

CANADIAN TRAVEL MARKET

Out-of-Province Travel by Residents of British Columbia

A Profile Report

February 7, 2008

Prepared by Lang Research Inc. on behalf of:

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



Executive Summary

Over the last two years, 78.5% (2,611,359) of adult British Columbia residents took an out-of-province, overnight trip (for any purpose). 89.4% (2,334,739) of those who travelled outside of British Columbia took at least one out-of-province, pleasure trip in the past two years. Those taking out-of-province trips were more likely to have travelled outside of Canada (78.5%) than within Canada (58.8%). In terms of Canadian travel, British Columbians most often visited Alberta (50.9%). In terms of out-of-country travel, they most often visited the United States (66.3%) and overseas destinations (30.5%).

Relative to within-province travellers, out-of-province travellers are more likely to be 55 to 64 years old, married and without dependent children. Out-of-province travellers are also much more likely to have university degrees and higher household incomes. As such, affluent, mature couples are over-represented among out-of-province travellers.

Out-of-province travellers were much more active in culture and entertainment activities while on trips than within-province travellers. They were especially likely to have visited historical sites, museums and art galleries, to have attended live art performances and sporting events, to have gambled in casinos, to have taken part in a wine, beer or food tasting and to have visited spas while on trips. Out-of-province travellers were also much more likely to have played golf, gone skiing, taken part in fitness activities and participated in nature-oriented activities. On the other hand, within-province travellers more often went fishing, horseback riding and motorcycling while on trips. Out-of-province travellers most often stayed at resorts while within-province travellers were more likely to go camping. Out-of-province travellers were especially likely to have taken organized tours, city tours and scenic countryside drives. Within-province travellers rarely took organized tours and primarily took self-guided tours and scenic country-side drives.

Out-of-province travellers prefer luxurious vacations at culturally distinctive destinations that are both intellectually stimulating and physically challenging and that offer novelty and opportunities to learn. Within-province travellers prefer vacations that allow them to keep family ties alive, at destinations that are conveniently accessible by car, have a familiar culture and language, lots of activities for children and that have either budget-priced accommodation or camping available.

Out-of-province travellers are much more likely than within-province travellers to use the Internet to plan and book travel. Out-of-province travellers may be most effectively reached through travel media, cuisine-related media, sports media, city lifestyle magazines, business and finance magazines and soft rock radio stations. Within-

province travellers may be best reached through home-oriented magazines, daytime soap operas and both alternative rock music and country music radio stations.

Travel Activity and Motivation Survey (TAMS)

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

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

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

TAMS was sponsored by the following organizations:

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

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

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

This report profiles British Columbia residents who took a pleasure trip outside of the province and compares them with pleasure travellers who did not take a trip outside of the province. This report is part of a series of eight reports reviewing the provincial and regional travel activities of Canadian Pleasure Travellers prepared using the Canadian TAMS database.

Out-of-Province Travel by Residents of British Columbia

Market Incidence

Over the last two years, 78.5% (2,611,359) of adult British Columbia residents took an out-of-province, overnight trip (for any purpose). 89.4% (2,334,739) of those who took a trip outside of British Columbia report that they took at least one out-of-province, pleasure trip during the past two years.

Overall, 87.7% of those who took a pleasure trip (i.e., Pleasure Travellers) report taking at least one pleasure trip outside of the province. British Columbia residents were the fourth most likely to take pleasure trips outside of their province during the last two years after residents of Manitoba, Saskatchewan and Alberta.

58.8% of British Columbia residents who took out-of-province pleasure trips reported visiting other Canadian destinations. 78.5% of those who took out-of-province pleasure trips went to destinations outside of Canada.

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

| | British Columbia |
|---|---------------------|
| Number Taking a Trip Outside of the Province (Any Purpose) ² | 2,611,359 |
| Percent of Provincial Population | 78.5% |
| Number Taking a Pleasure Trip Outside of Province ³ | 2,334,739 |
| Percent of Pleasure Travellers in Province ⁴ | 87.7% |
| Percent Taking a Pleasure Trip to Another Canadian Destination Outside of Province ⁵ | 58.8% |
| Percent Taking a Pleasure Trip Outside of Canada ⁶ | 78.5% |

- 1 - "Trips" are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.
- 2 - This row reports the number of British Columbia residents who took at least one overnight trip outside British Columbia in the last two years for any purpose.
- 3 - This row reports the number of British Columbia residents who took an out-of-province "pleasure trip" during the past two years.
- 4 - "Pleasure Travellers" are defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years. This row reports the percent of British Columbia "Pleasure Travellers" who took an out-of-province pleasure trip in the last two years.
- 5 - This row reports the percent of out-of-province, pleasure trips to other Canadian destinations.
- 6 - This row reports the percent of out-of-province, pleasure trips to destinations outside of Canada.

Travel Activity (During Last Two Years)

85.2% of those who took a trip outside of British Columbia also took a trip within the province during the last two years. In terms of Canadian travel, 51.4% took an out-of-province trip to an adjacent province or territory, most often Alberta (50.9%). 39.9% took a trip to a non-adjacent province or region and were most likely to have visited Ontario (24.8%), Saskatchewan (12.2%) and Quebec (12.1%).

In terms of out-of-country travel, British Columbians primarily took trips to the United States (66.3%). However, 23.3% travelled to Mexico, 30.5% took an overseas trip and 9.4% visited the Caribbean during the last two years.

