%	19%	19%
Lodging	32%	34%	34%	34%
Shopping	9%	13%	12%	12%
Spectator Sports	15%	15%	17%	14%
Team Sports, Tournaments, Games	10%	10%	11%	9%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, pages 7, 8, 9, 10, 11.

2. Intermediate Category Motivators

a) Participatory Outdoor Activities

Three-fifths of Western Canada's Group Tourists (60%) include at least one participatory *outdoor activity* among the *main reasons* they took an overnight pleasure trip over the previous two years. At this level, outdoor activities constitute the single largest driver for this market segment. These activities are about as popular among all domestic pleasure travellers to the region (57%) as they are within the group travel segment.

By and large, specific participatory outdoor activities that motivate trips among at least one-tenth of Group Tourists are similar to those of all domestic overnight pleasure tourists with recent trips within Western Canada. Popular **water-based** outdoor trip drivers involve *soft* interactions with the outdoors – **sunbathing, swimming in oceans or lakes and fishing**. Beach activities, including swimming in oceans and sunbathing, are slightly more common among Group Tourists than within the general travelling public to Western Canada, consistent with the group market's propensity to take vacations to U.S. and international *sun/sea* destinations (see Chapter V for destination information).

The most popular **land-based** outdoor trip drivers are also relatively *passive*. **Camping**, particularly in a public campground of a national or provincial park and going to these types of **nature parks** (national/provincial/ state) motivates overnight trips for one-fifth to one-sixth of the region's Group Tourists. **Hiking, golf and flora or fauna viewing** prompt trips for approximately 1-in-10 Group Tourists. Among observers of plants and animals, *land animal viewing* (7%) and *whale watching* (6%) are most commonly named as the *reason* for taking a holiday.

In light of Western Canada's superb skiing infrastructure, it is not surprising that a significant minority of the region's Group Tourists take trips to go **alpine skiing** (18%). A slightly higher proportion of these group-oriented travellers are motivated to take holidays in order to ski than is the case among all domestic tourists to the region (14%).

Note to Readers

All intermediate activity categories that are *main reasons* for a trip **by at least 1-in-10** Western Canada Group Tourists are displayed in summary tables in the Intermediate Category Motivator sections of this report.

For the full list of individual activities as main reasons and all activities engaged in on a recent overnight trip (*any participation*), see detailed tabulations (under separate cover).

**TABLE 21: ACTIVITY MOTIVATORS
– MAJOR & INTERMEDIATE
CATEGORY OVERVIEW**

Canadian Overnight Pleasure Travellers to Destinations in Western Canada	Group Tourists with Overnight Pleasure Trips in . . .			
	Total	Western Canada	Alberta	British Columbia
Unweighted base (8,916)		(1,564)	(1,019)	(1,203)
Weighted, Projected 6,619,000		1,035,000	621,000	826,000
Participatory Outdoor Activities	57%	60%	62%	61%
Outdoor Water Based Activities	41%	45%	47%	46%
Fishing	10%	11%	12%	12%
Boating (<i>motor/sail boat</i>)	6%	7%	9%	8%
Sunbathing at beach	17%	20%	22%	19%
Swimming in oceans	6%	10%	10%	11%
Swimming in lakes	10%	9%	9%	9%
Outdoor Winter Activities	20%	23%	26%	24%
Alpine skiing	14%	18%	20%	19%
Outdoor Land Based Activities	41%	44%	47%	45%
Golf	7%	9%	10%	9%
Hiking	10%	13%	13%	14%
Flora/Fauna Viewing	6%	10%	10%	10%
Nature park	13%	16%	17%	17%
Camping*	19%	19%	19%	18%
Cultural/Learning Activities & Events	26%	36%	36%	38%
Theme/Amusement Parks/Other	32%	37%	40%	37%
Entertainment/Events				
Food & Wine	12%	19%	19%	19%
Lodging	32%	34%	34%	34%
Shopping	9%	13%	12%	12%
Spectator Sports	15%	15%	17%	14%
Team Sports, Tournaments, Games	10%	10%	11%	9%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, pages 7, 8, 9, 10, 11. *Camping is also included in the Net outdoor land-based activity group and the lodging activity group.

b) Cultural/Learning Activities & Events

Group Tourists are more likely to take trips in order to experience a wide variety of cultural or learning activities (36%) than are Canadians who have recently taken an overnight pleasure trip within Western Canada (26%). Performing arts, and most notably live theatre performances; historic sites, buildings and architecture; and museums are particularly apt to motivate trips among these group-oriented visitors to Western Canada. Their propensity to take trips driven by these cultural/learning activities is higher than is the case among the region's general tourist population.

TABLE 22: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW

	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
	Total (8,916)	Group Tourists with Overnight Pleasure Trips in . . .		
		Western Canada (1,564)	Alberta (1,019)	British Columbia (1,203)
Unweighted base	6,619,000	1,035,000	621,000	826,000
Weighted, Projected				
Participatory Outdoor Activities	53%	55%	62%	61%
Cultural/Learning Activities & Events	26%	36%	36%	38%
Performing Arts	8%	12%	11%	13%
Live theatre	5%	8%	7%	9%
Exhibits, Architecture, Historic Sites/Buildings & Museums	14%	22%	22%	23%
Art galleries	4%	7%	6%	8%
Historic sites, buildings	10%	19%	19%	20%
Museums	6%	10%	11%	10%
Strolling Around a City to Observe Architecture	8%	14%	13%	15%
Theme/Amusement Parks/Other Entertainment/Events	32%	37%	40%	37%
Food & Wine	12%	19%	19%	19%
Lodging	32%	34%	34%	34%
Shopping	9%	13%	12%	12%
Spectator Sports	15%	15%	17%	14%
Team Sports, Tournaments, Games	10%	10%	11%	9%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, pages 7, 8, 9, 10, 11.

c) Entertainment Activities & Events

Consistent with the tendency of more Group Tourists to identify outdoor and cultural activities as main reasons for travel than is the case among members of the general travelling public, more members of the group market segment identify **entertainment activities and events** among their recent pleasure trip drivers. Almost two-fifths of Western Canada's Group Tourists (37%) name at least one entertainment activity as a recent trip motivator, compared to about one-third of the region's travelling public as a whole (32%).

