

U.S. TRAVEL MARKET

U.S. Travellers to British Columbia

A Profile Report

January 30, 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



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 U.S. database is used in this current report. This survey was conducted by mail with an established U.S. mail panel. 60,649 completed questionnaires were returned. The mail panel response rate for this survey was 71.3%. The data have been weighted to project the results to the United States population.

This report profiles those who took a trip to British Columbia in the past two years and compares them with other U.S. Pleasure Travellers (i.e., took at least one pleasure trip in the last two years). This report is part of a series of eight reports reviewing U.S. travellers to specific destinations within Canada prepared using the U.S. TAMS

U.S. Travellers to British Columbia

Market Incidence

Over the last two years, 3.2% of adult Americans (7,025,878) took an overnight pleasure trip to British Columbia. This represents 4.1% of U.S. Pleasure Travellers. 20.7% of U.S. Pleasure Travellers who visited British Columbia reported taking two or more pleasure trips to this province in the last two years. British Columbia was the second most frequently visited Canadian destination (behind Ontario) by U.S. Pleasure Travellers during the past two years.

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

	British Columbia
Number of Americans Taking a Trip ²	7,025,878
Percent of U.S. Pleasure Travellers ³	4.1%
Percent of U.S. Population ⁴	3.2%
Percent of Visitors Taking Two or More Pleasure Trips ⁵	20.7%

- 1 - "Trips" are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.
- 2 - Defined as individuals who took at least one overnight trip to British Columbia in the last two years for any purpose.
- 3 - "Pleasure Travellers" are defined as individuals who have taken at least one out-of-town pleasure trip of one or more nights in the last two years. This row reports the percent of U.S. Pleasure Travellers who took a trip to British Columbia.
- 4 - This row reports the percent of the Total U.S. Adult Market who took a trip to British Columbia during the past two years.
- 5 - This row reports the percent of U.S. Pleasure Travellers who visited British Columbia who took two or more pleasure trips to British Columbia during the last two years.

Incidence by Region, State and Population Size

Relative to the average U.S. Pleasure Traveller, those who took a trip to British Columbia are over-represented among those living in the Alaska and the Pacific region of the United States. They are more likely to live in major urban areas (population of 2 million or more) than in mid-sized cities or smaller communities.

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

	Total Population	Estimated Number Who Took a Trip to British Columbia	Percent of Pleasure Travellers in Region Who Took a Trip to British Columbia	Percent of Total Regional Population Who Took a Trip to British Columbia
United States	222,846,268	7,025,878	4.1%	3.2%
New England	11,095,629	221,148	2.6%	2.0%
Middle Atlantic	31,005,526	398,727	1.7%	1.3%
East North Central	34,621,254	632,835	2.4%	1.8%
West North Central	15,024,360	391,915	3.3%	2.6%
South Atlantic	42,602,998	832,404	2.6%	2.0%
East South Central	13,597,436	159,475	1.7%	1.2%
West South Central	24,853,901	460,898	2.5%	1.9%
Mountain	15,030,720	571,643	4.7%	3.8%
Pacific	34,529,689	3,248,538	11.6%	9.5%
Alaska	484,754	108,294	25.6%	22.5%
Not Available	745,757	122,804	19.8%	16.6%
Less than 100,000	29,429,442	535,203	2.6%	1.8%
100,000 to 499,999	36,551,501	1,061,604	3.9%	2.9%
500,000 to 1,999,999	52,335,815	1,046,263	2.6%	2.0%
2,000,000 or more	103,783,753	4,260,004	5.2%	4.1%

Those who visited British Columbia are most likely to live in neighbouring Washington State and Alaska. There is also an above-average rate of visits among residents of Oregon, Montana, Idaho and California, and, rather interestingly, Delaware and the District of Columbia. As would be expected, the likelihood of a visit to British Columbia generally declines as the distance of the state from British Columbia increases (see Fig. 3 on next page).

Fig. 3 Those Who Took a Trip to British Columbia by U.S. State

Region	State	Population of State	Estimated Number Taking Trip to British Columbia	Percent of Pleasure Travellers in State	Percent of State Population
United States	All States	222,846,268	7,025,878	4.1%	3.2%
New England	Connecticut	2,685,692	75,844	3.7%	2.8%
	Maine	1,047,770	18,852	2.6%	1.8%
	Massachusetts	4,423,562	84,609	2.4%	1.9%
	New Hampshire	1,604,344	12,347	1.0%	0.8%
	Rhode Island	837,445	19,536	2.8%	2.3%
	Vermont	496,816	9,960	2.6%	2.0%
Middle Atlantic	New Jersey	6,708,501	113,215	2.2%	1.7%
	New York	14,727,054	194,750	1.8%	1.3%
	Pennsylvania	9,569,972	90,762	1.3%	0.9%
East North Central	Illinois	9,521,097	200,284	2.7%	2.1%
	Indiana	4,717,624	90,753	2.5%	1.9%
	Michigan	7,709,890	128,959	2.2%	1.7%
	Ohio	8,412,962	154,510	2.5%	1.8%
	Wisconsin	4,259,682	58,329	1.7%	1.4%
West North Central	Iowa	2,262,393	53,835	3.0%	2.4%
	Kansas	2,304,474	52,298	3.0%	2.3%
	Minnesota	3,946,220	136,207	4.0%	3.5%
	Missouri	4,138,758	98,452	3.1%	2.4%
	Nebraska	1,304,361	27,591	2.6%	2.1%
	North Dakota	488,140	7,962	1.9%	1.6%
	South Dakota	580,015	15,570	3.5%	2.7%
South Atlantic	Delaware	646,427	31,952	6.5%	4.9%
	District of Columbia	521,285	30,436	8.8%	5.8%
	Florida	13,937,467	347,219	3.2%	2.5%
	Georgia	6,668,302	120,719	2.4%	1.8%
	Maryland	3,428,206	71,985	2.7%	2.1%
	North Carolina	6,651,453	59,036	1.2%	0.9%
	South Carolina	3,241,944	42,499	1.8%	1.3%
	Virginia	5,957,159	120,426	2.6%	2.0%
	West Virginia	1,550,755	8,134	0.9%	0.5%
East South Central	Alabama	3,431,591	51,035	2.1%	1.5%
	Kentucky	3,447,277	27,254	1.1%	0.8%
	Mississippi	2,156,793	15,041	1.1%	0.7%
	Tennessee	4,561,775	66,146	2.0%	1.5%
West South Central	Arkansas	2,103,346	17,517	1.2%	0.8%
	Louisiana	3,367,908	71,216	3.2%	2.1%
	Oklahoma	2,643,565	21,934	1.2%	0.8%
	Texas	16,739,082	350,231	2.8%	2.1%
Mountain	Arizona	4,451,660	152,105	4.3%	3.4%
	Colorado	3,501,822	119,569	4.1%	3.4%
	Idaho	1,044,920	61,863	7.5%	5.9%
	Montana	726,027	47,863	8.0%	6.6%
	Nevada	1,809,582	74,282	5.1%	4.1%
	New Mexico	1,433,596	27,402	2.5%	1.9%
	Utah	1,671,322	71,109	5.1%	4.3%
	Wyoming	391,790	17,449	5.2%	4.5%
Pacific	Alaska	484,754	108,294	25.6%	22.5%
	California	26,965,837	1,599,316	7.3%	5.9%
	Oregon	2,793,303	349,331	16.2%	12.6%
	Washington	4,770,549	1,299,890	34.0%	27.5%