Fig. 3 Percent Travelling to Other Canadian Destinations during Past Two Years

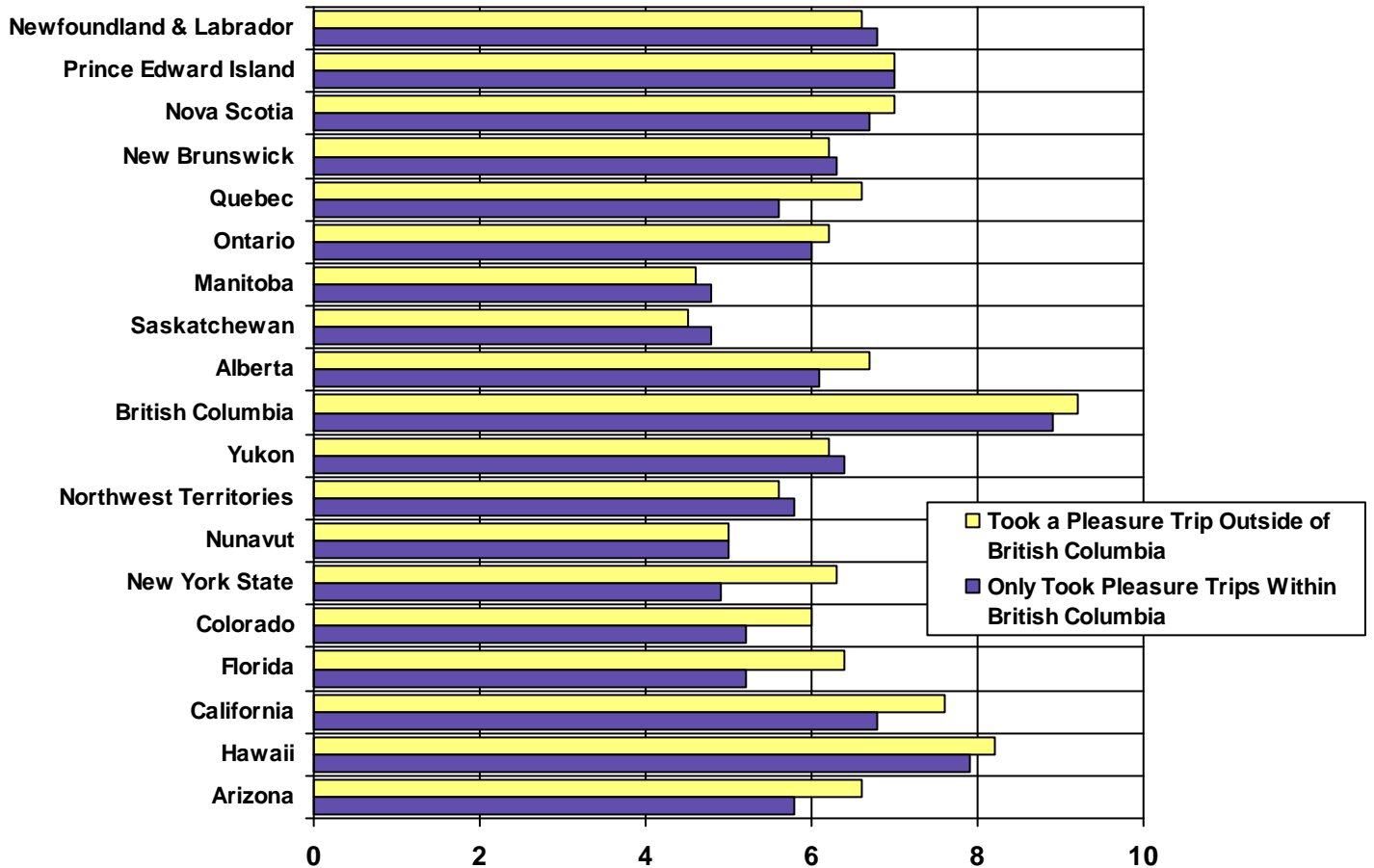
| | Took a Pleasure Trip Outside of British Columbia | Only Took Pleasure Trips Within British Columbia | Total Pleasure Travellers in British Columbia |
|--|--|--|---|
| Size of Market | 2,334,739 | 327,682 | 2,662,421 |
| Canada | 94.9% | 100.0% | 95.5% |
| Took a trip within own province/ region | 85.2% | 100.0% | 87.0% |
| Took a trip to an adjacent province/ region | 51.4% | 0.0% | 45.1% |
| Took a trip to non-adjacent province/ region | 39.9% | 0.0% | 35.0% |
| Newfoundland & Labrador | 1.2% | 0.0% | 1.0% |
| Prince Edward Island | 2.8% | 0.0% | 2.5% |
| New Brunswick | 5.3% | 0.0% | 4.7% |
| Nova Scotia | 3.1% | 0.0% | 2.7% |
| Quebec | 12.1% | 0.0% | 10.6% |
| Ontario | 24.8% | 0.0% | 21.7% |
| Manitoba | 9.0% | 0.0% | 7.9% |
| Saskatchewan | 12.2% | 0.0% | 10.7% |
| Alberta | 50.9% | 0.0% | 44.6% |
| British Columbia | 85.2% | 100.0% | 87.0% |
| Yukon | 3.4% | 0.0% | 2.9% |
| Northwest Territories | 1.6% | 0.0% | 1.4% |
| Nunavut | 0.3% | 0.0% | 0.2% |
| United States | 66.3% | 0.0% | 58.1% |
| Mexico | 23.3% | 0.0% | 20.5% |
| Caribbean | 9.4% | 0.0% | 8.2% |
| All other destinations | 30.5% | 0.0% | 26.7% |

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

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

Out-of-province travellers perceive several Canadian destinations (e.g., British Columbia, Alberta, Ontario, & especially Quebec) to be slightly more appealing than do those who travelled exclusively within the province. Out-of-province travellers also have a more favourable impression of all six U.S. reference states than do within-province travellers. It is not possible to determine whether these attitudinal differences are the result of their travel activities or one the reasons why they travel outside of British Columbia.

Fig. 4 Overall Appeal Ratings of Provinces, Territories and Selected U.S. States on a 10-Point Appeal Rating Scale (Higher Scores=More Appealing)



Culture and Entertainment Activities Pursued While on Trips

British Columbia residents who took a trip outside of the province were much more likely to have participated in culture and entertainment activities while on trips than those who only took trips within the province. Out-of-province travellers were especially like to have gone shopping and dining and to have visited historical sites, museums and art galleries, festival and fairs and theme parks while on trips. They were also more likely than within-province travellers to have attended live art performances (e.g., high art performances, live theatre, music concerts) and sporting events (e.g., professional sporting events), to have gambled in casinos, to have taken part in a wine, beer or food tasting, to have participated in aboriginal cultural experiences and to have visited spas while on trips. These differences partially reflect the fact that out-of-province travellers are more affluent and better able to afford such activities.