Approximately one-fifth of the West's domestic Group Tourists have taken overnight pleasure trips in order to attend **fairs or festivals**; about one-sixth have travelled in order to visit **theme or amusement parks**; approximately one-tenth name **gardens, zoos and/or aquariums** as recent trip drivers and the same proportion say they have taken an overnight pleasure trip in the past two years in order to go to a **casino**.

- Within the group-oriented travel segment, *zoos, aquariums* and *botanical gardens* are equally common trip motivators, with each named by about 1-in-20.
- Popular *fairs and festivals* include **farmers' markets or country fairs, religious festivals, exhibitions or fairs** and **fireworks displays**. Each of these forms of entertainment is identified as a trip driver by 1-in-20 Western Canada Group Tourists.
- **Other entertainment** activities/events that also drive trips for at least 1-in-20 Group Tourists to Alberta and/or British Columbia include **rock 'n roll or popular music concerts** and **dinner-theatre** productions.

**TABLE 23: ACTIVITY MOTIVATORS –
MAJOR & INTERMEDIATE CATEGORY
OVERVIEW**

	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
	Group Tourists with Overnight Pleasure Trips in . . .			
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Participatory Outdoor Activities	53%	55%	62%	61%
Cultural/Learning Activities & Events	26%	36%	36%	38%
Theme/Amusement Parks/Other Entertainment/Events	32%	37%	40%	37%
Fairs/Festivals	12%	19%	22%	19%
Casinos	5%	9%	9%	9%
Theme/Amusement Parks/Movies	12%	15%	15%	15%
Gardens/Aquariums/Zoos/Planetariums	7%	9%	11%	9%
Other Entertainment	16%	18%	20%	18%
Food & Wine	12%	19%	19%	19%
Lodging	32%	34%	34%	34%
Shopping	9%	13%	12%	12%
Spectator Sports	15%	15%	17%	14%
Team Sports, Tournaments, Games	10%	10%	11%	9%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, pages 7, 8, 9, 10, 11.

d) Food & Wine Activities

About one-fifth of Western Canada's Group Tourists take overnight trips in order to enjoy food and/or wine. They are most likely to travel in order to experience **local cuisines**. Comparatively few also take trips to visit **wineries on day trips** (8%) and/or to engage in other food or beverage-related activities. These tourists are more apt to have taken such trips in the past couple of years than are typical Canadian overnight pleasure travellers to Western Canada.

TABLE 24: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW

	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
		Group Tourists with Overnight Pleasure Trips in . . .		
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Participatory Outdoor Activities	53%	55%	62%	61%
Cultural/Learning Activities & Events	26%	36%	36%	38%
Theme/Amusement Parks/Other Entertainment/Events	32%	37%	40%	37%
Food & Wine	12%	19%	19%	19%
Dining	7%	11%	12%	11%
Restaurants with local cuisines	4%	7%	7%	7%
Local outdoor cafes	2%	6%	5%	5%
Other Food	5%	9%	8%	10%
Wineries for day visits/ tastings	3%	8%	7%	9%
Lodging	32%	34%	34%	34%
Shopping	9%	13%	12%	12%
Spectator Sports	15%	15%	17%	14%
Team Sports, Tournaments, Games	10%	10%	11%	9%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, pages 7, 8, 9, 10, 11.

e) Lodging Activities & Shopping

Group Tourists with recent holidays in Western Canada closely resemble all Canadian overnight pleasure travellers to the region in their propensity to take trips prompted by stays in various forms of lodging. About 1-in-3 of these have been motivated to take an overnight pleasure trip in the past couple of years by a resort, camping, spa, farm or guest ranch experience.

The most popular resorts among the West's Group Tourists include those on a **lake or riverside** or **by the sea**, consistent with these Canadians' interest in beach holidays. They also take holidays in order to go to a **ski or mountain** resort, consistent with their interest in alpine skiing. As noted previously, **camping** is also a relatively common trip driver among Group Tourists (19%) (see *outdoor land-based* activity motivators). Staying at a **health spa** as a reason for taking a trip is slightly more common among Group Tourists (5%) than among Western Canada domestic tourists in total (3%), but remains a comparatively small niche market.³⁰

Not widely popular as a trip driver, **shopping** is, however, more commonly named as a motivator by Canadians in the region's Group Tourist market (13%) than it is among all domestic overnight pleasure travellers in Western Canada (9%). Shopping for clothing, shoes and jewellery is slightly more popular as a trip driver than is shopping for local arts and crafts or books/music among members of the group-oriented segment.

³⁰ Even though they do not meet the 10% threshold for display in the summary tables, health spas are shown here because of the growing importance of this niche market to some regional partners.

