



## **RESEARCH SERVICES**

### **Travel Activities and Motivations of U.S. Visitors to BC: Activity Profile**

#### **Focus on Recreational Cycling and Mountain Biking**

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The survey was conducted in Canada and the United States between January 2006 and June 2006. Only adults (18 years and over) were recruited to complete the survey. The reference period for the data is 2004 and 2005.

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The Atlantic Canada Opportunities Agency	Alberta Economic Development
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## I. Executive Summary

### RECREATIONAL CYCLISTS AND MOUNTAIN BIKERS ARE A NICHE MARKET FOR BRITISH COLUMBIA

At nearly three million, *Cyclists and Mountain Bikers* – American adults who take vacations *in order to go Cycling and/or Mountain Biking* – are an important tourism market. They represent 1-in-50 of the 166.0 million American overnight pleasure travellers to *any destination* and 1-in-16 of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so.

### BRITISH COLUMBIA ATTRACTS CYCLISTS AND MOUNTAIN BIKERS AT A HIGHER THAN AVERAGE RATE.

While a small niche market, Cyclists and Mountain Bikers are three times as likely to have travelled to British Columbia recently as would be expected given their share of the total U.S. pleasure travel market. At approximately 305,000, this sector represents about six percent of the 5.3 million American adults with pleasure travel experiences in British Columbia over a two-year period.

### BRITISH COLUMBIA ATTRACTS MORE CYCLISTS THAN MOUNTAIN BIKERS DUE TO THE LARGER OVERALL SIZE OF THE CYCLING MARKET.

Cyclists are four times as likely, whilst Mountain Bikers are only three times as likely to have travelled to British Columbia recently, as would be expected given their share of the total U.S. pleasure travel market. At approximately 221,000, Cyclists represents about four percent of the 5.3 million American adults with pleasure travel experiences in British Columbia over a two-year period, whilst at 135,000, Mountain Bikers represents about three percent (of the 5.3 million American adults with pleasure travel experiences in British Columbia over a two-year period). BC has attracted 12.8% of the US mountain bike market and 9.9% of the US cycling market.

### THEY LIVE IN JUST ABOUT EVERY U.S. STATE.

Cyclists and Mountain Bikers live in just about every one of the fifty states but not surprisingly, are apt to reside in states where opportunities to participate in the sport are most prevalent – such as the Mountain and Pacific states.

The **Pacific** states are home to about 1-in-6 adult Americans but significantly more Cyclists and even more Mountain Bikers live in the three Pacific states: California, Oregon or Washington. California is the most populated of the Pacific states, accounting for about 1-in-8 adult Americans and for a slightly

higher proportion of Cyclists but represents one-quarter of the entire U.S. Mountain Biking market.

Mountain Biking seems to be particularly popular among pleasure tourists who reside in **Mountain** states. One-seventh of the Mountain Biking market lives in these states whereas only 1-in-14 adult Americans do. The Mountain Bikers in this region are spread across numerous states, but the highest concentration is in Colorado, with 1-in-13 residing in this state. Cyclists, while slightly over-represented in Mountain states, more closely resemble this region's share of all American adults.

Cycling seems to be particularly popular among pleasure tourists in **East North Central, Middle** and **South Atlantic** states. One-fifth of the Cycling market lives in **East North Central** states whereas only one-tenth of Mountain Bikers do. One-seventh of the Cycling market lives in **Middle** and **South Atlantic** states and the same proportion of Mountain Bikers live in **South Atlantic** states whereas only one-eleventh of Mountain Bikers live in **Middle Atlantic** States, with the highest percentage residing in **New York State**.

Regional marketing efforts to attract Cyclists and Mountain Bikers may be facilitated by their concentration in the Pacific region – a region that is an especially strong feeder market for British Columbia

#### **MOUNTAIN BIKERS ARE YOUNGER AND CYCLISTS ARE OLDER.**

**Mountain Bikers** tend to be concentrated at the younger end of the age spectrum. About 1-in-5 of them are young adults (18 to 24 years), and 1-in-3 are between 25 to 34 years of age. One-quarter are in their mid-thirties to mid-forties, nearly one-fifth are in their mid-forties to mid-fifties and one-eighth are in their mid-fifties to mid-sixties. Only 1-in-50 Mountain Bikers are 65 years of age or older.

**Cyclists**, in contrast, are concentrated at the older end of the age spectrum. One-quarter of these tourists are 55 years of age or over and close to one-third are between the ages of 45 to 54 years of age and fewer than 1-in-10 are between the ages of 18 to 24 years.

#### **MOUNTAIN BIKERS ARE PREDOMINATELY MALE**

Men (58%) are somewhat more likely to be **Cyclists** than women (42%) but **Mountain Bikers** are predominately male, representing three-quarters of the market, whilst women represent only one quarter of the market.

**CYCLISTS AND MOUNTAIN BIKERS ARE EDUCATED AND AFFLUENT.**

Tourists in this niche market tend to be more educated (two-thirds of Cyclists and three-fifths of Mountain Bikers have a post-secondary diploma or degree), are more apt to occupy professional or managerial positions (one-third of Cyclists and one-quarter of Mountain Bikers) and to be more affluent (one-third of each group fall within the \$100,000+ bracket) than are typical American pleasure tourists. They more closely resemble the typical U.S. tourist to British Columbia in terms of education and income.

**1-IN-4 AMERICAN CYCLISTS AND MOUNTAIN BIKERS HAVE BEEN TO CANADA ON A RECENT OVERNIGHT PLEASURE TRIP.**

Canada emerges as a particularly attractive destination for cycling enthusiasts. It attracts one-quarter of all American Cyclists and Mountain Bikers, compared to only about 1-in-7 typical U.S. pleasure tourists with recent pleasure trips to Canada (13%). Canada clearly leads the market (at 26%) but other foreign competitive destinations for Cyclists and Mountain Bikers include *Mexico* (19% Cyclists; 21% Mountain Bikers), *Europe* (16% Cyclists; 14% Mountain Bikers), and the *Caribbean* (13% Cyclists; 12% Mountain Bikers).

**ONTARIO IS THE PRINCIPLE CANADIAN COMPETITOR FOR AMERICAN CYCLISTS BUT BRITISH COLUMBIA LEADS THE MARKET FOR MOUNTAIN BIKERS.**

Over a two-year period, this central Canadian province attracted 1-in-7 Cyclists (15%) compared to **British Columbia's** 1-in-10 (10%). However, for Mountain Bikers, Ontario only attracts 1-in-10 (10%) whilst British Columbia attracts a higher proportion, 1-in-8 (or 13%). **British Columbia** is an attractive destination for Mountain Biking enthusiasts.