Fig. 5 Culture and Entertainment Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Culture & Entertainment Activity)

| | Took a Pleasure Trip Outside of British Columbia | Only Took Pleasure Trips Within British Columbia | Total Pleasure Travellers in British Columbia | Index |
|---|--|--|---|-------|
| Size of Market | 2,334,739 | 327,682 | 2,662,421 | 100 |
| Shopping & Dining | 89.1% | 69.2% | 86.7% | 103 |
| Historical Sites, Museums & Art Galleries | 65.4% | 46.1% | 63.1% | 104 |
| Fairs & Festivals | 44.0% | 20.8% | 41.2% | 107 |
| Theme Parks & Exhibits | 42.4% | 23.4% | 40.1% | 106 |
| Musical Concerts, Festivals & Attractions | 32.1% | 23.7% | 31.1% | 103 |
| Wine, Beer & Food Tastings | 31.8% | 8.5% | 28.9% | 110 |
| Casinos | 27.1% | 15.3% | 25.7% | 106 |
| Science & Technology Exhibits | 24.7% | 18.4% | 24.0% | 103 |
| Aboriginal Cultural Experiences | 21.0% | 8.9% | 19.5% | 108 |
| Garden Theme Attractions | 20.9% | 13.1% | 19.9% | 105 |
| Professional Sporting Events | 17.9% | 9.1% | 16.8% | 106 |
| Live Theatre | 17.9% | 6.6% | 16.5% | 108 |
| Agro-Tourism | 17.4% | 11.3% | 16.7% | 105 |
| Spas | 12.9% | 3.0% | 11.7% | 110 |
| High Art Performances | 11.4% | 4.0% | 10.5% | 109 |
| Amateur Tournaments | 9.9% | 9.9% | 9.9% | 100 |
| Participatory Historical Activities | 8.8% | 4.9% | 8.4% | 106 |
| Comedy Festivals & Clubs | 7.8% | 8.0% | 7.9% | 100 |
| Equestrian & Western Events | 7.8% | 5.7% | 7.6% | 104 |
| Literary & Film Festivals | 3.6% | 1.4% | 3.3% | 108 |
| National & International Sporting Events | 3.2% | 0.3% | 2.8% | 113 |

Culture and Entertainment Activities Pursued While Not on Trips

Out-of-province travellers are also more active in local culture and entertainment activities while not travelling than those who travelled exclusively within the province. Out-of-province travellers are especially likely to patronize local live art performances (e.g., the opera, the ballet, classical music concerts, live theatre, jazz clubs, rock concerts), to attend professional sports events and to stay overnight in a local hotel or B&B. They are also more likely to visit local museums and art galleries as well as local zoos and aquariums, local botanical gardens and local amusement or theme parks. By contrast, those who travelled exclusively within the province during the last two years are more likely to attend local rodeos and local festivals and fairs. Once again, these differences may reflect the relative affluence of out-of-province travellers.

Fig. 6 Culture and Entertainment Activities Pursued While Not on Trips

| | Took a Pleasure Trip Outside of British Columbia | Only Took Pleasure Trips Within British Columbia | Total Pleasure Travellers in British Columbia | Index |
|---|--|--|---|-------|
| Size of Market | 2,334,739 | 327,682 | 2,662,421 | 100 |
| Going out to eat in restaurants | 92.0% | 85.4% | 91.2% | 101 |
| Going to festivals or fairs | 61.4% | 70.9% | 62.6% | 98 |
| Going to pick-your-own farms or farmers' market | 44.3% | 43.4% | 44.2% | 100 |
| Going to amateur sporting events | 44.1% | 40.2% | 43.6% | 101 |
| Going to historic sites or heritage buildings | 39.4% | 41.9% | 39.7% | 99 |
| Going to live theatre | 36.3% | 20.1% | 34.3% | 106 |
| Going to museums | 35.6% | 28.0% | 34.7% | 103 |
| Going to art galleries or art shows | 34.6% | 27.0% | 33.6% | 103 |
| Going to professional sporting events | 34.0% | 22.5% | 32.6% | 104 |
| Going to zoos or aquariums | 31.8% | 22.5% | 30.6% | 104 |
| Going to botanical gardens | 28.0% | 21.6% | 27.2% | 103 |
| Going to bars with live pop or rock bands | 27.0% | 21.6% | 26.3% | 102 |
| Going dancing | 25.8% | 21.5% | 25.3% | 102 |
| Going to amusement or theme parks | 25.8% | 19.6% | 25.0% | 103 |
| Going to rock music concerts | 22.6% | 16.6% | 21.8% | 103 |
| Going to classical music concerts | 20.3% | 8.1% | 18.8% | 108 |
| Going to gamble in casinos | 19.0% | 19.0% | 19.0% | 100 |
| Going to day spas | 14.6% | 8.3% | 13.8% | 106 |
| Staying overnight in a hotel or B&B in own city | 10.5% | 6.8% | 10.0% | 105 |
| Going to jazz clubs | 9.5% | 3.6% | 8.7% | 108 |
| Going to the opera | 9.0% | 2.9% | 8.3% | 109 |
| Going to the ballet | 8.4% | 4.1% | 7.9% | 107 |
| Going to rodeos | 7.8% | 11.6% | 8.2% | 94 |

Outdoor Activities Pursued While on Trips

Despite their relative maturity, out-of-province travellers were much more active in outdoor activities while on trips than within-province travellers. Relative to within-province travellers, out-of-province travellers were especially likely to have taken part in resort-based, water activities (e.g., ocean activities, sailing & surfing, scuba diving and snorkeling). They were also more likely to have played golf, gone skiing (e.g., downhill skiing, cross-country skiing), taken part in fitness activities (e.g., exercising and jogging, cycling) and to have participated in nature-oriented activities (e.g., wildlife viewing, hiking, climbing, paddling) while on trips. On the other hand, those who travelled exclusively within the province were more likely to have gone fishing, horseback riding and motorcycling while on trips during the last two years.