Demographic Profile

U.S. Pleasure Travellers who visited British Columbia are slightly more likely to be male, predominantly married (73.2%) and over-represented among those 45 years of age or older (64.9%) without dependent children 18 or younger living at home. They are also more likely than average to have post-graduate degrees (31.6%) and report household incomes that are well-above average (\$96,783). As such, British Columbia visitors tend to be over-represented among affluent, mature couples.

Fig. 4 Demographic Profile of Visitors to British Columbia Relative to All U.S. Pleasure Travellers

		Took a Trip to BC	Did Not Take a Trip to BC ¹	Pleasure Travellers	Index ²
Attribute	Size of Market	7,025,878	163,484,363	170,510,241	100
Gender	Male	52.2%	48.4%	48.5%	108
	Female	47.8%	51.6%	51.5%	93
Age of Respondent	18 to 24	6.2%	11.0%	10.8%	57
	25 to 34	15.4%	21.2%	21.0%	73
	35 to 44	13.6%	17.4%	17.3%	79
	45 to 54	21.9%	21.0%	21.0%	104
	55 to 64	19.7%	15.3%	15.5%	127
	65 Plus	23.3%	14.0%	14.4%	161
Average Age		50.7	45.2	45.4	N/A
Marital Status	Not married	24.1%	30.8%	30.5%	79
	Married	75.9%	69.2%	69.5%	109
Parental Status	No children under 18	80.6%	69.6%	70.0%	115
	Children under 18	19.4%	30.4%	30.0%	65
Education	High school or less	9.7%	21.0%	20.5%	47
	Trade, Technical, Community Col.	16.6%	21.6%	21.4%	78
	University Degree	42.1%	41.0%	41.1%	102
	Post Graduate Degree	31.6%	16.5%	17.1%	185
Household Income	Under \$20,000	3.8%	8.3%	8.1%	47
	\$20,000 to \$39,999	9.2%	16.5%	16.2%	57
	\$40,000 to \$59,999	13.6%	16.8%	16.7%	81
	\$60,000 to \$79,999	14.4%	14.7%	14.7%	98
	\$80,000 to \$99,999	13.0%	11.5%	11.6%	112
	\$100,000 to \$149,999	19.6%	14.1%	14.4%	136
	\$150,000 or more	14.9%	6.3%	6.7%	223
Not stated	11.6%	11.7%	11.7%	99	
Average Household Income		\$96,783	\$73,336	\$74,303	N/A

- 1 - "Did Not Take a Trip to British Columbia" is defined as an individual who took at least one out-of-town, overnight pleasure trip of one or more nights in the last two years but did not go to BC on any trip.
- 2 - The "Index" is calculated by dividing the percent for those who visited British Columbia in each group by the percent of U.S. Pleasure Travellers in each group. The Index indicates the extent to which visitors are over or under-represented relative to the average U.S. Pleasure Traveller. An index of 100 means the percent of visitors is the same as that of the average U.S. Pleasure Traveller. Index values over 100 indicate that visitors are over-represented relative to the average U.S. Pleasure Traveller. Index values less than 100 indicate that visitors are under-represented relative to the average U.S. Pleasure Traveller.

Travel Activity (During Last Two Years)

Those who visited British Columbia during the last two years are frequent travellers with 66.3% taking five or more pleasure trips in the last two years. (Note: 42.4% of U.S. Pleasure Travellers took five or more pleasure trips in the last two years). As such, they were more likely than the average U.S. Pleasure Traveller to have taken trips within their home state and to other parts of the United States, and twice as likely as the average U.S. Pleasure Traveller to have travelled to Mexico, the Caribbean and overseas destinations.

Americans who visited British Columbia also frequently travelled to other parts of Canada. Relative to the average U.S. Pleasure Traveller, they were especially likely to have also visited Saskatchewan, Alberta, the Yukon and the Northwest Territories during the last two years.