TABLE 25: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW

	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
	Group Tourists with Overnight Pleasure Trips in . . .			
	Total	Western Canada	Alberta	British Columbia
Unweighted base Weighted, Projected	(8,916) 6,619,000	(1,564) 1,035,000	(1,019) 621,000	(1,203) 826,000
Participatory Outdoor Activities	53%	55%	62%	61%
Cultural/Learning Activities & Events	26%	36%	36%	38%
Theme/Amusement Parks/Other Entertainment/Events	32%	37%	40%	37%
Food & Wine	12%	19%	19%	19%
Lodging	32%	34%	34%	34%
Resort/Spa	19%	22%	22%	22%
Lake/Riverside Resort	8%	11%	12%	10%
Ski Resort	9%	9%	10%	10%
Seaside Resort	8%	12%	13%	12%
Health Spas*	3%	5%	5%	4%
Other Lodging	21%	20%	21%	20%
Camping**	19%	19%	19%	18%
Shopping	9%	13%	12%	12%
Clothing, shoes, jewellery	6%	9%	9%	8%
Local arts and crafts	3%	6%	4%	6%
Books/music stores	3%	5%	5%	5%
Spectator Sports	15%	15%	17%	14%
Team Sports, Tournaments, Games	10%	10%	11%	9%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, pages 7, 8, 9, 10, 11. *Even though they do not meet the 10% threshold for display in the summary tables, health spas are shown here because of the growing importance of this niche market to some regional partners. **Camping is also included in the Net outdoor land-based activity group.

VII. Trip Planning

A. Who Does the Planning?

By and large, responsibilities for trip planning among the group market segment for Western Canada are the same as those of *all* Canadian overnight pleasure travellers who have recently travelled in Alberta and/or British Columbia. Specifically, 8-in-10 consumers who completed the survey claim to have had *personal involvement* in trip planning for **all** or **most** trips planned over the past two years.

In most households, the main responsibility for travel planning falls to the individual who completed the survey or is shared with other household members.

	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
		Group Tourists with Overnight Pleasure Trips in . . .		
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Frequency of personal involvement in trip planning, past 2 years				
All	67%	59%	60%	58%
Most	17%	22%	22%	23%
Some	10%	14%	12%	14%
None/not stated	7%	5%	5%	5%
Main responsibility for trip planning				
Respondent	38%	42%	40%	41%
Shared with other household member	29%	26%	29%	26%
Spouse/partner	15%	15%	15%	16%
Other/not stated	13%	12%	11%	13%
Not involved in travel planning	5%	4%	5%	4%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, pages 16, 17.

B. Travel Information Sources & Travel Media

Of the many sources of travel information available to Canadian tourists to the West, the **internet** is the most widely used among *all* domestic travellers in Western Canada (66%) and to an even greater extent, among those in the Group Tourist segment (72%). **Travel agents** are commonly used by Group Tourists too. In fact, the group market uses them at almost twice the rate (60%) as do typical visitors to the region (34%). **Past experience** and **advice from friends or relatives** are also widely used sources of information for Group Tourists and for the travelling public as a whole.

Travel information sources capturing the attention of at least one-third of Western Canada's group-oriented domestic tourists are listed in rank order below (high to low). **Official DMO guides** (37%), **newspapers** (35%) and **maps** (42%) are more popular among Group Tourists as sources of travel planning information than they are among Western Canada's generic domestic tourists (see Table 27 for figures).

While not among the most common sources of information, **auto clubs** are used to obtain travel information by about 3-in-10 Group Tourists (29%), making them more popular within the group market than among Western Canada's tourists as a whole (20%).

Sources of travel planning information used³¹ by at least one-third of Group Tourists to . . .

<u>Western Canada</u>	<u>Alberta</u>	<u>British Columbia</u>
Internet website	Internet website	Internet website
Travel agent	Travel agent	Travel agent
Advice of friends/relatives	Advice of friends/relatives	Advice of friends/relatives
Past experience	Past experience	Past experience
Maps	Maps	Maps
Official DMO travel guides	Official DMO travel guides	Official DMO travel guides
Newspaper articles/ads	Newspaper articles/ads	Newspaper articles/ads

³¹ For full array of responses, see Table 27.

With over 6-in-10 Group Tourists relying on the internet for travel planning and the same proportion saying that they *normally* visit **travel websites**, the internet has the greatest reach for destinations or travel services. Other travel media sources of note include the following:

- Over two-fifths of Group Tourists claim to watch **televised travel shows** normally (44%);
- Slightly fewer say they frequently read the **travel section** in their local newspaper's weekend edition (39%) and fewer still say they frequently read this section in the weekday newspaper (34%);
- One-fifth of Group Tourists claim to read **travel magazines** such as *Condé Nast* in a typical month.

These levels of engagement with televised and print travel media are appreciably higher than those evident for typical Canadian pleasure travellers to Western Canada.³²

³² More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover. See Tables 36 – 41.

**TABLE 27: INFORMATION SOURCES
FOR TRAVEL PLANNING & GENERAL
MEDIA HABITS**

	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
		Group Tourists with Overnight Pleasure Trips in . . .		
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected <i>In rank order by Group Tourists</i>	6,619,000	1,035,000	621,000	826,000
<u>SOURCES OF TRAVEL PLANNING INFO</u>				
Internet website	66%	72%	72%	73%
Travel agent	34%	60%	59%	62%
Advice of friends/relatives	53%	59%	59%	61%
Past experience	53%	53%	53%	55%
Maps	39%	42%	42%	44%
Official DMO travel guides	27%	37%	37%	38%
Any newspaper	25%	35%	34%	36%
Articles	20%	29%	27%	31%
Advertisements	13%	23%	21%	24%
Auto club	20%	29%	30%	28%
Travel guide books	17%	29%	27%	31%
Visitor information centres	25%	27%	28%	29%
Any television	11%	17%	17%	17%
Programs	9%	15%	15%	16%
Advertisements	4%	8%	8%	8%
Travel information in mail	8%	15%	14%	16%
Electronic newsletters via e-mail	5%	8%	9%	8%
Trade, travel, sportsmen's shows	4%	5%	6%	5%
<u>TRAVEL MEDIA</u>				
Frequently read newspaper travel section				
In weekday editions	20%	34%	31%	34%
In weekend editions	24%	39%	35%	40%
Read travel magazines in typical month	11%	21%	20%	23%
Normally watch travel shows on TV	31%	44%	46%	44%
Normally visit travel websites	46%	59%	57%	61%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, pages 18, 28, 29, 30, 32. More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover. See Tables 36 – 41.