Fig. 7 Outdoor Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Outdoor Activity)

| | Took a Pleasure Trip Outside of British Columbia | Only Took Pleasure Trips Within British Columbia | Total Pleasure Travellers in British Columbia | Index |
|---|--|--|---|-------|
| Size of Market | 2,334,739 | 327,682 | 2,662,421 | 100 |
| Ocean Activities (e.g., swimming in ocean, sunbathing) | 53.7% | 36.9% | 51.6% | 104 |
| Wildlife Viewing | 47.4% | 36.7% | 46.1% | 103 |
| Boating & Swimming (e.g., motorboating, swimming in lakes) | 40.6% | 32.4% | 39.6% | 103 |
| Hiking, Climbing & Paddling | 39.5% | 34.4% | 38.8% | 102 |
| Fishing | 21.4% | 30.8% | 22.6% | 95 |
| Sports & Games (e.g., tennis, board games) | 21.3% | 14.0% | 20.4% | 104 |
| Exercising & Jogging | 19.8% | 13.4% | 19.0% | 104 |
| Golfing | 19.1% | 5.8% | 17.5% | 109 |
| Downhill Skiing & Snowboarding | 17.8% | 8.1% | 16.6% | 107 |
| Cycling | 15.5% | 10.4% | 14.8% | 104 |
| Team Sports (e.g., hockey, baseball) | 10.3% | 6.7% | 9.8% | 104 |
| Snowmobiling & ATVing | 9.6% | 5.7% | 9.1% | 105 |
| Skating (e.g., ice skating, rollerblading) | 9.0% | 5.1% | 8.5% | 106 |
| Cross-country Skiing & Snowshoeing | 8.5% | 5.5% | 8.1% | 105 |
| Sailing & Surfing (e.g., sailing, windsurfing, parasailing) | 6.5% | 2.2% | 6.0% | 109 |
| Horseback Riding | 5.5% | 6.8% | 5.7% | 97 |
| Hunting | 4.6% | 3.6% | 4.5% | 103 |
| Wilderness Activities (e.g., wilderness skills course) | 3.8% | 0.8% | 3.4% | 111 |
| Freshwater Scuba & Snorkeling | 3.4% | 2.3% | 3.2% | 104 |
| Motorcycling | 3.0% | 6.6% | 3.4% | 87 |
| Extreme Air Sports (e.g., parachuting) | 1.8% | 0.2% | 1.6% | 112 |

Outdoor Activities Pursued While Not on Trips

Both out-of-province travellers and within-province travellers are active in outdoor activities while NOT travelling. However, those who travelled outside of British Columbia are more likely to go downhill skiing and snowboarding, golfing and canoeing and kayaking. They are also more likely to exercise and jog and to take part in team sports. By contrast, within-province travellers are more likely to participate in sportsmen activities (e.g., fishing, hunting) and nature-oriented activities such as camping and hiking. They are also more likely to garden, picnic, go cross-country skiing and ride an ATV while not travelling. Many of the activities more likely to be undertaken by within-province travellers are more common in rural areas or small towns. This may suggest that those who live in smaller towns or rural areas are less likely to take trips outside of British Columbia than those who live in larger urban centers.

Fig. 8 Outdoor Activities Pursued While NOT on Trips

| | Took a Pleasure Trip Outside of British Columbia | Only Took Pleasure Trips Within British Columbia | Total Pleasure Travellers in British Columbia | Index |
|--|--|--|---|-------|
| Size of Market | 2,334,739 | 327,682 | 2,662,421 | 100 |
| Day outing to a park | 78.0% | 74.0% | 77.5% | 101 |
| Exercising at home or at a fitness club | 67.0% | 60.0% | 66.1% | 101 |
| Gardening | 61.5% | 78.4% | 63.5% | 97 |
| Swimming | 60.7% | 60.4% | 60.6% | 100 |
| Picnicking | 59.9% | 70.7% | 61.2% | 98 |
| Hiking | 54.1% | 60.1% | 54.9% | 99 |
| Camping | 43.3% | 57.5% | 45.0% | 96 |
| Cycling | 41.5% | 46.8% | 42.1% | 98 |
| Jogging | 30.4% | 20.9% | 29.3% | 104 |
| Golfing | 27.9% | 21.8% | 27.2% | 103 |
| Sailing or other boating | 27.8% | 31.2% | 28.2% | 98 |
| Fishing | 27.2% | 38.0% | 28.5% | 95 |
| Playing team sports | 23.6% | 15.0% | 22.6% | 105 |
| Playing racquet sports (e.g., tennis or badminton) | 21.1% | 20.5% | 21.1% | 100 |
| Ice-skating | 20.8% | 18.5% | 20.5% | 101 |
| Canoeing or kayaking | 18.0% | 13.3% | 17.4% | 103 |
| Downhill skiing | 17.2% | 11.4% | 16.4% | 104 |
| Rollerblading | 10.7% | 5.5% | 10.1% | 106 |
| Riding an all-terrain vehicle (ATV) | 9.9% | 19.8% | 11.1% | 89 |
| Cross-country skiing | 8.9% | 14.1% | 9.6% | 93 |
| Snowboarding | 7.7% | 2.9% | 7.1% | 108 |
| Hunting | 6.6% | 10.9% | 7.1% | 93 |
| Horseback riding | 6.3% | 7.0% | 6.4% | 99 |
| Snowmobiling | 4.9% | 2.6% | 4.6% | 106 |
| Skateboarding | 1.8% | 2.3% | 1.9% | 97 |

Accommodation Stayed In While on Trips

Out-of-province travellers were much more likely than those who travelled exclusively within British Columbia to have stayed at resorts (e.g., seaside resorts, lakeside or riverside resorts, ski or mountain resorts) in the last two years. They were also more likely to have toured in a motor home or RV and to have stayed at accommodation specializing in fine cuisine (e.g., inns or resorts with gourmet dining, cooking or wine tasting schools). On the other hand, those who travelled exclusively within the province most often went camping (e.g., public campgrounds, private campgrounds, wilderness campsites). This pattern may also reflect the increased affluence of out-of-province travellers.