Fig. 5 Percent Travelling to Canada and Other Destinations during Past Two Years

	Took a Trip to British Columbia	Did Not Take a Trip to British Columbia	Pleasure Travellers	Index
Size of Market	7,025,878	163,484,363	170,510,241	100
All destinations	100.0%	84.8%	85.4%	117
Canada	100.0%	10.9%	14.6%	687
Newfoundland & Labrador	3.1%	0.3%	0.4%	754
Prince Edward Island	4.7%	0.4%	0.6%	773
New Brunswick	4.6%	0.6%	0.8%	570
Nova Scotia	6.3%	1.1%	1.3%	470
Quebec	11.3%	2.7%	3.1%	365
Ontario	19.1%	7.8%	8.3%	231
Manitoba	4.7%	0.3%	0.5%	892
Saskatchewan	6.8%	0.2%	0.5%	1408
Alberta	17.5%	0.5%	1.2%	1462
British Columbia	100.0%	0.0%	4.1%	2423
Yukon	10.5%	0.1%	0.6%	1852
Northwest Territories	5.9%	0.2%	0.4%	1484
Nunavut	0.3%	LT 0.1%	LT 0.1%	632
Own State	87.5%	79.4%	79.7%	110
Other parts of the U.S.	97.5%	90.3%	90.6%	108
Mexico	30.4%	12.9%	13.6%	224
Caribbean	25.6%	12.2%	12.7%	201
All other destinations	23.1%	9.0%	9.6%	242

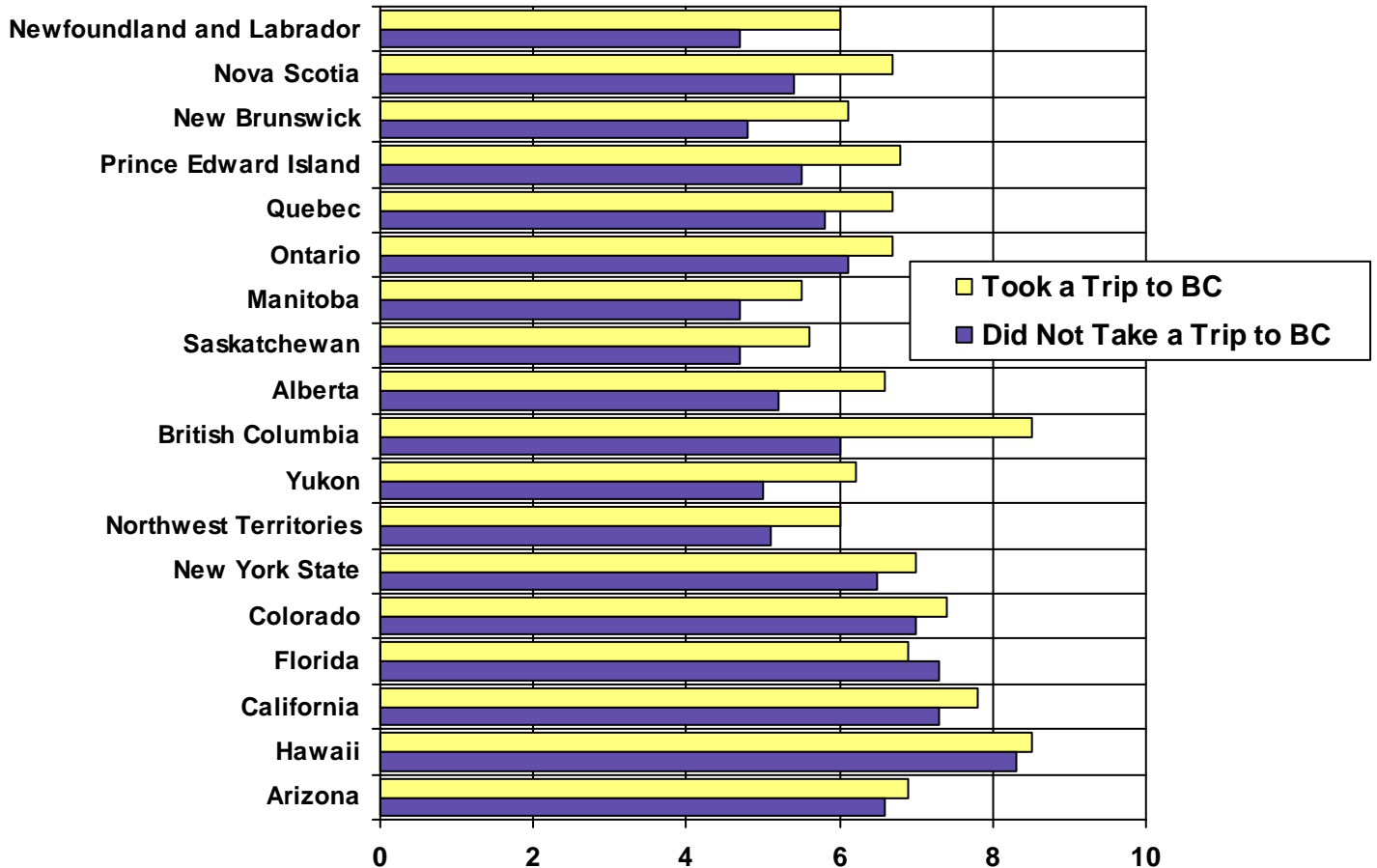
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Travellers who visited British Columbia have a much more favourable impression of all Canadian destinations than does the average U.S. Pleasure Traveller. Along with Hawaii, British Columbia (8.5) received the highest rating of all destinations. Prince Edward Island (6.8), Nova Scotia (6.7), Quebec (6.7) and Ontario (6.7) are also considered appealing destinations by this travel segment.

The U.S. reference states were also perceived as more appealing destinations by those who visited British Columbia (relative to those who did not visit) and especially New York State, Colorado and California.

Fig. 6 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 Not on Trips

U.S. Pleasure Travellers who visited British Columbia are also very active in cultural pursuits while NOT travelling. The majority dine in local restaurants, attend local festivals or fairs and visit local historic sites, heritage buildings and museums when not on trips. Relative to the average U.S. Pleasure Traveller, they were also much more likely to attend local live art performances (e.g., the opera, ballet, classical music concerts), to visit art galleries and art shows and to go to botanical gardens. On the other hand, reflecting the age of these travellers, they are less likely to go to amusement or theme parks, to bars with rock music or to rock concerts.