**CYCLISTS AND MOUNTAIN BIKERS ARE DRAWN TO SUN/SEA STATES.**

Collectively, sun/sea destinations, including Florida, California, and Nevada attract over two-thirds of Cyclists (67%) and Mountain Bikers (69%) for overnight pleasure trips. On a state-by-state basis, **Florida**, followed by **California**, **New York**, **Nevada** and **Colorado** are the most popular U.S. destinations for *Cyclists* when travelling outside their home state. Similar to Cyclists, **Florida** and **California** are the top destinations for *Mountain Bikers*, however **Nevada**, **Colorado** and **Arizona** rank higher than **New York State**. As such, these states represent stiff competition for British Columbia's Cycling and Mountain Biking businesses.

## A SAFE DESTINATION IS A PRIORITY.

Most Cyclists and Mountain Bikers start a trip planning process with a *destination* in mind although about one-quarter of these tourists start their trip planning process with a focus on the **type of vacation experience** they wish to have and one-fifth begin with the **activities** they want to enjoy while on their trip. The destination should be *safe*, have *many things for adults to see and do*, offer *convenient access by car*, pose *no health concerns*, and *have destination information available on the internet*.

## CYCLISTS AND MOUNTAIN BIKERS ARE MULTI-DIMENSIONAL TRAVELLERS BUT TEND TO BE OUTDOOR TOURISTS.

There is considerable overlap between Cyclists and Mountain Bikers and other outdoor sectors of interest to tourism businesses in British Columbia.<sup>2</sup> As demonstrated by their representation in other activity-based tourism sectors, Cyclists and Mountain Bikers are multi-dimensional travellers.

About one-third of *Cyclists* are also **Hikers, History/Heritage Tourists** and/or **Campers/RVers**, nearly one-quarter are **Alpine Skiers** and over one-fifth are **Anglers** and/or **Travellers on Self-Guided Overnight Tours**.

Nearly one-half of *Mountain Bikers* are also **Hikers**, over one-third are also **Campers and RVers, Alpine Skiers** and/or **History/Heritage Tourists**, about one-quarter are **Travellers on Self-Guided Overnight Tours** and/or **Divers/Snorkellers** and about one-fifth are **Anglers**.

Their predisposition toward outdoor activities is evident in the fact that compared to the U.S. travelling public as a whole; **Cyclists** are ten times as likely to be Sea Kayakers and Nordic Skiers. They are more than six times as likely to be River Rafters, Snowmobilers and Hikers and five times as likely to be Divers/Snorkellers. They are also more than three times as likely as U.S. travellers as a whole, to take trips in order to be Backcountry Lodge Guests, go Alpine Skiing, or to obtain Aboriginal cultural experiences, as well as to go golfing and/or camping/RVing

**Mountain Bikers** are more than ten times as likely as the U.S. travelling public as a whole to take trips in order to be Sea Kayakers, River Rafters, and/or Nordic Skiers. They are more than six times as likely to be Divers/Snorkellers, Hikers,

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<sup>2</sup> Sectors are defined in terms of selective activities as the main reason for a trip because these "dedicated" markets represent a crystallization of the interests and characteristics that might attract more casual participants to the activity (any participation). Fifteen sectors were selected by Tourism British Columbia for the purposes of this project. These sectors do not represent the full range of sectors in the British Columbian tourism industry. See the Appendix for a list of sectors and their definitions.

Alpine Skiers and/or Snowmobilers and are five times as likely to be Backcountry Lodge Guests. They are also more than three times as likely to take trips in order to obtain Aboriginal cultural experiences, to go camping/RVing and to go golfing and they are more than twice as likely to take trips to go fishing or obtain history and heritage experiences and to take self-guided overnight tours, than are the American travelling public as a whole.

### **MANY OUTDOOR EXPERIENCES ARE POPULAR AMONG CYCLISTS AND MOUNTAIN BIKERS.**

Their higher level of engagement with the outdoors on trips vis à vis the typical American tourist suggests that these cycling enthusiasts represent distinctive markets. Although they particularly enjoy land-based activities Cyclists and Mountain Bikers are also partial to water based activities. They like to be active while on vacation but they also enjoy taking time to enjoy and relax in nature. Mountain Bikers are more apt to be motivated by and participate in more rigorous outdoor activities, than are Cyclists.

**Mountain Bikers** *land based outdoor* interests include hiking, taking trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them, to go alpine skiing and/or climbing.

**Cyclists** *land based outdoor* interests include hiking, taking trips to visit a national, provincial or state nature parks or to visit well-known natural wonders, to view flora and fauna and/or go jogging.

*Water based activities* are also popular motivations for recent overnight pleasure trips for **Mountain Bikers**, activities include enjoying sunbathing or sitting on a beach, swimming in oceans, diving/snorkelling, swimming in lakes, motor/sail boating, fishing, especially in fresh water or kayaking/canoeing.

**Cyclists** *Water based activities* include enjoying sunbathing or sitting on a beach, swimming in lakes, fishing, especially in fresh water and/or motor/sail boating.

### **CYCLISTS AND MOUNTAIN BIKERS ARE NOT ESPECIALLY DRIVEN TO TAKE CULTURAL, CULINARY OR SHOPPING TRIPS.**

By and large, Cyclists and Mountain Bikers utilize destinations' cultural, culinary and retail infrastructure as *things to see and do* while on overnight pleasure trips rather than as the driving force behind or motivation for their trips. Entertainment-oriented activities in general, and particularly theme parks and

spectator sporting events are, however, trip motivators for Cyclists and Mountain Bikers, attracting about 1-in-3 of these tourists.

About one-half of Cyclists and Mountain Bikers have sought out a well-known historic site, visited a museum or strolled around a city to observe its buildings and architecture on recent pleasure trips but only 1-in-5 have taken a trip in order to engage in these activities.

Perhaps because they tend to live in families with children, Mountain Bikers are particularly apt to take a trip to go to an amusement park. Casinos are popular entertainment venues, especially for Mountain Bikers; they could be attracting younger males who participate in this sport.

Movies and farmers' markets or country fairs are popular trip activities (*any*) among about two-fifths of Cyclists, whereas over one-third of Mountain Bikers are attracted by rock & roll or popular concerts. Zoos, aquariums and fireworks displays also attract about one-third of Cyclists and Mountain Bikers. While Cyclists are as likely as Mountain Bikers to go to a zoo, aquarium, movie, free outdoor performances in a park setting and/or firework display while on a recent overnight pleasure trip, they are somewhat more likely to include farmers' markets or country fairs among their trip activities.