C. Internet Use for Travel Inquiries & Bookings

Whether they take organized group trips or not, most Canadian overnight pleasure travellers to Western Canada destinations rely on the internet for travel planning (66%). As noted in the previous section, use of the web is even higher among Group Tourists (72%).

Two-thirds of the Group Tourists in Western Canada who use the internet for travel planning visit airline and/or hotel sites, followed by travel planning sites such as *Expedia*. About half of them explore destination marketing organization sites and about one-third click on attraction sites. For the most part, these website choices are the same as those of all domestic tourists with recent trips in Western Canada. Cruise sites, however, are twice as popular among Group Tourists (20%) as they are among typical Canadian overnight pleasure travellers in the West (9%).

Purchase of travel-related goods and services on-line is characteristic of about half of *all* Canadian pleasure travellers to Western destinations (46%) and to the Group Tourist segment of this market (49%). As their website preferences would suggest, the most common travel purchases on-line among those who buy goods and services directly from websites are airline tickets and lodging, followed at a considerable distance by car rentals, tickets for attractions and activities, other transportation tickets and package deals.

TABLE 28: WEBSITE USAGE FOR TRAVEL PLANNING | **Canadian Overnight Pleasure Travellers to Destinations in Western Canada**

	Group Tourists with Overnight Pleasure Trips in . . .			
	Total	Western Canada	Alberta	British Columbia
Unweighted base (8,916)		(1,564)	(1,019)	(1,203)
Weighted, Projected 6,619,000		1,035,000	621,000	826,000
Used Internet website for travel planning, past 2 years	66%	72%	72%	73%
	(100%)	(100%)	(100%)	(100%)
<u>Internet website(s) used</u> (%s based on "Users")				
Airline	58%	66%	66%	64%
Hotel/resort	60%	65%	63%	65%
Travel planning/booking	50%	58%	62%	56%
Destination marketing organization	51%	52%	51%	54%
Attraction	35%	35%	33%	35%
Cruise	9%	20%	19%	21%
Motorcoach	3%	5%	4%	5%
Other	27%	31%	38%	33%
Any Internet Purchases in Past 2 Years (Among All Overnight Pleasure Travellers)	46%	49%	51%	50%
	(100%)	(100%)	(100%)	(100%)
<u>Items Purchased On-Line</u> (%s based on "Purchasers")				
Air tickets	81%	83%	86%	82%
Accommodation	69%	76%	75%	78%
Car rental	34%	38%	38%	36%
Tickets for activities/attractions	26%	29%	27%	30%
Rail, bus, boat tickets	17%	25%	24%	27%
Package deal (2+ items)	16%	22%	22%	23%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, pages 19, 20.

VIII. Other Travel-Related Information

A. Use of Package Deals

Since most “group tours” are sold as *packages*, it is not surprising that purchase of package deals over a two-year period is about twice as common among Western Canada’s Group Tourists as it is among the average domestic overnight pleasure traveller to the region. Over three-fifths of Group Tourists claim that at least one of the trips they took recently was a “package deal”.

Most Group Tourist buyers want a package to include accommodation and transportation to the destination, followed by transportation at the destination, food and beverages and tickets for activities and attractions.

TABLE 29: PACKAGE DEALS	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
		Group Tourists with Overnight Pleasure Trips in . . .		
	Total	Western Canada	Alberta	British Columbia
Unweighted base (8,916)		(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Frequency of Purchasing Packages in Past 2 Years				
Most/all trips	5%	13%	11%	14%
One/some trips	26%	51%	52%	51%
No trips/not stated/not sure	69%	36%	37%	35%
Desired Components of Packages (%s based on “Purchasers of Packages”)	(100%)	(100%)	(100%)	(100%)
Accommodation	93%	93%	92%	93%
Transport to destination	90%	91%	90%	91%
Transport at destination	54%	66%	64%	65%
Food and beverage	62%	62%	64%	60%
Tickets for activities/attractions	47%	54%	52%	54%
Other	13%	13%	14%	14%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 21.

B. Benefits Sought From Pleasure Travel

Canadian travellers were asked to indicate the importance they attach to a variety of possible *benefits* from pleasure travel using a three-point semantic scale ranging from *of no importance* to *highly important*. The figures presented in this section are the proportion of Western Canada's tourists who claim a benefit is *highly important*.

The priorities of Group Tourists as a whole closely resemble those of *all* domestic tourists in Western Canada. Specifically, they focus on the **relaxation** benefits of tourism, gaining **new and different experiences**, enriching their **relationships with family members** and creating lasting **memories**.

Compared to typical tourists in the region, more Group Tourists are interested in **novelty** (seeing and/or doing something new and different) when travelling (All, 49%; Group Tourists 61%). They are also more likely to seek **knowledge of history, other cultures or other places**, to **enrich their perspectives** on life, and, to a lesser extent, to find **intellectual challenges** than are domestic vacationers to Western Canada as a whole.

5 Top Highly Important Benefits in Rank Order³³ Overnight Pleasure Tourists To Western Canada

<u>All</u>	<u>Group</u>	<u>Group - Alberta</u>	<u>Group - B.C.</u>
Break from day-to-day	Relax/relieve stress	Relax/relieve stress	New & different
Relax/relieve stress	New & different	Create lasting memories	Create lasting memories
Create lasting memories	Break from day-to-day	Break from day-to-day	Relax/relieve stress
Enrich relationships	Create lasting memories	New & different	Break from day-to-day
New & different	Enrich relationships	Enrich relationships	Enrich relationships

The same benefits are least likely to be deemed *highly important* to Western Canada's domestic pleasure travellers whether or not they engage in group travel. These less sought outcomes of holidays include generating stories to tell, pampering, and, at the bottom of everyone's list, solitude and isolation.