Fig. 9 Accommodation Stayed In While on Trips

| | Took a Pleasure Trip Outside of British Columbia | Only Took Pleasure Trips Within British Columbia | Total Pleasure Travellers in British Columbia | Index |
|--|--|---|---|-------|
| Size of Market | 2,334,739 | 327,682 | 2,662,421 | 100 |
| A Public Campground in a National, State, Provincial or Municipal Park | 31.3% | 32.7% | 31.4% | 99 |
| Seaside Resort | 29.7% | 13.2% | 27.7% | 107 |
| Lakeside / Riverside Resort | 25.8% | 7.4% | 23.6% | 110 |
| A Private Campground | 22.0% | 21.6% | 22.0% | 100 |
| Ski Resort or Mountain Resort | 20.7% | 10.7% | 19.5% | 106 |
| A Camp Site in a Wilderness Setting (Not a Campground) | 13.0% | 16.2% | 13.4% | 97 |
| A Motor Home or RV while Travelling or Touring (Not a Camping Trip) | 7.3% | 3.4% | 6.8% | 107 |
| Health Spa | 5.8% | 2.0% | 5.3% | 109 |
| Farm or Guest Ranch | 5.3% | 4.4% | 5.2% | 102 |
| Wilderness Lodge You Can Drive to by Car | 5.2% | 2.4% | 4.8% | 107 |
| Country Inn or Resort with Gourmet Restaurant | 4.8% | 3.4% | 4.6% | 104 |
| Remote or Fly-In Wilderness Lodge | 2.2% | 2.4% | 2.2% | 99 |
| On a Houseboat | 1.8% | 2.2% | 1.9% | 97 |
| Remote or Fly-In Wilderness Outpost | 1.0% | 0.3% | 0.9% | 109 |
| Wine Tasting School | 0.8% | 0.0% | 0.7% | 114 |
| Cooking School | 0.3% | 0.0% | 0.3% | 114 |

Tours and Cruises Taken During Past Two Years

British Columbia residents who took an out-of-province trip were much more likely to have taken tours and cruises during the last two years than were within-province travellers. They were especially likely to have taken organized sameday and multi-location tours, city tours and scenic countryside drives. They were also more likely to have taken self-guided sameday or multi-location tours, tours of wineries, factories and casinos and wilderness tours during the past two years. Out-of-province travellers were also more likely to have taken freshwater cruises and ocean cruises during the last two years. Those who exclusively travelled within British Columbia rarely took organized tours and primarily took self-guided tours and scenic drives in the countryside.

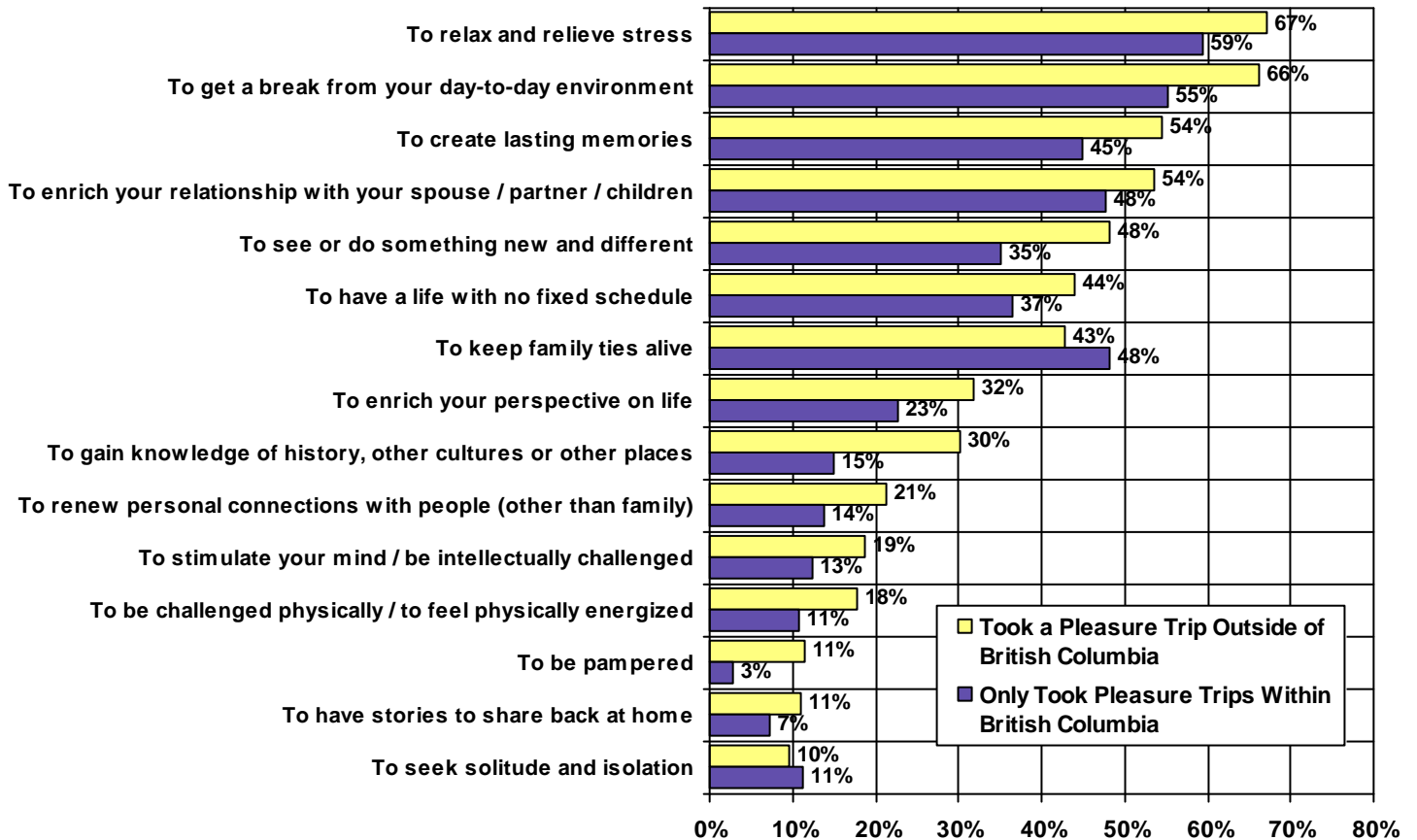
Fig. 10 Tours and Cruises Taken During Past Two Years