Similar to many entertainment-oriented activities, dining out at restaurants offering *local* ingredients and cuisine, taking a day to enjoy wine tasting and visiting local outdoor cafes are much more common trip experiences (*any*) than trip drivers for Cyclists and Mountain Bikers.

Shopping for apparel, books or music and local arts and crafts is a common trip pastime for Cyclists and Mountain Bikers but tends not to be the motivation for their recent overnight pleasure travel.

#### THE INTERNET TOPS THE CHART AS A TRIP PLANNING TOOL.

Of the many sources of travel information available to Cyclists and Mountain Bikers, the internet tops the chart. Over 8-in-10 of these tourists rely on the **internet** for travel information, 6-in-10 rely on their own **past experience** and 5-in-10 rely on anecdotal information provided by **friends and relatives** as well as **maps**. About one-third rely on **newspapers, auto clubs, official DMO travel guides** and on **Visitor Information Centres** to obtain travel information. In the main, these are the same sources of information that may be influencing American pleasure travellers who have recently done so, to take trips to British Columbia.



## CYCLISTS AND MOUNTAIN BIKERS HAVE VERY FAVOURABLE IMPRESSIONS OF BRITISH COLUMBIA.

American Cyclists and Mountain Bikers are most enthusiastic about **Hawaii** as an *appealing destination* for pleasure travel. Cyclists accord this tropical state a rating of 8.4 and Mountain Bikers an even higher rating of 8.7 on a ten-point scale. Though significantly lower than Hawaii's, moderately favourable ratings are accorded a host of destinations, including **Colorado** (7.8 Cyclists; 8.0 Mountain Bikers), **California** (7.7 Cyclists; 8.0 Mountain Bikers), **British Columbia** (7.4 Cyclists; 7.1 Mountain Bikers), **Arizona** (7.3 Cyclists; 6.9 Mountain Bikers), and **Florida** (7.1 Cyclists; 7.2 Mountain Bikers).

**British Columbia** is rated higher than New York State and Arizona and *any* other Canadian province or territory by Cyclists (7.4) and among Mountain Bikers (7.1). Among Cyclists, British Columbia has a higher rating than Florida but among Mountain Bikers it is rated marginally lower. Despite British Columbia's success among those offering an appraisal, it is important to note that about one-fifth of U.S. Cyclists and Mountain Bikers refrain from rating the province, presumably because they know too little about the destination to offer an opinion about its touristic appeal.

## AWARENESS AND IMAGE BUILDING ARE THE KEY CHALLENGES.

With their particular constellation of outdoor interests and, for many of them, geographic proximity to British Columbia, U.S. Cyclists and Mountain Bikers seem an ideal market for the province. At present, however, the province is attracting only about six percent of this market, suggesting that until more of them are aware of the cycling, mountain biking and other outdoor activities British Columbia can offer, they may not explore beyond competing destinations in the U.S. and elsewhere in the world.

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## II. Introduction

### A. Background and Objectives

Visitors engage in tourism activities based on their personal interests and requirements, selecting from the many and varied types of experiences offered in their destinations. They can be grouped into market segments or *activity-based* sectors, reflecting the experiences they seek when they travel – to British Columbia or elsewhere.

Whether in its cities, towns or countryside, British Columbia clearly offers a wide array of tourism experiences and attracts tourists from many different sectors. By learning more about Americans who are in the market for some of these travel experiences, British Columbia's tourism businesses can more effectively target their products and marketing efforts to attract tourists.

To support these efforts, *Experiences B.C. Sector Development Program*, Tourism British Columbia (TBC) and other stakeholders selected the following array of activity-based sectors as the focus of a series of American tourist profiles based on the recently released 2006 Travel Activities and Motivation Survey (TAMS).<sup>3</sup>

- River Rafters
- Backcountry Lodge Guests
- **Recreational Cyclists/Mountain Bikers**
- History and Heritage Tourists
- Snowmobilers
- Divers & Snorkellers
- Nordic Skiers & Other Non-Alpine Winter Sport Participants<sup>4</sup>
- Golfers
- Alpine Skiers
- Aboriginal Activity Tourists
- Anglers
- Self-Guided Overnight Touring Travellers
- Hikers
- Campers/RVers

Even though these profiles span a wide range of tourism experiences, it is recognized that they cover only a fraction of the experiences British Columbia offers its tourists. This profile describes **Recreational Cyclists and Mountain Bikers** (hereafter referred to as **Cyclists/Mountain Bikers**).

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<sup>3</sup> See Appendix for a brief description of the TAMS study and the activities used to define each of the activity sectors.

<sup>4</sup> Throughout this report, *Nordic Skiers* is used as a convenient “short form” to cover travellers who claim to have taken trips for any of the following main reasons in the past two years: cross country skiing, ski touring, dog sledding, snow shoeing.

## B. The American Cyclists and Mountain Bikers Report

For purposes of this report, American **Cyclists** and **Mountain Bikers** are American adults (18 years of age or over) who claim to have taken an overnight pleasure trip to any destination in the past two years<sup>5</sup> and indicate that one or more of the following was the **main reason** for at least one of the overnight trips they took over this same time period.

### Main Reason for Trip

- ❖ *To participate in Recreational cycling — as a same day excursion*
- ❖ *To participate in Cycling — as an overnight touring trip*
- ❖ *To participate in Mountain biking*

### Note to Readers

Activities and locations visited are *independent* of one another.

In other words, American Cyclists and Mountain Bikers claim to have taken an overnight trip motivated by cycling/mountain biking in the past two years or so and to have taken overnight pleasure trips to specific destinations but TAMS does not provide information that links the activities to the destination(s) visited. Thus, Cyclists and Mountain Bikers may or may not have participated in cycling/mountain biking in a particular country, province or state they have visited recently for an overnight pleasure trip.

People who take a trip *in order to go cycling/mountain biking* are only a fraction of tourists who *go cycling/mountain biking* on their vacations. In fact, over ten million Americans say they participated in any cycling while on a trip over a two-year period.<sup>6</sup> Of these 10.6 million American pleasure tourists, 2.9 million (27%) say they took a trip *in order to go cycling/mountain biking*.

Recreational Cyclists and Mountain Bikers are the focus of this report because as “dedicated” or “hard core” markets, they represent a crystallization of the interests and characteristics that might attract more casual participants to the activity.

<sup>5</sup> Since fieldwork for the TAMS 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.

<sup>6</sup> See Detailed Tabulations, Volume 4, Table 2-4.