³³ For full array, see Table 30.

**TABLE 30: BENEFITS SOUGHT
FROM PLEASURE TRAVEL
(HIGHLY IMPORTANT)**

	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
		Group Tourists with Overnight Pleasure Trips in . . .		
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
<i>% Stating "Highly Important" in rank order by Group Tourists in Western Canada</i>				
See/do something new/different	49%	61%	58%	63%
Relax/relieve stress	66%	61%	62%	58%
Break from day-to-day environment	68%	59%	59%	56%
Create lasting memories	57%	59%	60%	59%
Enrich relationship with partner/children	55%	50%	49%	51%
Knowledge of history, cultures, places	27%	42%	40%	44%
Enrich perspectives	32%	42%	42%	42%
Keep family ties alive	46%	42%	42%	42%
No fixed schedule	44%	39%	40%	37%
Stimulate mind/intellectual challenge	19%	28%	26%	29%
Renew personal connections (non-family)	21%	21%	24%	20%
Physical challenge	18%	20%	20%	20%
Stories to share	13%	15%	14%	15%
To be pampered	10%	13%	11%	14%
Solitude and isolation	10%	7%	8%	7%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 23.

C. Incidence of Summer/Winter Trips

Almost all of Western Canada's Group Tourists say that they have taken an overnight pleasure trip during the summer months (92%) and four-fifths make the same claim about winter (80%). The level of summer travel is essentially the same among Group Tourists and domestic overnight pleasure travellers to the region as a whole.

Group Tourists are, however, more likely to have taken *winter* trips than are other Canadian travellers. These winter trips could be associated with this market's interest in alpine skiing and therefore might involve a winter ski trip to Alberta or British Columbia. Conversely, the trips may be linked to Group Tourists' propensity to seek a respite from Canada's winter by travelling to Mexico, the Caribbean and U.S. sun/sea states.

TABLE 31: INCIDENCE OF SUMMER/WINTER PLEASURE TRIPS	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
		Group Tourists with Overnight Pleasure Trips in . . .		
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Took Overnight Pleasure Trip in Past 2 Years In . . .				
Summer	91%	92%	93%	94%
Winter	71%	80%	81%	80%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 22.

D. Incidence of Overnight Cruises

Overnight cruises represent a growth market and one that is especially important to tourism businesses in British Columbia. The “organized” nature of cruise travel likely explains why Western Canada’s Group Tourists are more than twice as likely to have taken an overnight cruise in the past couple of years (33%) than are typical domestic visitors in the West (14%).

Ocean cruises are considerably more popular than those on the Great Lakes. About one-tenth of Group Tourists claim to have recent Caribbean and/or other ocean cruise experiences and one-twelfth say they have taken an Alaska cruise.

TABLE 32: INCIDENCE OF OVERNIGHT CRUISE TRIPS – PAST 2 YEARS	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
	Group Tourists with Overnight Pleasure Trips in . . .			
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Took any overnight cruise in past 2 years	14%	33%	33%	34%
Type of Cruise/Destination				
Ocean - Alaska	3%	8%	7%	9%
Ocean - Caribbean	5%	11%	11%	12%
Ocean – Other	5%	13%	12%	14%
Great Lakes	*	1%	2%	1%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 14. *Less than 0.5%.

E. Memberships in Various Organizations

Compared to all Canadian overnight pleasure travellers to destinations in Alberta and/or British Columbia, Group Tourists tend to be “joiners”. While membership in auto clubs, frequent flyer programs and sports clubs are most common, these group-oriented Canadians are also more likely to have memberships in community service clubs, travel clubs, and hotel or car rental loyalty programs than are typical overnight pleasure travellers to the region.

TABLE 33: MEMBERSHIPS	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
		Group Tourists with Overnight Pleasure Trips in . . .		
	Total	Western Canada	Alberta	British Columbia
Unweighted base	(8,916)	(1,564)	(1,019)	(1,203)
Weighted, Projected	6,619,000	1,035,000	621,000	826,000
Auto club	45%	50%	51%	49%
Frequent flyer program	35%	47%	45%	47%
Sports club	28%	34%	38%	35%
Hotel/car rental loyalty program	12%	18%	18%	18%
Community service club	11%	16%	18%	17%
Book/reading club	6%	8%	8%	8%
Travel club	3%	8%	5%	9%
Hobby club	6%	8%	8%	8%
Nature/environmental club	5%	6%	6%	6%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 33.