Fig. 8 Culture and Entertainment Activities Pursued While Not on Trips

	Took a Trip to British Columbia	Did Not Take a Trip to British Columbia	Pleasure Travellers	Index
Size of Market	7,025,878	163,484,363	170,510,241	100
Going out to eat in restaurants	95.3%	92.7%	92.8%	103
Going to festivals or fairs	69.7%	65.3%	65.5%	106
Going to historic sites or heritage buildings	54.9%	39.5%	40.1%	137
Going to museums	53.8%	36.8%	37.5%	143
Going to zoos or aquariums	49.4%	45.5%	45.6%	108
Going to art galleries or art shows	46.0%	27.0%	27.8%	166
Going to live theatre	45.1%	28.5%	29.2%	155
Going to amateur sporting events	44.1%	39.7%	39.9%	111
Going to professional sporting events	40.5%	34.6%	34.9%	116
Going to pick-your-own farms or farmers' market	38.6%	31.3%	31.6%	122
Going to botanical gardens	33.3%	19.4%	20.0%	167
Going to gamble in casinos	31.9%	27.8%	28.0%	114
Going to amusement or theme parks	31.0%	38.4%	38.1%	81
Going to classical music concerts	27.4%	14.4%	14.9%	184
Going to bars with live pop or rock bands	22.4%	23.6%	23.6%	95
Going dancing	21.5%	20.8%	20.8%	103
Going to rock music concerts	20.3%	21.3%	21.3%	95
Going to the ballet	14.5%	6.7%	7.0%	207
Going to day spas	13.6%	10.1%	10.3%	132
Going to the opera	13.6%	5.4%	5.7%	237
Staying overnight in a hotel or B&B in your own city	12.8%	10.5%	10.6%	122
Going to jazz clubs	11.7%	7.8%	7.9%	147
Going to rodeos	10.0%	8.1%	8.2%	122

Outdoor Activities Pursued While on Trips

Those who visited British Columbia were highly active in outdoor activities while on trips during the past two years. Relative to the average U.S. Pleasure Traveller, they were especially likely to have gone skiing (e.g., cross-country skiing, downhill skiing) and golfing and to have participated in fitness activities (e.g., cycling, exercising and jogging) as well as resort-based, water activities (e.g., scuba diving and snorkeling, sailing and surfing) while on trips. They were also especially likely to have participated in nature-oriented activities (e.g., wildlife viewing, horseback riding, hiking, climbing and paddling) while on trips during the past two years.

Fig. 9 Outdoor Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Outdoor Activity)

	Took a Trip to British Columbia	Did Not Take a Trip to British Columbia	Pleasure Travellers	Index
Size of Market	7,025,878	163,484,363	170,510,241	100
Wildlife Viewing	63.4%	33.7%	34.9%	182
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	48.0%	39.2%	39.6%	121
Hiking, Climbing & Paddling	42.0%	22.7%	23.5%	179
Boating & Swimming (e.g., motorboating, swimming in lakes)	27.1%	20.8%	21.0%	129
Games & Individual Sports (e.g., tennis, board games)	25.9%	22.1%	22.2%	116
Exercising & Jogging	24.8%	13.6%	14.1%	176
Fishing	22.5%	18.7%	18.8%	120
Golfing	18.3%	10.3%	10.7%	171
Downhill Skiing & Snowboarding	17.0%	7.7%	8.0%	211
Cycling	14.0%	6.0%	6.3%	221
Snowmobiling & ATVing	12.0%	6.9%	7.1%	169
Horseback Riding	11.2%	5.9%	6.2%	181
Team Sports (e.g., football, baseball, basketball)	10.0%	7.8%	7.9%	126
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	9.7%	4.5%	4.8%	205
Scuba & Snorkeling	9.0%	3.9%	4.1%	220
Cross-country Skiing & Snowshoeing	6.8%	1.7%	1.9%	366
Board & Blade (e.g., skateboarding, ice-skating)	6.8%	3.9%	4.0%	170
Hunting	6.0%	5.4%	5.4%	112
Extreme Air Sports (e.g., parachuting, bungee jumping)	4.3%	1.6%	1.7%	249
Motorcycling	4.2%	3.0%	3.1%	136
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	1.6%	0.3%	0.3%	486

Outdoor Activities Pursued While Not on Trips

When NOT travelling, those who visited British Columbia continue to pursue a wide variety of outdoor activities. The majority go on day outings to local parks and picnics, exercise, garden and swim while not travelling. Relative to the average U.S. Pleasure Traveller, they are especially likely to go skiing (e.g., downhill skiing, cross-country skiing, snowboarding) and participate in fitness activities (e.g., exercise and jogging, cycling, golfing) as well as nature-oriented activities (e.g., hiking, canoeing or kayaking, horseback riding). However, reflecting the age of these travellers, they are less likely than others to play team sports or to rollerblade, skateboard or go ice-skating.

Fig. 10 Outdoor Activities Pursued While NOT on Trips

	Took a Trip to British Columbia	Did Not Take a Trip to British Columbia	Pleasure Travellers	Index
Size of Market	7,025,878	163,484,363	170,510,241	100
Day outing to a park	66.3%	63.0%	63.1%	105
Exercising at home or at a fitness club	64.2%	55.7%	56.0%	115
Gardening	62.1%	52.7%	53.1%	117
Swimming	54.0%	56.6%	56.5%	96
Picnicking	51.7%	47.6%	47.7%	108
Hiking	47.3%	31.9%	32.5%	146
Camping	31.2%	26.5%	26.7%	117
Cycling	31.1%	22.5%	22.9%	136
Fishing	27.2%	33.0%	32.8%	83
Sailing or other boating	23.1%	19.8%	20.0%	116
Golfing	22.8%	18.1%	18.3%	125
Jogging	21.3%	19.4%	19.5%	109
Playing racquet sports (e.g., tennis or badminton)	15.3%	13.1%	13.2%	116
Playing team sports	14.1%	15.9%	15.8%	89
Downhill skiing	12.7%	5.4%	5.7%	222
Canoeing or kayaking	12.4%	7.7%	7.8%	157
Riding an all-terrain vehicle (ATV)	9.8%	11.6%	11.5%	86
Hunting	9.7%	11.9%	11.8%	82
Horseback riding	9.3%	8.6%	8.6%	108
Cross-country skiing	6.4%	2.3%	2.5%	254
Rollerblading	5.1%	7.4%	7.3%	69
Ice-skating	4.9%	5.5%	5.5%	90
Snowboarding	4.4%	2.6%	2.7%	164
Snowmobiling	3.7%	3.3%	3.3%	111
Skateboarding	1.9%	2.2%	2.2%	89