| | Took a Pleasure Trip Outside of British Columbia | Only Took Pleasure Trips Within British Columbia | Total Pleasure Travellers in British Columbia | Index |
|---|--|--|---|-------|
| Size of Market | 2,334,739 | 327,682 | 2,662,421 | 100 |
| A self-guided, sameday tour while on an overnight trip | 33.6% | 13.4% | 31.1% | 108 |
| Around the city | 29.3% | 7.3% | 26.6% | 110 |
| An organized, sameday guided tour while on an overnight trip | 28.1% | 3.8% | 25.1% | 112 |
| Around the countryside - scenic drives | 25.1% | 9.6% | 23.2% | 108 |
| A self-guided, overnight tour where you stayed in different locations | 21.6% | 15.9% | 20.9% | 103 |
| Some other type of tour | 16.3% | 4.5% | 14.9% | 110 |
| On the water (sightseeing cruise) | 14.1% | 3.2% | 12.8% | 111 |
| Wilderness tour | 12.6% | 7.4% | 12.0% | 105 |
| An organized, overnight guided tour where you stayed in different locations | 12.2% | 1.2% | 10.8% | 112 |
| An organized, overnight guided tour where you stayed in a single location | 9.1% | 1.8% | 8.2% | 111 |
| To a winery | 7.7% | 1.4% | 7.0% | 111 |
| Ocean cruise - Other | 6.9% | 0.8% | 6.2% | 112 |
| To a casino | 6.5% | 1.1% | 5.9% | 111 |
| Alaskan ocean cruise | 4.7% | 0.0% | 4.2% | 112 |
| To a factory | 4.1% | 0.6% | 3.7% | 112 |
| Caribbean ocean cruise | 4.0% | 0.0% | 3.6% | 113 |
| In the air as a pilot or passenger of an airplane or helicopter | 3.3% | 0.4% | 3.0% | 112 |
| Some other type of cruise | 2.4% | 0.3% | 2.1% | 112 |
| Cruise on another lake or river | 1.1% | 2.1% | 1.2% | 90 |
| Submarine cruise | 0.1% | 0.0% | 0.1% | 114 |
| Cruise on the St. Lawrence River | 0.1% | 0.0% | 0.1% | 114 |
| Great Lakes cruise | 0.1% | 0.0% | 0.1% | 109 |

Benefits Sought While on Vacation

As with most Canadian Pleasure Travellers, British Columbian Pleasure Travellers tend to take vacations to relax and relieve stress, get a break from their day-to-day environment, to create lasting memories and to enrich their relationships with family members. However, those who took trips outside of the province are more likely to prefer vacations that are both intellectually stimulating and physically challenging, offer opportunities to learn (e.g., learn about the history and culture of the destination) and novelty (i.e., to see and do something new), allow them to be pampered and allow them to renew connections with their friends. By contrast, those who travel exclusively within the province are more likely to prefer vacations that allow them to keep family ties alive.

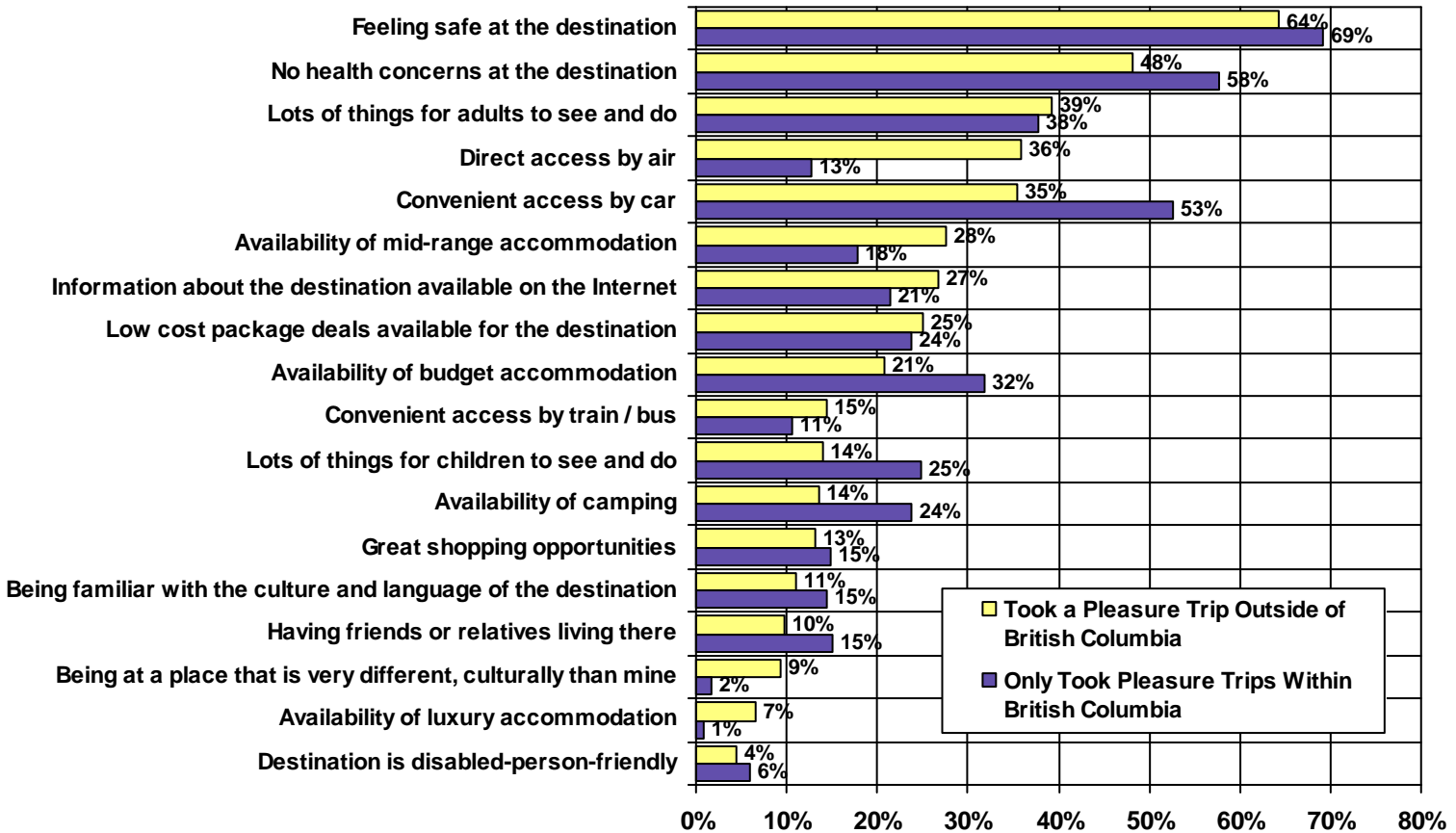
Fig.11 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travellers, British Columbian Pleasure Travellers consider it important that they feel safe at a destination. However, those who took trips outside of the province are more likely to value destinations that are culturally distinctive, directly accessible by air train or bus, offer either luxury or mid-range priced accommodation and provide information on the Internet. By contrast, those who only took trips within British Columbia consider it more important that a destination is conveniently accessible by car, has a familiar culture and language, has lots of activities for children and either budget priced accommodation or camping available. Within-province travellers are also more likely to look for destinations that have family or friends living nearby.