IX. Appendices

A. Activity-Based Trip Motivators – Major & Intermediate Categories

TABLE A1: ACTIVITY MOTIVATORS –
MAJOR & INTERMEDIATE CATEGORY
OVERVIEW

	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
	Group Tourists with Overnight Pleasure Trips in . . .			
	Total (8,916)	Western Canada (1,564)	Alberta (1,019)	British Columbia (1,203)
Unweighted base	6,619,000			
Weighted, Projected				
Participatory Outdoor Activities	57%	60%	62%	61%
Outdoor Water Based Activities	41%	45%	47%	46%
Fishing	10%	11%	12%	12%
Boating (<i>motor/sail boat</i>)	6%	7%	9%	8%
Sunbathing at beach	17%	20%	22%	19%
Swimming in oceans	6%	10%	10%	11%
Swimming in lakes	10%	9%	9%	
Outdoor Winter Activities	20%	23%	26%	24%
Alpine skiing	14%	18%	20%	19%
Outdoor Land Based Activities	41%	44%	47%	45%
Golf (any)	7%	9%	10%	9%
Hiking	10%	13%	13%	14%
Flora/Fauna Viewing	6%	10%	10%	10%
Nature park	13%	16%	17%	17%
Camping*	19%	19%	19%	18%
Cultural/Learning Activities & Events	26%	36%	36%	38%
Performing Arts	8%	12%	11%	13%
Live theatre	5%	8%	7%	9%
Exhibits, Architecture, Historic Sites/Buildings & Museums	14%	22%	22%	23%
Art galleries	4%	7%	6%	8%
Historic sites, buildings	10%	19%	19%	20%
Museums	6%	10%	11%	10%
Strolling Around a City to Observe Architecture	8%	14%	13%	15%
Theme/Amusement Parks/Other Entertainment/Events	32%	37%	40%	37%
Fairs/Festivals	12%	19%	22%	19%
Casinos	5%	9%	9%	9%
Theme/Amusement Parks/Movies	12%	15%	15%	15%
Gardens/Aquariums/Zoos/Planetariums	7%	9%	11%	9%
Other Entertainment	16%	18%	20%	18%
Food & Wine	12%	19%	19%	19%
Dining	7%	11%	12%	11%
Restaurants with local cuisines	4%	7%	7%	7%
Local outdoor cafes	2%	6%	5%	5%
Other Food	5%	9%	8%	10%
Wineries for day visits/ tastings	3%	8%	7%	9%
Lodging	32%	34%	34%	34%
Resort/Spa	19%	22%	22%	22%
Lake/Riverside Resort	8%	11%	12%	10%
Ski Resort	9%	9%	10%	10%
Seaside Resort	8%	12%	13%	12%
Health Spas	3%	5%	5%	4%
Other Lodging	21%	20%	21%	20%
Camping*	15%	14%	16%	14%
Shopping	9%	13%	12%	12%
Clothing, shoes, jewellery	6%	9%	9%	8%
Local arts and crafts	3%	6%	4%	6%
Books/music stores	3%	5%	5%	5%
Spectator Sports	15%	15%	17%	14%
Team Sports, Tournaments, Games	10%	10%	11%	9%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, pages 7, 8, 9, 10, 11. *Camping is also included in the Net outdoor land-based activity group and the lodging activity group.

B. Detailed Place of Residence Summary Table

TABLE A2: PLACE OF RESIDENCE	Canadian Overnight Pleasure Travellers to Destinations in Western Canada			
	Total	Group Tourists with Overnight Pleasure Trips in . . .		
		Western Canada	Alberta	British Columbia
Unweighted base (8,916)		(1,564)	(1,019)	(1,203)
Weighted, Projected 6,619,000		1,035,000	621,000	826,000
Atlantic Canada	3%	2%	3%	2%
Halifax	1%	1%	1%	1%
Quebec	5%	8%	6%	8%
Montréal	3%	6%	5%	6%
Quebec City	*	*	1%	*
Gatineau	*	*	*	*
Ontario	19%	25%	19%	25%
Ottawa	2%	3%	2%	3%
Kingston	*	*	*	*
Oshawa	1%	*	*	*
Toronto	9%	14%	10%	14%
Hamilton	1%	2%	2%	2%
Niagara Falls*	*	1%	1%	1%
Kitchener	1%	1%	1%	1%
London	1%	1%	1%	1%
Windsor	*	*	*	*
Sudbury	*	*	-	-
Thunder Bay	*	1%	*	*
Manitoba	4%	5%	6%	3%
Winnipeg	3%	3%	4%	2%
Saskatchewan	6%	6%	9%	4%
Regina	1%	2%	2%	1%
Saskatoon	2%	2%	2%	1%
Alberta	27%	20%	28%	18%
Calgary	9%	6%	8%	5%
Edmonton	9%	6%	10%	6%
British Columbia	36%	34%	28%	40%
Vancouver	18%	23%	17%	27%
Victoria	3%	3%	2%	4%

Source: TAMS Canada Special Tabulations, Research Resolutions, Volumes 2, 3, page 40. Note: All cities listed are Census Metropolitan Areas (CMAs). *Niagara Falls = St. Catharines-Niagara CMA. *Less than 0.5%.

C. Trip Activity Groupings

To the extent possible, activity groupings have been kept consistent between the U.S. and Canadian Group Tourists tabulations and reports. Because Statistics Canada suppressed some low-incidence activities in the public use micro data file available for analysis by the supplier, however, exact duplication was not possible. In the following list, asterisked (*ed) activities are those included for both *any participation* and *main reason* for a trip in the U.S. report but unavailable in the Canadian data for *main reason*.

Following are the major and intermediate categories used throughout this report and in the accompanying tabulations. The table identifies the individual activities that contribute to each intermediate group and the intermediate groups that contribute to forming the major category. Note that some activities are included more than once (see “duplication”).