Accommodation Stayed In While on Trips

Those who visited British Columbia were most likely to have stayed in resorts (e.g., seaside resorts, lakeside resorts, riverside resorts, ski or mountain resorts) and public and private campgrounds during the last two years. However, relative to the average U.S. Pleasure Traveller, British Columbia visitors were especially likely to have stayed at a ski or mountain resort and a remote lodge or outpost in a wilderness area. They are also more likely to have toured using a motor home or RV and to have stayed at accommodation specializing in fine cuisine (e.g., country inn or resort with gourmet restaurant, cooking school) during the past two years.

Fig. 11 Accommodation Stayed In While on Trips

	Took a Trip to British Columbia	Did Not Take a Trip to British Columbia	Pleasure Travellers	Index
Size of Market	7,025,878	163,484,363	170,510,241	100
Seaside Resort	32.5%	17.7%	18.3%	177
A Public Campground in a National, State, Provincial or Municipal Park	25.3%	16.6%	16.9%	150
Lakeside / Riverside Resort	23.9%	12.0%	12.4%	192
Ski Resort or Mountain Resort	23.0%	8.4%	9.0%	256
A Private Campground	14.4%	10.0%	10.2%	141
A Motor Home or RV while Travelling or Touring (Not a Camping Trip)	9.3%	4.0%	4.2%	219
A Camp Site in a Wilderness Setting (Not a Campground)	8.7%	4.5%	4.7%	185
Wilderness Lodge You Can Drive to by Car	8.4%	3.3%	3.5%	242
Health Spa	6.9%	3.0%	3.1%	220
Country Inn or Resort with Gourmet Restaurant	4.5%	1.9%	2.0%	225
Farm or Guest Ranch	3.2%	1.9%	2.0%	161
Remote or Fly-In Wilderness Lodge	3.1%	0.7%	0.8%	371
On a Houseboat	2.8%	1.4%	1.4%	193
Cooking School	2.4%	0.5%	0.6%	420
Remote or Fly-In Wilderness Outpost	1.7%	0.4%	0.4%	383
Wine Tasting School	1.3%	0.4%	0.4%	309

Tours and Cruises Taken During Past Two Years

Those who visited British Columbia were much more likely than the average U.S. Pleasure Traveller to have taken all types of tours and cruises during the last two years. Sameday tours (both organized and self-guided), city tours and scenic countryside drives were the most popular tour types taken by this segment. However, relative to the average U.S. Pleasure Traveller, those who visited British Columbia were especially likely to have taken Alaskan cruises, organized, multi-location, guided tours and tours of a winery tour or a factory in the past two years. They were also at least three times more likely than average to take a freshwater sightseeing cruise (e.g., St. Lawrence River cruise) and a wilderness tour during the last two years. Tours and cruises may be an especially effective way to promote British Columbia to the U.S. Pleasure Travel market.

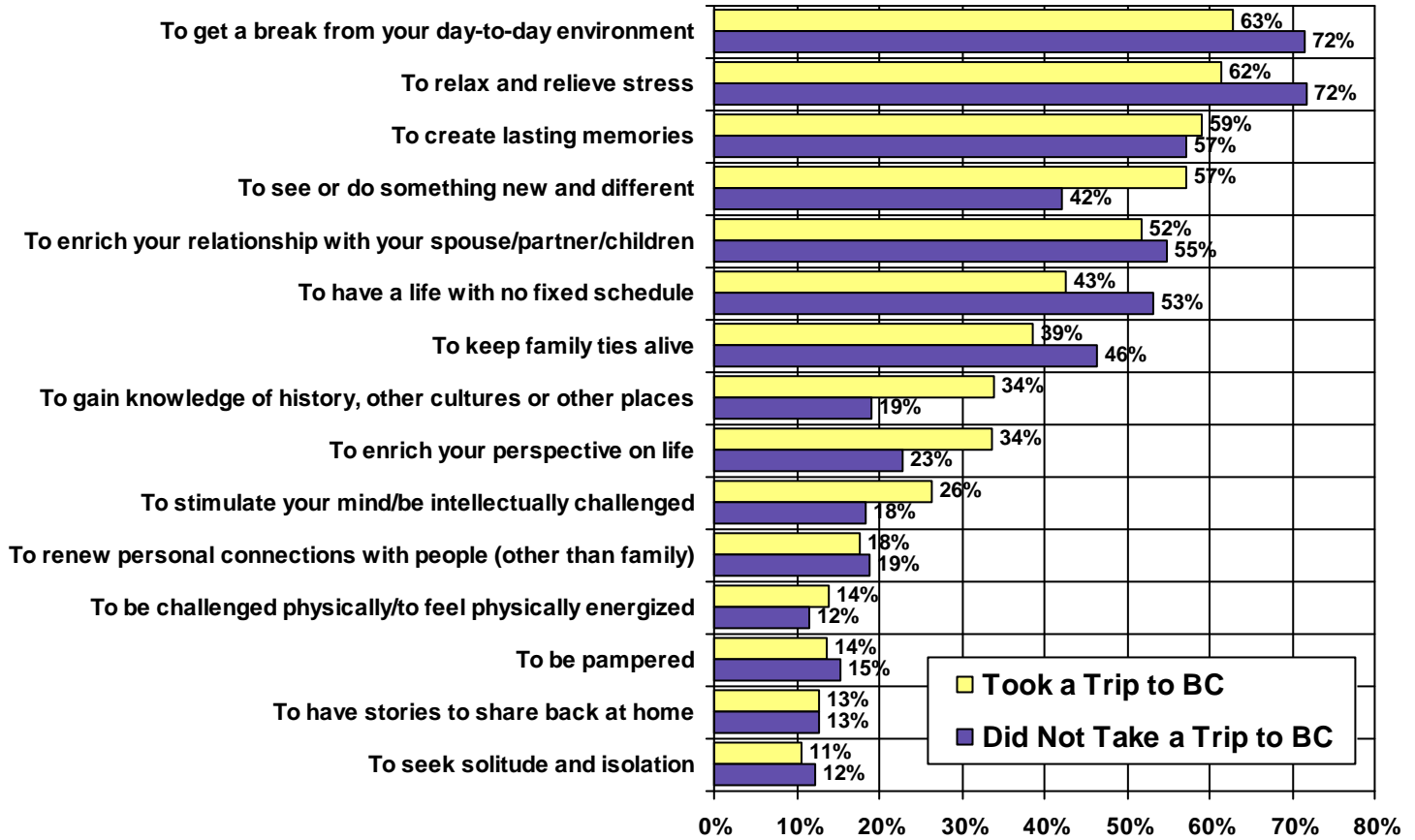
Fig. 12 Tours and Cruises Taken During Past Two Years