Fig. 12 Importance of Destination Attributes (% Rating Each Attribute as “Highly Important”)



How Destinations Are Selected

Out-of-province travellers are more likely to begin planning vacations with a particular destination in mind than are those who only travel within the province. In contrast, within-province travellers are more likely to plan a vacation by considering what activities they would like to do. This may reflect the fact that within-province travellers are more likely to visit the same destinations on repeated occasions than do out-of-province travellers.

Fig. 13 How Destinations Are Selected (Summer and Winter Vacations)

| | Took a Pleasure Trip Outside of British Columbia | Only Took Pleasure Trips Within British Columbia | Total Pleasure Travellers in British Columbia | Index |
|--|--|--|---|-------|
| Size of Market | 2,334,739 | 327,682 | 2,662,421 | 100 |
| Summer | | | | |
| Started with a desired destination in mind | 54.8% | 45.2% | 53.7% | 102 |
| Started by considering specific activities wanted to do | 9.5% | 15.4% | 10.2% | 93 |
| Started with a certain type of vacation experience in mind | 24.1% | 25.7% | 24.3% | 99 |
| Looked for packaged deals - no destination in mind | 0.6% | 0.8% | 0.7% | 97 |
| Considered something else first | 5.7% | 1.1% | 5.2% | 110 |
| Don't know / Other | 5.3% | 11.8% | 6.0% | 87 |
| Winter | | | | |
| Started with a desired destination in mind | 53.3% | 38.3% | 52.1% | 102 |
| Started by considering specific activities wanted to do | 13.0% | 24.9% | 14.0% | 93 |
| Started with a certain type of vacation experience in mind | 22.4% | 28.6% | 22.9% | 98 |
| Looked for packaged deals - no destination in mind | 2.1% | 0.9% | 2.0% | 105 |
| Considered something else first | 3.9% | 4.3% | 3.9% | 99 |
| Don't know / Other | 5.3% | 3.0% | 5.1% | 104 |

Trip Planning and Information Sources Consulted

Out-of-province travellers are more likely than within-province travellers to be solely or partially responsible for planning their trips (62.2% versus 52.1%). They also tend to consult a wider range of travel information. Most out-of-province travellers use the Internet, word-of-mouth and past experience to plan their trips. However, relative to within-province travellers, those who travelled outside of the province are also much more likely to obtain travel information from the Internet, travel agents, travel guide books such as Fodor's, auto clubs, the official government tourism guides, maps, newspaper or magazine articles and advertising, television programs, direct mail, email newsletters and trade, travel or sports shows. On the other hand, within-province travellers are more likely to obtain travel information from television advertising.

Fig. 14 Who Plans Vacations and Information Sources Consulted

| | | Took a Pleasure Trip Outside of British Columbia | Only Took Pleasure Trips Within British Columbia | Total Pleasure Travellers in British Columbia | Index |
|---|--|--|--|---|-------|
| Size of Market | | 2,334,739 | 327,682 | 2,662,421 | 100 |
| Who Plans Trips? | Respondent plans trips | 44.1% | 39.0% | 43.5% | 101 |
| | Trip planning a shared responsibility | 18.1% | 13.1% | 17.6% | 103 |
| | Someone else plans trips | 37.7% | 47.9% | 38.9% | 97 |
| Information Sources Consulted | An Internet website | 73.6% | 44.6% | 70.3% | 105 |
| | Advice of others / Word-of-mouth | 54.8% | 41.0% | 53.2% | 103 |
| | Past experience / Been there before | 54.3% | 40.6% | 52.7% | 103 |
| | A travel agent | 43.9% | 3.4% | 39.2% | 112 |
| | Maps | 39.5% | 27.7% | 38.1% | 104 |
| | Official travel guides or brochures from state / province | 24.5% | 16.1% | 23.5% | 104 |
| | Visitor information centres | 23.8% | 20.8% | 23.5% | 102 |
| | Articles in newspapers / magazines | 22.5% | 9.7% | 21.0% | 107 |
| | An auto club such as CAA | 20.5% | 4.6% | 18.6% | 110 |
| | Travel guide books such as Fodor's | 19.4% | 2.1% | 17.4% | 112 |
| | Advertisements in newspapers / magazines | 14.0% | 5.3% | 13.0% | 108 |
| | Programs on television | 10.7% | 5.5% | 10.1% | 106 |
| | Travel information received in the mail | 5.8% | 2.8% | 5.4% | 106 |
| | An electronic newsletter or magazine received by e-mail | 4.9% | 0.9% | 4.5% | 111 |
| | Advertisements on television | 4.3% | 7.2% | 4.6% | 93 |
| Visits to trade, travel or sports shows | 2.2% | 1.1% | 2.0% | 106 | |

Use of the Internet to Plan and Arrange Trips

British Columbia residents who took a trip outside of the province are much more likely to have used the Internet to plan (69.5%) and book travel (51.5%) than those who did not take a trip outside of the province (39.0% plan, 16.9% book). The difference between those travelling and those not travelling outside the province is especially reflected in their respective use of airline websites (62.2% versus 7.7%) and travel planning or booking websites (52.0% versus 8.4%). Out-of-province travellers are also much more likely to use hotel or resort websites and cruise line websites. As with most Canadian Pleasure Travellers, British Columbians most often booked airline tickets and accommodation online. However, out-of-province travellers are also more likely to arrange car rentals and to buy travel packages online. On the other hand, those who travelled exclusively within the province are more likely to consult and purchase tickets from the websites of specific attractions.