Major Groups	Intermediate Groups	Individual Activities	Duplication	
Any Participatory Outdoor Activities				
	Any Outdoor Water Based Activities (NET)			
	Fishing (Any)			
			Fishing — fresh water	
			Fishing — salt water	
			Fishing — trophy fishing	
		Kayaking/canoeing (Any)		
			Kayaking or canoeing — freshwater	
			Kayaking or canoeing — ocean	
		Motor/Sail boating (Any)		
			Motor boating	
			Sailing	
		White water rafting		
		Diving/snorkelling (Any)		
			Scuba diving in lakes/rivers	
			Scuba diving in sea/ocean	
			Snorkelling in lakes or rivers	
			Snorkelling in sea/ocean	
		Other Water-Based Activities (NET)		
			Parasailing*	
			Kite surfing *	
			Sunbathing or sitting on a beach	
			Swimming in lakes	
			Swimming in oceans	
			Water skiing	
			Wind surfing	
		Any Outdoor Winter Activities (NET)		
		Nordic Skiing (Any)		
			Skiing — Cross country	
		Skiing — Cross country or back country as an overnight touring trip		
		Skiing — Ski Jouring *		
	Alpine Skiing (Any)			
		Skiing — Downhill		

Major Groups	Intermediate Groups	Individual Activities	Duplication
		Skiing — Heli-skiing *	
		Snowboarding	
	Snowmobiling (Any)		
		Snowmobiling — Day use on organized trail	
		Snowmobiling — As an overnight touring trip	
	Other Outdoor Winter (Any)		
		Dog sledding	
		Fishing — ice fishing	
		Ice-skating	
		Snowshoeing	
	Any Outdoor Land Based Activities (NET)		
	ATVs (Any)		
		All terrain vehicle (ATV) — Used one as part of a same day excursion while on a trip of one or more nights	
		All terrain vehicle (ATV) — Used one as part of an overnight touring trip	
	Climbing (Any)		
		Climbing — Ice climbing *	
		Climbing — Rock climbing	
		Climbing — Mountain climbing/trekking	
	Cycling (Any)		
		Cycling — Recreational cycling, same day excursion	
		Cycling — Mountain biking	
		Cycling — as an overnight touring trip	
	Golf (Any)		
		Golfing — played an occasional game while on a trip	
		Golfing —played during a stay at a golf resort for one or more nights	
		Golfing — took a package golf tour to play on various courses	
	Hiking (Any)		
		Hiking — same day excursion while on a trip of one or more nights	
		Hiking/Backpacking in wilderness settings with overnight camping or lodging	
	Horseback riding (Any)		
		Horseback riding — same day horseback riding excursion while on a trip of one or more nights	
		Horseback riding — traveled by horse with an overnight stop along the way	
	Hunting (Any)		
		Hunting — Big game	
		Hunting — Small game	
		Hunting — Birds	
	Motorcycling (Any)		
		Motorcycling — day excursion while on a trip of one or more nights	
		Motorcycling — as an overnight touring trip	
	Nature park — visited national, provincial/state park		
	Flora/Fauna Viewing (Any)		
		Wildflowers/flora viewing	
		Wildlife viewing — Bird watching	
		Wildlife viewing — Whale watching and other marine life	
		Wildlife viewing — Land based animals	
	Camping (Any)		
		A public campground in a national, state, provincial or municipal park	Also in lodging
		A private campground	Also in lodging
		A camp site in a wilderness setting (not a campground)	Also in lodging
	Other Outdoor Land/Air Activities (Any)		
		Bungee jumping *	
		In-line/roller blading	

Major Groups	Intermediate Groups	Individual Activities	Duplication
		Mini-golf	
		Skateboarding *	
		Viewing northern lights	
		Hang gliding *	
		Hot air ballooning	
		Parachuting	
		Fitness — Jogging or exercising outdoors	
Cultural/Learning Activities & Events			
	Aboriginal Culture/Events (Any)		
		Aboriginal cultural experiences in a remote or rural setting where you stayed for one or more nights	
		Aboriginal heritage attractions (e.g., museums, interpretive centres)	
		Aboriginal festivals and events (e.g., Pow Wows)	
		Aboriginal cuisine (tasted or sampled)	Also in "food"
		Aboriginal arts and crafts shows	
		Aboriginal outdoor adventure and/or sports	
	Performing Arts (Any)		
	Music Performances (Classical/Jazz/Opera)		
		Classical or symphony concert	
		Jazz concert	
		Opera	
	Live Theatre		
	Ballet or other dance performances		
	Cultural Festivals/Events (Any)		
		International film festivals	
		Literary festivals or events	
		Music festivals	
		Theatre festivals	
	Exhibits, Architecture, Historic Sites/Buildings & Museums		
	Art galleries		
	Historic Sights/Buildings (Any)		
		Historical replicas of cities or towns with historic re-enactments	
		Paleontological/archaeological sites	
		Well known historic sites or buildings	
		Other historic sites, monuments and buildings	
	Museums (Any)		
		Museum — Children's museums	
		Museum — General history or heritage museums	
		Museum — Science or technology museums	
		Museum — Military/war museums	
		Curatorial tours	Also in Hands On
	Other Exhibits, Architecture, Historic Sites/Buildings & Museums (Any)		
		Strolling around a city to observe its buildings and architecture	
	Hands on Learning Activities (Any)		
		Archaeological digs	
		Cooking/wine tasting courses/school NET	
		Cooking/wine tasting courses	Also in food/wine
		Cooking school *	Also in food
		Wine tasting school *	Also in wine
		Courses to learn another language	
		Curatorial tours	Also in museums
		Harvesting and/or other farm operations	
		Historical re-enactments (as an actor)	
		Interpretive program at a historic site or national/provincial park	
		Wilderness skills courses	