The report provides the following information:

- Size of the sector
- Incidence of travel experience in British Columbia
- Demographic profile
- Competitive destinations
- Ratings of British Columbia as a destination
- Other popular trip activities
- Trip planning and media behaviour
- Benefits of travel

### III. Overview of U.S. Tourism Activity Sectors

#### A. The U.S. Pleasure Travel Market to British Columbia

Tourism businesses in British Columbia are competing for the attention of about 166.0 million American adults who are in the market for overnight vacations (see Table A).<sup>7</sup> These individuals claim to have taken at least one overnight pleasure or vacation trip over a two-year period. They represent three-quarters of the 222.8 million adults who live in the U.S.A.

Close to one-tenth of the American overnight pleasure travel market, or about 15.4 million tourists, have had *some* experience with British Columbia over the past decade (9%).<sup>8</sup> They may have been on a vacation, visiting friends and relatives or on a business trip to the province. Of these overnight travellers who took trips for any reason, close to half claim to have visited British Columbia in the past two years or so (45% or 6.9 million).

<b>TABLE A: OVERVIEW OF BRITISH COLUMBIA'S MARKET SIZE</b>	<b>Recent U.S. Pleasure Travellers Any Destination</b>	
Unweighted base	(45,697)	
Weighted, Projected	166,003,000	
<b><u>Overnight Trips to British Columbia</u></b>		
Any purpose, past 10 years	15,377,000	9%
Any purpose, past 2 years	6,933,000	4%
<b>Pleasure, past 2 years</b>	<b>5,340,000</b>	<b>3%</b>

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Table 47-4.

Most of these recent U.S. visitors to the province – 5.3 million of them – were on vacation or pleasure trips. In other words, while tourism businesses in British Columbia may be competing for the attention of about 166.0 million American overnight pleasure travellers, they have attracted 1-in-33 (3%) of these tourists to the province over a two-year period.

<sup>7</sup> Adults are defined as individuals 18 years of age or older.

<sup>8</sup> Since fieldwork for the TAMS study was conducted between January and June 2006, the “past ten years” likely refers to 1995 through 2005 and the “past two years” likely refers to 2004 and 2005. See footnote in Section II.B for more information on interpreting these recall periods.

The profiles of various activity-based sectors<sup>9</sup> described in this report are based on Americans who have taken a recent overnight pleasure trip to *any destination* (166.0 million) and, where feasible, on the subset of these tourists who have been to British Columbia over the two-year period (5.3 million).<sup>10</sup>

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<sup>9</sup> Sectors are defined in terms of selective activities as the *main reason* for a trip because these “dedicated” markets represent a crystallization of the interests and characteristics that might attract more casual participants to the activity (*any* participation). It is recognized that the sectors included in the profiles cover only a fraction of the experiences British Columbia offers its tourists.

<sup>10</sup> Sample sizes of less than 100 records for tourists with recent pleasure trips in British Columbia are not sufficiently robust to warrant analysis.



## B. Tourism Activity Sector Size

Several outdoor-oriented tourism segments of importance to British Columbia represent relatively small *niche* markets, both within the overall U.S. pleasure travel market and among those who have recent tourism experience in British Columbia.<sup>11</sup> Examples of these niche markets include **River Rafters**, **Sea Kayakers**, **Snowmobilers** and **Nordic Skiers**. Each of these sectors represents approximately 1-in-100 U.S. overnight pleasure travellers [see Table B].

Trips driven by **cycling** or staying in **wilderness or remote lodges** are slightly more common, representing about 1-in-50 U.S. overnight pleasure tourists. **Golfers** represent 1-in-25 pleasure tourists while **Hikers** and **Alpine Skiers** represent just over 1-in-20 (each). Approximately 1-in-12 are **Anglers**.

TABLE B: OVERVIEW OF SELECTED SECTOR MARKET SIZE <sup>1</sup>	U.S. Overnight Pleasure Travellers To . . . In Past 2 Years				
	Any Destination		British Columbia		
Unweighted base	(45,697)		(1,706)		
Weighted, Projected	166,003,000		5,340,000		
<i>In Rank Order by Tourists to British Columbia</i>					<b>Index</b>
Self-Guided Overnight Touring Travellers	17,550,000	11%	1,370,000	26%	236
History and Heritage Tourists	23,218,000	14%	1,180,000	22%	157
Campers/RVers	17,426,000	11%	833,000	16%	145
Alpine Skiers	9,637,000	6%	689,000	13%	217
Hikers	9,704,000	6%	607,000	11%	183
Anglers	12,380,000	8%	598,000	11%	138
Aboriginal Activity Tourists	4,442,000	3%	454,000	9%	300
Divers & Snorkellers	5,410,000	3%	360,000	7%	233
Golfers	5,890,000	4%	352,000	7%	175
<b>Recreational Cyclists/Mountain Bikers</b>	<b>2,914,000</b>	<b>2%</b>	<b>305,000</b>	<b>6%</b>	<b>300</b>
<b>Cyclists</b>	<b>2,231,000</b>	<b>1%</b>	<b>221,000</b>	<b>4%</b>	<b>400</b>
<b>Mountain Bikers</b>	<b>1,055,000</b>	<b>1%</b>	<b>135,000</b>	<b>3%</b>	<b>300</b>
Nordic Skiers	1,567,000	1%	265,000	5%	500
Backcountry Lodge Guests	2,873,000	2%	224,000	4%	200
River Rafters	2,406,000	1%	157,000	3%	300
Snowmobilers	1,712,000	1%	101,000	2%	200
Sea Kayakers	575,000	*	77,000	1%	333

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Table 1. \*Less than 0.5%. <sup>1</sup>Sectors represent overnight pleasure travellers who name specific activities as the **main reason** for one or more overnight trips over a two-year period. These sectors were selected by Tourism British Columbia for the purposes of this report. This list does not represent the full range of sectors in the British Columbian tourism industry.

<sup>11</sup> Sample sizes of less than 100 records for tourists with recent pleasure trips in British Columbia are not sufficiently robust to warrant analysis.

In contrast, trips driven by interests in **History and Heritage, Camping and RVing** or **Self-Directed Touring** are more widespread, representing more than 1-in-10 U.S. overnight pleasure tourists and considerably higher proportions of those who have recently visited British Columbia.

An index that compares the proportion of *all* American tourists in a sector to British Columbia's share is displayed in Table B. In this type of index, "100" is the baseline, representing what British Columbia's share would be if the province were attracting a sector's members at the same rate as the sector members occur in the U.S. overnight pleasure travel market. The province's success in attracting visitors within a sector is evident in the extent to which its index score is greater than 100. Conversely, British Columbia's relative weakness would be evident in the extent to which a score is less than 100.