	Took a Trip to BC	Did Not Take a Trip to BC	Pleasure Travellers	Index
Size of Market	7,025,878	163,484,363	170,510,241	100
An organized, sameday, guided tour while on an overnight trip	40.6%	17.6%	18.5%	219
Around the city	35.6%	14.9%	15.8%	225
A self-guided, sameday tour while on an overnight trip	34.8%	18.5%	19.2%	181
Around the country side - scenic drives	30.6%	12.4%	13.1%	234
Alaskan ocean cruise	29.7%	1.3%	2.5%	1191
An organized, overnight, guided tour where you stayed in different locations	24.4%	7.2%	7.9%	310
A self-guided, overnight tour where you stayed in different locations	23.8%	9.8%	10.4%	229
On the water (sightseeing cruise)	23.5%	7.1%	7.8%	303
Wilderness tour	22.4%	6.8%	7.4%	301
Caribbean ocean cruise	17.5%	8.6%	9.0%	195
Some other type of tour	15.8%	8.5%	8.8%	179
An organized, overnight, guided tour where you stayed in a single location	15.1%	6.4%	6.7%	224
Ocean cruise - Other	14.5%	4.4%	4.8%	302
To a winery	10.6%	3.3%	3.6%	297
To a casino	9.8%	4.7%	4.9%	200
In the air as a pilot or passenger of an airplane or helicopter	7.3%	1.2%	1.4%	517
To a factory	5.6%	1.7%	1.8%	308
Some other type of cruise	4.6%	1.6%	1.7%	267
Cruise on another lake or river	4.5%	1.9%	2.0%	227
Cruise on the St. Lawrence River	1.6%	0.2%	0.3%	571
Great Lakes cruise	1.1%	0.4%	0.4%	292
Submarine cruise	1.0%	0.2%	0.2%	390

Benefits Sought While on Vacation

As with most U.S. Pleasure Travellers, those who visited British Columbia take a vacation to get a break from their day-to-day environment, relax and relieve stress, create lasting memories, see something new and enrich family relationships. However, relative to the typical U.S. Pleasure Traveller, those who visited British Columbia are especially likely to pursue vacations that provide intellectual stimulation, opportunities to learn and novelty (i.e., to see and do something new). This suggests that British Columbia should emphasize its distinctive culture as well as its intellectually stimulating activities (e.g., aboriginal cultural experiences, arts festivals, natural history) when targeting this sector of the American pleasure travel market.

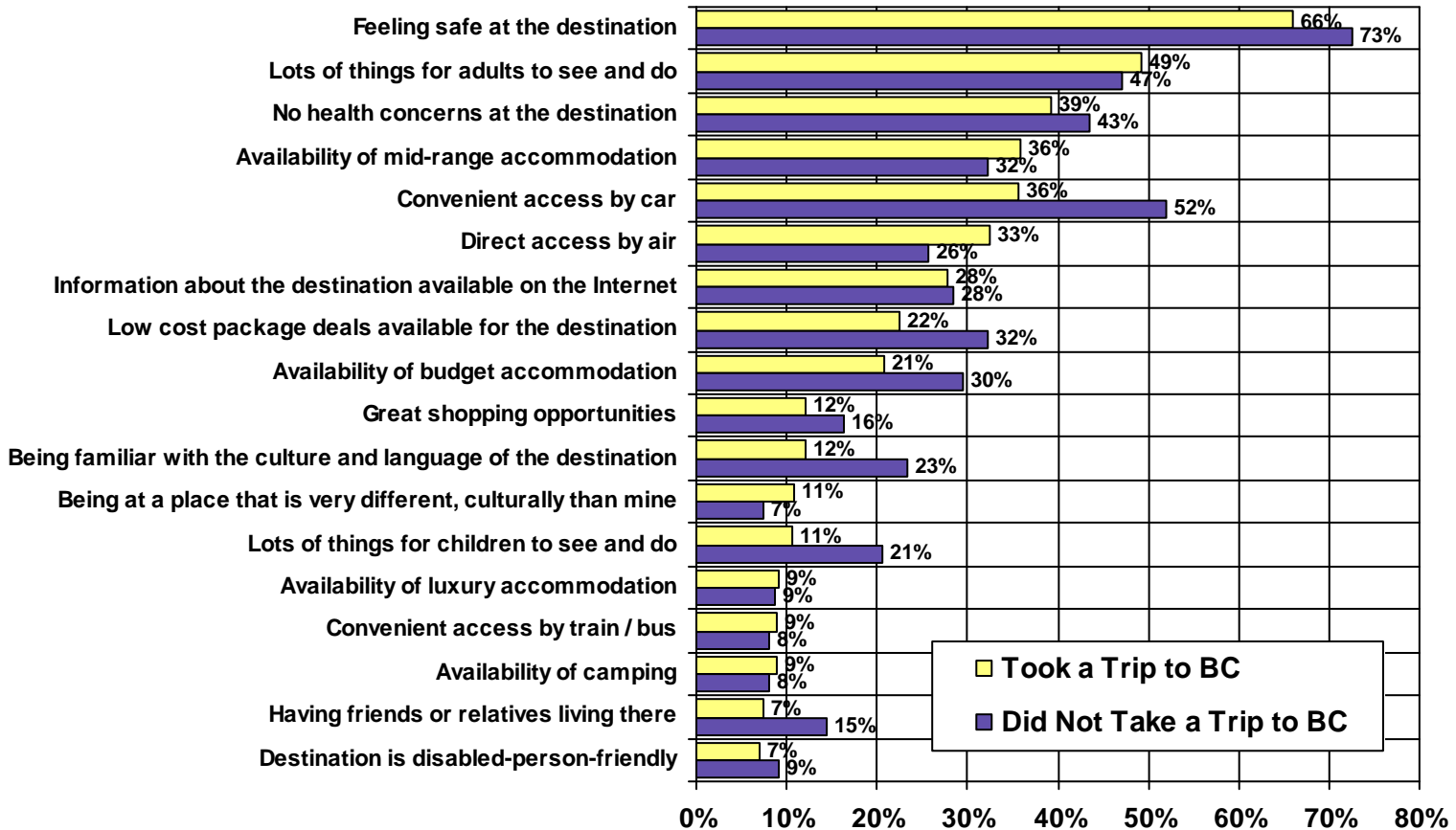
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