Fig. 15 Use of the Internet to Plan and Book Travel

| | | Took a Pleasure Trip Outside of British Columbia | Only Took Pleasure Trips Within British Columbia | Total Pleasure Travellers in British Columbia | Index |
|---|--|--|--|---|-------|
| Size of Market | | 2,334,739 | 327,682 | 2,662,421 | 100 |
| Percent Using Internet to Plan or Book Travel | Does not use the Internet | 30.4% | 61.0% | 34.2% | 89 |
| | Uses Internet to plan trips only | 18.0% | 22.1% | 18.5% | 97 |
| | Uses Internet to book part of trip | 51.5% | 16.9% | 47.3% | 109 |
| Types of Websites Consulted | An airline website | 62.2% | 7.7% | 58.2% | 107 |
| | A website of a hotel or resort | 61.3% | 29.8% | 59.0% | 104 |
| | A travel planning / booking website | 52.0% | 8.4% | 48.8% | 107 |
| | A tourism website of a country/region/city | 45.8% | 43.2% | 45.6% | 100 |
| | A website of an attraction | 31.6% | 40.9% | 32.3% | 98 |
| | Some other website | 26.0% | 43.9% | 27.3% | 95 |
| | A cruise line website | 8.8% | 0.8% | 8.2% | 107 |
| | A motorcoach website | 2.3% | 1.5% | 2.2% | 103 |
| Parts of Trips Booked Over The Internet | Air tickets | 80.9% | 9.9% | 77.8% | 104 |
| | Accommodation | 67.2% | 46.4% | 66.3% | 101 |
| | Car rental | 29.7% | 3.0% | 28.5% | 104 |
| | Tickets or fees for specific activities or attractions | 23.2% | 44.8% | 24.2% | 96 |
| | Tickets for rail, bus or boat / ship fares | 16.5% | 12.6% | 16.3% | 101 |
| | A package containing two or more items | 14.0% | 4.6% | 13.6% | 103 |
| | Other | 4.5% | 11.0% | 4.8% | 94 |

Media Consumption Habits

Out-of-province travellers are much more likely to use travel media (e.g., travel sections of newspapers, travel websites) than within-province travellers. Out-of-province travellers may also be effectively targeted through cuisine-related media (e.g., food & cooking magazines, cooking shows), sports media, city lifestyle magazines, business, finance and investing magazines and soft rock radio stations. Within-province travellers may be best reached through home-oriented magazines (e.g., home and garden), daytime soap operas and both alternative rock music and country music radio stations.

Fig. 16 Media Consumption Habits

| | | Took a Pleasure Trip Outside of British Columbia | Only Took Pleasure Trips Within British Columbia | Total Pleasure Travellers in British Columbia | Index |
|---|--|--|--|---|-------|
| Size of Market | | 2,334,739 | 327,682 | 2,662,421 | 100 |
| Newspaper Readership | Reads daily newspaper | 89.7% | 92.0% | 90.0% | 100 |
| | Reads weekend edition of newspaper | 89.5% | 90.8% | 89.7% | 100 |
| | Reads local neighbourhood or community newspapers | 73.9% | 76.8% | 74.3% | 100 |
| | Reads other types of newspapers | 19.7% | 24.9% | 20.4% | 97 |
| | Frequently or occasionally reads travel section of daily newspaper | 52.9% | 34.1% | 50.6% | 105 |
| | Frequently or occasionally reads travel section of weekend newspaper | 52.4% | 29.5% | 49.6% | 106 |
| Types of Magazines Read (Top 5 Indexed) | Magazines about your city | 16.9% | 5.5% | 15.5% | 109 |
| | Travel (e.g., Condé Nast) | 11.7% | 4.0% | 10.7% | 109 |
| | Business, finance and investing | 18.3% | 6.9% | 16.9% | 108 |
| | Food and cooking | 29.5% | 19.4% | 28.3% | 104 |
| | News magazine | 25.2% | 20.2% | 24.6% | 103 |
| Type of Television Programs Watched (Top 5 Indexed) | Travel shows | 37.2% | 27.0% | 35.9% | 103 |
| | Biography | 40.9% | 34.0% | 40.1% | 102 |
| | Dramas (e.g., Law & Order) | 59.8% | 52.4% | 58.9% | 102 |
| | Cooking shows | 33.3% | 30.4% | 33.0% | 101 |
| | Late night talk shows | 17.7% | 17.2% | 17.6% | 100 |
| Type of Radio Programs Listened To (Top 5 Indexed) | All sports | 11.2% | 6.2% | 10.6% | 106 |
| | Soft music / Adult contemporary | 30.0% | 18.7% | 28.6% | 105 |
| | Multicultural | 8.5% | 5.9% | 8.2% | 104 |
| | News / Talk / Information | 43.8% | 36.7% | 42.9% | 102 |
| | Jazz / Big band | 8.4% | 7.5% | 8.3% | 101 |
| Types of Websites Visited (Top 5 Indexed) | Sports | 28.0% | 13.7% | 26.5% | 106 |
| | Travel | 54.8% | 28.8% | 52.0% | 105 |
| | Entertainment | 48.6% | 31.9% | 46.8% | 104 |
| | Newspaper sites | 27.4% | 20.2% | 26.6% | 103 |
| | Network news sites (e.g., CBC, CNN) | 41.6% | 33.7% | 40.8% | 102 |

Appendix One:
Canadian TAMS 2006 Culture and Entertainment Segmentation

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

Appendix Two: Canadian TAMS 2006 Outdoor Activity Segmentation

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