Based on this index, British Columbia is attracting Americans in **each** sector at an appreciably higher rate than they occur in the U.S. travelling public. Sectors over-represented at **three or more times** the expected rate include:

- Nordic Skiers
- Sea Kayakers
- Aboriginal Activity Tourists
- **Cyclists/Mountain Bikers**
- River Rafters

Other activity-based tourists who come to British Columbia at about **twice** the expected rate based on their incidence in the U.S. pleasure travel market include:

- Self-Guided Overnight Touring Travellers
- Divers & Snorkellers
- Alpine Skiers
- Backcountry Lodge Guests
- Snowmobilers

The remaining sectors are also over-represented among recent U.S. tourists to British Columbia, but not to the extent of those described above:

- Hikers
- Golfers
- Heritage and History Tourists
- Campers/RVers
- Anglers

### **C. Tourism Activity Sector Cross-Over**

Travellers take different trips for different reasons, depending on their interests, their day-to-day realities, the time of year and a host of other factors. For example the same individual might take a summer trip with a primary objective of doing sea kayaking or white water rafting. The same person might take a trip in the winter to ski or to go to museums.

Because travellers often seek a variety of tourism experiences and destinations and because the period covered by the TAMS study is about two years, it is not surprising that the **same** person could be a Sea Kayaker, a River Rafter, an Alpine Skier, a History and Heritage tourist and so on. In other words, the sectors profiled in these materials are not mutually exclusive.

The extent to which membership in the various tourism activity sectors is duplicated is important for understanding how best to package and promote the types of tourism experiences each sector offers potential visitors to British Columbia. As is evident in the following two charts, substantial crossover among the sectors is comparatively rare. In fact, in only the **Aboriginal Activity** sector are at least half the members *also* members of another key sector: History and Heritage Tourists (see Charts A, B).

Chart A: Tourism Activity Sector Cross-Over							
At least 20% Duplication							
Level of Duplication	HISTORY/HERITAGE	ABORIGINAL ACTIVITY	SELF-GUIDED TOURING	CAMPERS/RVers	ALPINE SKIERS	NORDIC SKIERS	SNOW-MOBILERS
50%+		History/Heritage					
30% - 49%						Hikers	Alpine Skiers
						Alpine Skiers	Campers/RVers
						History/Heritage	
						Self-Guided Touring	
20% - 29%	Self-Guided Touring	Campers/RVers	History/Heritage	History/Heritage	Campers/RVers	Campers/RVers	Anglers
	Campers/RVers	Self-Guided Touring		Hikers	History/Heritage	Cyclists	History/Heritage
		Hikers				Anglers	

Generally, duplication of between one-third to one-half is most common between smaller *niche* outdoor sectors and larger, more broadly defined sectors such as History/Heritage, Camping and Self-Guided Touring. For example, between one-third and one-half of **Nordic Skiers** are also categorized as Hikers, Alpine Skiers, History/Heritage and Self-Guided Touring travellers.

In contrast, those in the **History/Heritage** sector do not generally take trips motivated by the outdoor activities highlighted in this series of reports. Instead, there is a relatively low level of duplication (20% to 29%) between these history/heritage enthusiasts and those who take trips in order to do self-guided touring and/or to camp.

Chart B: Tourism Activity Sector Cross-Over								
At least 20% Duplication								
Level of Duplication	RIVER RAFTERS	SEA KAYAKERS	BACK-COUNTRY LODGES	CYCLISTS	HIKERS	DIVERS/SNORKEL- LERS	GOLFERS	ANGLERS
<b>50%+</b>								
<b>30% - 49%</b>	Campers/ RVers	Divers & Snorkellers	Campers/ RVers	Hikers	Campers/ RVers			
	Alpine Skiers	Hikers	History/ Heritage	History/ Heritage	History/ Heritage			
		Campers/ RVers	Anglers	Campers/ RVers				
		Self-Guided Touring						
<b>20% - 29%</b>	History/ Heritage	Alpine Skiers	Self-Guided Touring	Alpine Skiers	Self-Guided Touring	History/ Heritage	History/ Heritage	Campers/ RVers
	Self-Guided Touring	History/ Heritage	Hikers	Self-Guided Touring		Alpine Skiers		History/ Heritage
	Hikers	Anglers		Anglers		Campers/ RVers		
	Anglers							

**Sea Kayakers**, like Nordic Skiers tend to take vacations in order to engage in a relatively wide variety of activities, including diving/snorkelling, hiking, camping, and self-guided touring (see Chart B). **Divers/Snorkellers, Golfers, and Anglers**, on the other hand, are not widely represented in other tourism activity sectors.

## IV. Cyclists and Mountain Bikers Market Profile

### A. Market Composition

The Cycling and Mountain Biking sectors are composed of pleasure tourists who participated in one or more of three types of summer outdoor land activities as the *main reason* for an overnight trip in the past two years. They represent 1-in-50 of the 166.0 million American overnight pleasure travellers to *any destination* and 1-in-16 of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so.

Those who participate in *Recreational cycling as a same day excursion* dominate this sector, representing 6-in-10 of all Cyclists/Mountain Bikers (64%) whilst over 3-in-10 participate in *Mountain Biking* (36%) and 2-in-10 of all Cyclists/Mountain Bikers participate in *Cycling as an overnight touring trip* (20%).<sup>12</sup>

Nearly one-third of Mountain Bikers (31%) also participate in *recreational cycling as a same day excursion* and close to one-fifth of Recreational Cyclists (as a same day excursion) (17%) also go *mountain biking*.

Table C below illustrates the percentage and total number of American Cyclists and Mountain Bikers (on overnight pleasure trips), as well as American Overnight Pleasure Travellers, to any destination and BC; who indicated that their *main trip purpose* was to participate in the activities listed below:

TABLE C: MAIN REASON FOR TAKING OVERNIGHT TRIPS IN 2004-2005 <sup>13</sup>	Total (Cycling & Mountain Biking)	Recreational Cycling	Mountain Biking	Total US Pleasure Tourists British Columbia	Total US Pleasure Tourists Any Destination
<i>Unweighted Base</i>	(884)	(681)	(328)	(1,706)	(45,697)
<i>Weighted, Projected</i>	2,914,000	2,231,000	1,055,000	5,340,000	166,003,000
Cycling – Recreational cycling, same day excursion	1,856,000 64%	1,856,000 83%	325,000 31%	186,000 4%	1,856,000 1%
Cycling – Mountain biking	1,055,000 36%	372,000 17%	1,055,000 100%	135,000 3%	1,055,000 1%
Cycling – as an overnight touring trip	572,000 20%	572,000 26%	93,000 9%	62,000 1%	572,000 0.3%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4 Table 7-4

<sup>12</sup> Sum of percentages for various cycling experiences is more than one hundred percent because of multiple responses. A traveller could participate in more than one cycling activity.