As with the majority of U.S. Pleasure Travellers, those who visited British Columbia consider it important that they feel safe at a destination. However, relative to the average U.S. Pleasure Traveller, British Columbia visitors are especially attracted to destinations that are culturally distinctive, offers both camping and mid-range priced accommodation and that are conveniently accessible by air, bus or train. On the other hand, reflecting their age and affluence, they are less concerned than others whether a destination is conveniently accessible by car, has family and friends living nearby or offers lots of activities for children to see and do. They are also less concerned than others whether a destination has budget accommodation, discount vacation packages available or great shopping opportunities.

Fig. 14 Importance of Destination Attributes (% Rating Each Attribute as "Highly Important")



How Destinations Are Selected

Similar to the average U.S. Pleasure Traveller, the majority of British Columbia visitors start planning vacations with a particular destination in mind. However, those who visited British Columbia are more likely than others to begin planning winter trips by first considering what activities they would like to do.

Fig. 15 How Destinations Are Selected (Summer and Winter Vacations)

	Took a Trip to British Columbia	Did Not Take a Trip to British Columbia	Pleasure Travellers	Index
Size of Market	7,025,878	163,484,363	170,510,241	100
Summer				
Started with a desired destination in mind	64.4%	57.9%	58.2%	111
Started by considering specific activities wanted to do	9.9%	9.9%	9.9%	99
Started with a certain type of vacation experience in mind	15.3%	17.4%	17.3%	89
Looked for packaged deals - no destination in mind	1.6%	1.1%	1.1%	145
Considered something else first	3.8%	4.6%	4.6%	83
Don't know / Other	5.0%	9.1%	8.9%	56
Winter				
Started with a desired destination in mind	63.1%	58.7%	58.9%	107
Started by considering specific activities wanted to do	13.7%	11.1%	11.3%	121
Started with a certain type of vacation experience in mind	13.6%	14.8%	14.8%	92
Looked for packaged deals - no destination in mind	2.1%	1.4%	1.4%	149
Considered something else first	3.8%	5.4%	5.3%	71
Don't know / Other	3.7%	8.5%	8.3%	45

Trip Planning and Information Sources Consulted

Most of those who took a trip to British Columbia were responsible for planning their trips either on their own (40.8%) or with someone else (20.5%). When making vacation plans, they tend to consult a wider variety of sources than the average U.S. Pleasure Traveller. The majority use Internet websites, past experience and word-of-mouth to plan their travel. However, visitors to British Columbia are twice as likely as the average U.S. Pleasure Traveller to obtain travel information from travel guidebooks such as Fodor's, travel agents, television programs, newspaper or magazine articles and trade, travel or sports shows.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Took a Trip to British Columbia	Did Not Take a Trip to British Columbia	Pleasure Travellers	Index
Size of Market		7,025,878	163,484,363	170,510,241	100
Who Plans Trips?	Respondent plans trips	40.8%	39.1%	39.2%	104
	Trip planning a shared responsibility	20.5%	17.5%	17.6%	117
	Someone else plans trips	38.7%	43.4%	43.2%	89
Information Sources Consulted	An Internet website	84.9%	75.6%	76.0%	112
	Past experience / Been there before	60.9%	54.2%	54.5%	112
	Advice of others / Word-of-mouth	55.4%	44.9%	45.4%	122
	Maps	49.0%	31.9%	32.7%	150
	Official travel guides or brochures from state / province	40.3%	19.7%	20.6%	196
	An auto club such as AAA	39.3%	23.3%	24.0%	164
	A travel agent	38.6%	17.7%	18.6%	207
	Articles in newspapers / magazines	36.2%	17.3%	18.1%	199
	Travel guide books such as Fodor's	29.8%	11.2%	12.0%	248
	Travel information received in the mail	29.4%	15.1%	15.8%	187
	Visitor information centres	28.4%	20.0%	20.4%	139
	Advertisements in newspapers / magazines	19.4%	10.5%	10.9%	178
	Programs on television	16.4%	6.7%	7.1%	230
	An electronic newsletter or magazine received by e-mail	11.8%	5.7%	6.0%	197
	Visits to trade, travel or sports shows	5.8%	2.3%	2.4%	240
Advertisements on television	5.7%	3.9%	4.0%	142	

Use of the Internet to Plan and Arrange Trips

U.S. Pleasure Travellers who took a trip to British Columbia are among the heaviest users of the Internet to research (81.2%) and book travel (66.1%). The majority use travel planning / booking websites (e.g., Expedia), airline websites and hotel or resort websites. However, relative to the average U.S. Pleasure Traveller, they are especially likely to visit the websites of cruise lines or motorcoach lines. As with most U.S. Pleasure Travellers, British Columbia visitors most often use the Internet to purchase airline tickets and accommodation. However, British Columbia visitors are also especially likely to use the Internet to arrange for car rentals, purchase vacation packages and tickets for specific attractions or events and to buy tickets for travel by rail, bus or boat / ship.