Major Groups	Intermediate Groups	Individual Activities	Duplication
Theme/Amusement Parks/Other Entertainment/Events (Any)			
	Fairs/Festivals (Any)		
		Carnivals	
		Farmers' markets or country fairs	
		Exhibitions or fairs	
		Religious festivals	
		Food/drink festivals	Also in food/wine
		Ethnic festivals	
		Western theme events, such as rodeos	
		Gay Pride parades	
		Firework displays	
		Hot air balloon festivals	
		Comedy festivals	
	Casino		
	Theme/Amusement Parks/Movies (Any)		
		Amusement park	
		Garden theme park	
		Musical attractions	
		Movie theme park	
		Science & technology theme park	
		Water theme park	
		Wax museums	
		Entertainment farms (e.g. corn maze, petting barnyard)	
	Gardens/Aquariums/Zoos/Planetariums (Any)		
		Planetarium	
		Botanical gardens	
		Aquariums	
		Zoos	
	Other Entertainment		
		Country/western music concerts	
		Rock & roll / popular concert	
		Stand-up comedy clubs and other variety shows	
		Circus	
		Free outdoor performances (e.g., theatre, concerts) in a park setting	
		Live theatre with dinner	
		Went to the movies/cinema	
		Went to IMAX movie theatres	
Food & Wine (Any)			
	Dining (Any)		
		Dining — restaurants offering local ingredients and recipes	
		Dining — high-end restaurants of an international reputation	
		Dining — other high-end restaurants	
		Dining at a farm	
		Went to local outdoor cafes	
	Other Food (Any)		
		Shop or browse — gourmet foods in retail stores	
		Went fruit picking at farms or open fields	
		Visited food processing plants such as a cheese factory	
		Cooking school	Also in Lodging
		Country inn or resort because it had a gourmet restaurant on the premises	Also in Lodging
		Aboriginal cuisine (tasted or sampled)	Also in Aboriginal
	Wine/Beer (Any)		
		Went to wineries for day visits and tasting	
		Went to breweries for day visits and tasting	
		Wine tasting school *	Also in Lodging
	Other Food/Wine (Any)		

Major Groups	Intermediate Groups	Individual Activities	Duplication
		Food/drink festivals	Also in "Theme Parks/Entertainment"
		Cooking/wine tasting courses	Also in "hands on"
Lodging			
	Wilderness/Remote		
		Remote or fly-in wilderness lodge	
		Remote or fly-in wilderness outpost	
		Wilderness lodge you can drive to by car	
	Resort/Spa (Any)		
		Lakeside/riverside resort	
		Ski resort or mountain resort	
		Seaside resort	
		Health spa	
	Other Lodging (Any)		
		Farm or guest ranch	
		On a houseboat	
		A motor home or RV while traveling or touring (not a camping trip)	
		A public campground in a national, state, provincial or municipal park	Also in "Outdoors"
		A private campground	Also in "Outdoors"
		A camp site in a wilderness setting (not a campground)	Also in "Outdoors"
		Wine tasting school *	Also in Food/Wine
		Cooking school *	Also in Food/Wine
Shopping (Any)			
		Shop or browse — bookstores or music stores	
		Shop or browse — antiques	
		Shop or browse — gourmet foods in retail stores	Also in "food"
		Shop or browse — local arts & crafts studios or exhibitions	
		Shop or browse — clothing, shoes and jewellery	
		Shop or browse — greenhouse or garden centre	
Spa (Any)			
		Day visit to a health and wellness spa while on a trip of one or more nights	
		Health spa (overnight)	Also in "Lodging"
Spectator Sports (Any)		Individual activities only – no NETS	
Team Sports, Tournaments, Games (Any)		Individual activities only – no NETS	
Other Miscellaneous Activities (Any)			
		Well known natural "wonders"	
		Fitness — Working out in a fitness centre	
		Recreational dancing	
		Photography	
Touring/Cruises			
Any Organized Group Tour			
	Any Organized/Guided Overnight Group Tour		
		Different locations	
		Single location	
	An organized or guided group day tour excursion		
Any Self-Guided Touring			
	A self-guided tour that was not part of an organized or guided group on which you stayed in different places for one or more nights		
	A self-guided same-day tour excursion that was not part of an organized or guided group while on a trip of one or more nights		
Any Overnight Touring (Organized/Self-guided)			
	Any Organized/Guided Overnight Group Tour		

Major Groups	Intermediate Groups	Individual Activities	Duplication
	A self-guided tour that was not part of an organized or guided group on which you stayed in different places for one or more nights		
Day Touring (Organized/Self-guided)			
	An organized or guided group day tour excursion		
	A self-guided same-day tour excursion that was not part of an organized or guided group while on a trip of one or more nights		
Any Cruise			
	Ocean cruise – Alaska		
	Ocean cruise – Caribbean		
	Ocean cruise – Other		
	Great Lakes cruise		
	Cruise on the St. Lawrence River		
	Cruise on another lake or river		
	Submarine cruise		
	Some other type of cruise		
Organized Overnight Tour/Cruise (NET)			
	Any Organized/Guided Overnight Group Tour		
	Any Cruise		

D. “Life Stages” Variable

Minimal information on life stages is available in the Statistics Canada public use micro data file (PUMF) and the variable on household size has been suppressed in this file. To provide at least some information on these measures in a meaningful format, the summary variables from Question RI_G01 (*With whom does respondent live?*) provided in the PUMF have been renamed to bring them closer to common usage for household composition variables. The reader should note that the new nomenclature is not as precise as that used by Statistics Canada.

New Name	Statistics Canada’s Variable Name
Alone	<ul style="list-style-type: none"> • Alone
“Couples – No Children”	<ul style="list-style-type: none"> • With spouse/partner, and no birth/step/adopted children 17 years or under, but possibly someone else
“Two Adults with Children under 18”	<ul style="list-style-type: none"> • With spouse/partner, and birth/step/adopted children 17 years or under, and possibly someone else
“Couples with Adult Children”	<ul style="list-style-type: none"> • With spouse/partner, and birth/step/adopted children 18 or older, and possibly someone else, but no birth/step/adopted children 17 or under
“Single Parent Families”	<ul style="list-style-type: none"> • With birth/step/adopted children, and no spouse/partner, but possibly someone else
“Other”	<ul style="list-style-type: none"> • With someone other than spouse/partner or birth/step/adopted children