<sup>13</sup> See Detailed Tables, Volume 2, Table 7-4.

## B. Regional and Demographic Characteristics

### 1. Place of Residence

At over two million, **Cyclists** – American adults who take vacations *in order to go recreational cycling* – are an important tourism market. They represent 1-in-100 American overnight pleasure travellers to *any destination* (1%) and 4-in-10 of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so (42%).

While they are also an important market sector, **Mountain Bikers** – American adults who take vacations *in order to go mountain biking* – are less prevalent than Recreational Cyclists. At one million, Mountain Bikers represent less than one percent of American overnight pleasure travellers to *any destination* (0.6%) and three percent of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so.

Table 1 provides the place of residence by U.S. Census Regions and for individual states that emerge as noteworthy for Cyclists and Mountain Bikers. For a list of the states in each of the U.S. Census Regions, please refer to the appendix.

Cyclists and Mountain Bikers live in just about every one of the fifty states but not surprisingly, are apt to reside in states where opportunities to participate in the sport are most prevalent – such as the Mountain and Pacific states.

- The **Pacific** states are home to about 1-in-6 adult Americans (16%) but significantly more Cyclists (23%) and even more Mountain Bikers (32%) live in the three Pacific states: California, Oregon or Washington. California is the most populated of the Pacific states, accounting for about 1-in-8 adult Americans (12%) and for a slightly higher proportion of Cyclists (17%) but represents one-quarter of the entire U.S. Mountain Biking market (25%). By virtue of its large population, California contributes more Cyclists and Mountain Bikers than does any other single state.
- Mountain Biking seems to be particularly popular among pleasure tourists who reside in **Mountain** states. One-seventh of the Mountain Biking market lives in these states (15%) whereas only 1-in-14 adult Americans do (7%). The Mountain Bikers in this region are spread across numerous states, but the highest concentration is in Colorado with 1-in-13 residing in this state (8%). Cyclists, while slightly over-represented in Mountain states (9%) more closely resemble this region's share of all American adults.

- Cycling seems to be particularly popular among pleasure tourists in **East North Central, Middle** and **South Atlantic** states. One-fifth of the Cycling market lives in **East North Central** states (20%) whereas only one-tenth of Mountain Bikers do (11%). One-seventh of the Cycling market lives in **Middle** and **South Atlantic** states (14%) and the same proportion of Mountain Bikers live in **South Atlantic** states (14%) whereas only one-eleventh of Mountain Bikers live in **Middle Atlantic** States (9%), with the highest percentage residing in **New York State** (6% Cyclists and 4% Mountain Bikers).
- In contrast, Cyclists and Mountain Bikers are less likely to live in the southern and central United States than are Americans as a whole. For example, almost 2-in-10 American live in the **South Atlantic** region (including Florida) but only about 1-in-7 Cyclists and Mountain Bikers live in this area. These tourists are also under-represented in **West South Central** (5% each) compared to the U.S. adult population as a whole (11%). Nonetheless, 1-in-25 Cyclists and Mountain Bikers (4%) are **Texans**.
- Other individual states that contribute at least 1-in-20 Cyclists and/or Mountain Bikers include **New York, Pennsylvania, Michigan, Illinois** and **Washington**.

Marketing efforts to attract Cyclists and Mountain Bikers may be facilitated by their concentration in the Pacific region – a region that is an especially strong feeder market for British Columbia.



TABLE 1: PLACE OF RESIDENCE	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists		U.S. Population
	Total (681)	Total (328)	To British Columbia (1,706)	Any Destination (45,697)	Adults (18+ Years) (60,649)
Unweighted base					
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000	222,846,000
<b>Incidence of Cyclists</b>	<b>100%</b>	-	<b>4%</b>	<b>1%</b>	<b>1%</b>
<b>Incidence of Mountain Bikers</b>	-	<b>100%</b>	<b>3%</b>	<b>1%</b>	<b>1%</b>
<b>New England</b>	<b>4%</b>	<b>3%</b>	<b>3%</b>	<b>5%</b>	<b>5%</b>
Massachusetts	2%	1%	1%	2%	2%
Connecticut	2%	1%	1%	1%	1%
<b>Middle Atlantic</b>	<b>14%</b>	<b>9%</b>	<b>6%</b>	<b>14%</b>	<b>14%</b>
New York	6%	4%	3%	6%	7%
Pennsylvania	5%	3%	1%	4%	4%
New Jersey	3%	2%	2%	3%	3%
<b>East North Central</b>	<b>20%</b>	<b>11%</b>	<b>9%</b>	<b>16%</b>	<b>16%</b>
Michigan	5%	3%	2%	4%	4%
Illinois	5%	3%	3%	4%	4%
Wisconsin	4%	2%	1%	2%	2%
Ohio	3%	2%	2%	4%	4%
<b>West North Central</b>	<b>8%</b>	<b>3%</b>	<b>5%</b>	<b>7%</b>	<b>7%</b>
Minnesota	3%	1%	2%	2%	2%
Missouri	3%	1%	1%	2%	2%
<b>South Atlantic</b>	<b>14%</b>	<b>14%</b>	<b>11%</b>	<b>19%</b>	<b>19%</b>
Florida	3%	3%	5%	6%	6%
Virginia	3%	4%	2%	3%	3%
North Carolina	3%	3%	1%	3%	3%
<b>East South Central</b>	<b>3%</b>	<b>7%</b>	<b>2%</b>	<b>6%</b>	<b>6%</b>
<b>West South Central</b>	<b>5%</b>	<b>5%</b>	<b>6%</b>	<b>11%</b>	<b>11%</b>
Texas	4%	4%	5%	7%	8%
<b>Mountain</b>	<b>9%</b>	<b>15%</b>	<b>7%</b>	<b>7%</b>	<b>7%</b>
Colorado	3%	8%	1%	2%	2%
Arizona	2%	1%	2%	2%	2%
Utah	1%	3%	1%	1%	1%
<b>Pacific</b>	<b>23%</b>	<b>32%</b>	<b>50%</b>	<b>16%</b>	<b>16%</b>
California	17%	25%	24%	13%	12%
Washington	3%	5%	20%	2%	2%
Oregon	3%	3%	6%	1%	1%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Table 42. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## 2. Personal and Household Characteristics

### Age & Gender

While every age group is represented among Cyclists and Mountain Bikers, there are stark contrasts between them.