Fig. 17 Use of the Internet to Plan and Book Travel

		Took a Trip to British Columbia	Did Not Take a Trip to British Columbia	Pleasure Travellers	Index
	Size of Market	7,025,878	163,484,363	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	18.8%	31.5%	31.0%	61
	Uses Internet to plan trips only	15.1%	20.3%	20.1%	75
	Uses Internet to book part of trip	66.1%	48.2%	48.9%	135
Types of Websites Consulted	A travel planning / booking website	68.3%	55.0%	55.6%	123
	An airline website	66.2%	44.5%	45.6%	145
	A website of a hotel or resort	65.3%	52.7%	53.3%	122
	A tourism website of a country / region / city	48.5%	34.4%	35.1%	138
	A website of an attraction	39.6%	33.0%	33.4%	119
	A cruise line website	34.8%	11.3%	12.4%	280
	Some other website	30.4%	24.8%	25.1%	121
	A motorcoach website	2.9%	1.3%	1.3%	216
Parts of Trips Booked Over The Internet	Air tickets	85.3%	69.7%	70.6%	121
	Accommodation	75.6%	71.6%	71.9%	105
	Car rental	55.7%	36.9%	38.0%	147
	Tickets or fees for specific activities or attractions	32.4%	26.0%	26.3%	123
	A package containing two or more items	29.2%	17.1%	17.8%	164
	Tickets for rail, bus or boat / ship fares	26.1%	11.0%	11.9%	220
	Other	4.3%	2.8%	2.9%	148

Appendix One		
U.S. TAMS 2006 Culture and Entertainment Segmentation		
Activity Segment	Activities in Segment	
Historical Sites, Museums & Art Galleries	Well-known Historic Sites or Buildings	Well-known Natural Wonders
	Other Historic Sites, Monuments and Buildings	Historical Replicas of Cities or Towns With Historic Re-Enactments
	Strolling Around a City to Observe Buildings and Architecture	Museum - Military /War Museums
	Museum - General History or Heritage Museums	Art Galleries
Shopping & Dining	Shop Or Browse - Bookstore or Music Store	Shop Or Browse - Antiques
	Shop Or Browse - Clothing, Shoes and Jewellery	Shop Or Browse - Gourmet Foods in Retail Stores
	Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	Shop Or Browse - Greenhouse or Garden Centre
	Dining - Restaurants Offering Local Ingredients and Recipes	Went to Local Outdoor Cafes
Aboriginal Cultural Experiences	Aboriginal Cuisine (Tasted or Sampled)	Aboriginal Arts and Crafts Shows
	Aboriginal Heritage Attractions (e.g., Museums, Interpretive Centres)	Aboriginal Cultural Experiences in a Remote or Rural Setting
	Aboriginal Festivals & Events (e.g., Powwows)	Aboriginal Outdoor Adventure and/or Sports
Fairs & Festivals	Farmers' Markets or Country Fairs	Firework Displays
	Carnivals	Ethnic Festivals
	Exhibition or Fairs	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Food/Drink Festivals	Circus
Science & Technology Exhibits	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
Theme Parks & Exhibits	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Wax Museums
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	Jazz Concert
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	
Theatre, Film & Musical Festivals	Theatre Festivals	International Film Festivals
	Comedy Festivals	Music Festivals
	Literary Festivals or Events	
Tastings	Went to Wineries for Day Visits and Tasting	Cooking/Wine Tasting Courses
	Went to Breweries for Day Visits and Tasting	Visited Food Processing Plants (e.g., Cheese Factory)
Casino, Theatre & Comedy Clubs	Stand-Up Comedy Clubs and Other Variety Shows	Live Theatre with Dinner
	Went to a Casino	Live Theatre
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National/Provincial Park
	Curatorial Tours	
National & International Sporting Events	National/International Sporting Events such as the Olympic Games	Curling Bonspiel
	Professional Figure Skating	Professional Soccer Games

Appendix One		
U.S. TAMS 2006 Culture and Entertainment Segmentation		
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Rock Concerts & Dancing	Rock & Roll / Popular Music Concert	Recreational Dancing
Archaeological Digs & Sites	Archaeological Digs	Paleontological / Archaeological Sites
Equestrian & Western Events	Equine (Horse) Competitions	Country / Western Music Concerts
	Western Theme Events (e.g., Rodeos)	Auto Races
	Horse Races	
Fine Dining & Spas	High-End Restaurants with an International Reputation	Day Visit to a Health and Wellness Spa while on an Overnight Trip
	Other High-End Restaurants	
Agro-Tourism	Dining At A Farm	Harvesting and /or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	Entertainment Farms (e.g., Corn Maze, Petting Barnyard)
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related

Appendix Two: U.S. 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	White Water Rafting
	Hiking/Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
	Ice Climbing	Wilderness Skills Courses
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkelling in Sea /Ocean
	Sunbathing, Sitting on a Beach	Ocean Kayaking or Canoeing
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Scuba & Snorkelling	Scuba Diving in Lakes /Rivers	Scuba Diving in Sea /Ocean
	Snorkelling 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	Snowshoeing
Extreme Skiing	Heli-Skiing	Cross Country or Back Country as an Overnight Touring Trip
	Ski Jouring	
Hockey, Skating, Rollerblading & Skateboarding	Ice-Hockey	In-Line /Rollerblading
	Ice-Skating	Skateboarding
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	Bungee Jumping
Team Sports	Football	Basketball
	Baseball or Softball	Soccer
Games & Individual Sports	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	