- **Mountain Bikers** tend to be concentrated at the younger end of the age spectrum. About 1-in-5 of them are young adults (18 to 24 years; 19%), and 1-in-3 are between 25 to 34 years of age (27%). One-quarter are in their mid-thirties to mid-forties (24%), nearly one-fifth are in their mid-forties to mid-fifties (17%) and one-eighth are in their mid-fifties to mid-sixties. Only 1-in-50 Mountain Bikers are 65 years of age or older (2%) (see Table 2).
- **Cyclists**, in contrast, are concentrated at the older end of the age spectrum. One-quarter of these tourists are 55 years of age or over (25%) and close to one-third are between the ages of 45 to 54 years of age (32%) and fewer than 1-in-10 are between the ages of 18 to 24 years (10%). Close to half of Cyclists are in the 35 to 54 year age group (48%).
- Men (58%) are somewhat more likely to be **Cyclists** than are women (42%), with a similar distribution of ages 45 to 54 years for both genders (18% Males; 14% Females). However, there is almost double the amount of male cyclists (22%) aged 25 to 45 years, than female cyclists (12%).<sup>14</sup>
- **Mountain Bikers** are predominately male (74%), with woman representing only one quarter of the market (26%). One-third of male Mountain Bikers are between the ages of 18 and 34 years (33%) and over one-quarter are between 35 to 54 years of age (28%). There are much fewer female (7%) than male (24%) Mountain Bikers aged 45 years and older.<sup>15</sup>

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<sup>14</sup> See Detailed Tables, Volume 2, Table 38.

<sup>15</sup> See Detailed Tables, Volume 2, Table 38.

TABLE 2: AGE & GENDER	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists		U.S. Population
	Total	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(681)	(328)	(1,706)	(45,697)	(60,649)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000	222,846,000
<b>Age</b>					
18 – 24 Years	10%	19%	6%	11%	11%
25 – 34 Years	17%	27%	15%	21%	20%
35 – 44 Years	16%	24%	14%	17%	16%
45 – 54 Years	32%	17%	21%	21%	21%
55 – 64 Years	16%	12%	21%	16%	16%
65+ Years	10%	2%	24%	14%	17%
<b>Gender</b>					
<b>Men</b>					
18 – 34 Years	58%	74%	53%	49%	48%
35 – 54 Years	15%	33%	11%	16%	16%
55+ Years	28%	28%	20%	18%	18%
<b>Women</b>					
18 – 34 Years	42%	26%	47%	52%	52%
35 – 54 Years	12%	12%	10%	16%	15%
55+ Years	19%	12%	16%	20%	19%
55+ Years	11%	2%	21%	15%	17%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, Table 38. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

### **Race, Education, Occupation, and Income**

Almost all American Cyclists and Mountain Bikers, like tourists who live in the U.S. as a whole, are white. Compared to the U.S. adult population as a whole, Cyclists and Mountain Bikers tend to be university graduates and to have higher incomes (see Table 3). The two cycling-oriented segments differ somewhat in terms of education and labour force participation.

- Specifically, nearly 3-in-5 Cyclists have a university degree (58%) but just over 1-in-2 Mountain Bikers are university educated (51%).
- Not surprisingly in light of the age differences between the two groups, more Cyclists are likely to live in households with at least one person occupying an executive, managerial or professional position (36%) than are Mountain Bikers (27%); while Cyclists are more likely to be retirees (11%) than Mountain Bikers (6%).

Despite their differences in age and education, Cyclists and Mountain Bikers are quite similar to one another with respect to household incomes. Both groups represent a broad range of incomes. Almost one-third report household incomes under \$60,000 (32% Cyclists; 33% Mountain Bikers), one-third are in the \$60,000 to under \$100,000 bracket (34% each), and one-third fall within the more affluent \$100,000+ bracket (34% each).

Tourists in these niche markets tend to be more highly educated, more apt to occupy professional or managerial positions and to be more affluent than are typical American pleasure tourists. They more closely resemble the typical U.S. tourist to British Columbia, rather than the U.S. adult population as a whole, when it comes to education and income.

TABLE 3: RACE, EDUCATION, OCCUPATION, INCOME	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists		U.S.
			To British Columbia	Any Destination	Population (18+ Years)
Unweighted base	(681)	(328)	(1,706)	(45,697)	(60,649)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000	222,846,000
<b>Race</b>					
White	88%	90%	87%	86%	84%
African American	3%	2%	2%	6%	7%
Asian American	2%	3%	4%	2%	2%
Other/Not stated	7%	6%	7%	6%	7%
<b>Education</b>					
High school diploma or less	8%	12%	9%	20%	26%
Some post-secondary	23%	27%	23%	29%	29%
Post-secondary diploma or certificate	9%	7%	9%	10%	10%
University degree+	58%	51%	56%	39%	33%
<b>Labour Force Participant<sup>1</sup></b>					
	73%	75%	62%	66%	61%
<b>Retirees</b>					
	11%	6%	26%	15%	16%
<b>Executive/Manager /Professional<sup>2</sup></b>					
	36%	27%	32%	30%	26%
<b>Household Income<sup>3</sup></b>					
Under \$40,000	18%	19%	14%	27%	36%
\$40,000 - \$59,999	15%	14%	16%	19%	18%
\$60,000 - \$99,999	34%	34%	31%	30%	26%
\$100,000 - \$149,999	22%	18%	22%	16%	12%
\$100,000+	34%	34%	39%	24%	20%
\$150,000+	12%	16%	17%	8%	6%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4 Tables 34, 35, 36, 37. <sup>1</sup> "Labour force participant" includes working full time, part time and self-employed. <sup>2</sup> Male or female head of household. <sup>3</sup> Note: 2005 household incomes have been re-percentage on total stating an income (US\$). "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

### 3. Life Stage

Consistent with their ages, **Mountain Bikers** are *young couples* (22%) and *parents* (44%) or, much less commonly, are *single* (15%) (see Table 4). They live in households of three people, on average. Their concentration in the *parenting* years and their larger household sizes differentiate **Mountain Bikers** from American tourists with recent travel experiences in British Columbia.

**Cyclist's** life stages differ from **Mountain Bikers** in a manner consistent with **Cyclist's** age, as a market with many people who are 45 years of age or over, **Cyclist's** are more apt to be *working older couples* (15%) or *young couples* (12%). Their life stage more closely resembles those of *all* American tourists than is the case for Mountain Bikers. They are, however, more likely to be *older singles* or *any parents* and to live in larger households than are *typical* tourists to British Columbia.

TABLE 4: HOUSEHOLD CHARACTERISTICS	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<b>HOUSEHOLD SIZE</b>				
1 person	12%	15%	14%	12%
2 people	34%	31%	46%	34%
3 person	19%	22%	15%	19%
4 people	21%	16%	14%	20%
5+ people	13%	15%	9%	14%
Average (all ages)	2.9	2.9	2.6	3.0
<b>LIFESTAGE<sup>1</sup></b>				
Young singles	4%	8%	3%	3%
Middle singles	8%	6%	7%	6%
Older singles	1%	1%	4%	3%
Young couple	12%	22%	12%	11%
Working older couple	15%	9%	18%	13%
Retired older couple	8%	3%	16%	9%
Young parent	10%	10%	7%	13%
Middle parent	10%	9%	5%	11%
Older parent	29%	26%	23%	28%
Any singles	12%	15%	14%	12%
Any couples	35%	33%	46%	34%
Any parent	48%	44%	35%	51%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Tables 39, 41.

<sup>1</sup>TNS definitions for these groups are appended to this report. No cross editing with other household composition variables was performed by Research Resolutions. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. Percentages do not add to 100% because some respondents refrained from answering the question.

## V. Competitive Destinations

### A. Worldwide Destinations for Overnight Pleasure Trips

When asked to identify the destinations of the overnight pleasure trips they took over a two-year period, virtually all Cyclists and Mountain Bikers indicated that they have taken recent vacations within the U.S.A. and nearly half of each group claim to travel *only* within their own country (48% each) (see Table 5). 1-in-4 of them have been to Canada on a recent overnight pleasure trip (26% Cyclists; 24% Mountain Bikers), suggesting that Canada is a particularly attractive destination for these cycling and mountain biking enthusiasts. This is significantly higher than the 1-in-7 U.S. pleasure tourists as a whole who have been to Canada recently (13%).

While especially successful in attracting Cyclists and Mountain Bikers vis à vis the general travelling public in the U.S., Canada shares this distinction with other foreign destinations. Cyclists and Mountain Bikers are simply more apt to travel outside the U.S.A. than are Americans in general.

Canada clearly leads the market (at 26%) but other foreign competitive destinations for Cyclists and Mountain Bikers include *Mexico* (19% Cyclists; 21% Mountain Bikers), *Europe* (16% Cyclists; 14% Mountain Bikers), and the *Caribbean* (13% Cyclists; 12% Mountain Bikers).

#### Note to Readers

Activities and locations visited are *independent* of one another.

In other words, American Cyclists and Mountain Bikers claim to have taken an overnight trip motivated by cycling in the past two years or so and to have taken overnight pleasure trips to specific destinations but TAMS does not provide information that links the activities to the destination(s) visited. Thus, Cyclists and Mountain Bikers may or may not have participated in cycling activities in a particular country, province or state they have visited recently for an overnight pleasure trip.



TABLE 5: COMPETITIVE DESTINATIONS WORLDWIDE*	Cyclists	Mountain Bikers	All U.S. Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<b>Canada</b>	<b>26%</b>	<b>24%</b>	<b>100%</b>	<b>13%</b>
<b>U.S.A.</b>	<b>100%</b>	<b>99%</b>	<b>100%</b>	<b>98%</b>
<b>Other Countries (NET)</b>	<b>40%</b>	<b>40%</b>	<b>52%</b>	<b>26%</b>
Mexico	19%	21%	27%	11%
Europe	16%	14%	21%	7%
Caribbean	13%	12%	24%	11%
Asia	6%	4%	7%	2%
South/Central America	5%	5%	9%	3%
Africa	2%	1%	2%	1%
Australia/New Zealand	2%	2%	3%	1%
<b>Destination patterns</b>				
<b>Only U.S.A.</b>	<b>48%</b>	<b>48%</b>	-	<b>67%</b>
U.S.A. & Canada only	13%	12%	48%	7%
U.S.A. & Mexico only	7%	10%	-	5%
U.S.A. & Canada & Other Countries	13%	12%	51%	5%
U.S.A. & Other Countries only (not Canada or Mexico)	14%	13%	-	11%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Table 47.  
 \*Locations visited on overnight pleasure trip, past two years. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. \*\*Less than 0.5%.

## B. Canadian Destinations

Approximately 1-in-4 Cyclists and Mountain Bikers have had some travel experience in British Columbia over a ten-year period (23% and 22%, respectively) and about half this proportion, or 1-in-10, are recent pleasure tourists in the province 10% Cyclists; 13% Mountain Bikers; (see Table 6). As noted earlier, however, these recent British Columbia tourists may or may not have gone cycling or mountain biking in British Columbia or any other specific destination they claim to have visited recently.

**Ontario** is the principle Canadian competitor for American Cyclists. Over a two-year period, this central Canadian province attracted 1-in-7 Cyclists (15%) compared to **British Columbia's** 1-in-10 (10%). However, for Mountain Bikers, Ontario only attracts 1-in-10 (10%) whilst British Columbia attracts a higher proportion, 1-in-8 (or 13%). **British Columbia** is an attractive destination for Mountain Biking enthusiasts.

TABLE 6: COMPETITIVE CANADIAN DESTINATIONS*	Cyclists	Mountain Bikers	All U.S. Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<b>British Columbia</b>				
Any purpose, past 10 years	23%	22%	100%	9%
Any purpose, past 2 years	12%	15%	100%	4%
<b>Pleasure, past 2 years</b>	<b>10%</b>	<b>13%</b>	<b>100%</b>	<b>3%</b>
<b>Overnight Pleasure Trips in Past 2 Years to . . .</b>				
Atlantic Canada	5%	2%	8%	2%
Quebec	6%	4%	9%	3%
Ontario	15%	10%	17%	7%
Man/Sask	**	1%	7%	1%
Alberta	2%	4%	15%	1%
Yukon	2%	2%	9%	**

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Table 47.

\*Locations visited on overnight pleasure trip, past two years. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. \*\*Less than 0.5%

### C. Out-of-State U.S. Pleasure Travel Destinations

To identify key competitive destinations *within* the U.S., this analysis focuses on **out-of-state** overnight pleasure travel by Cyclists and Mountain Bikers (see Table 7). Information on visitation by these travellers to *all* states, including their “home state” can be found in the detailed tabulations.<sup>16</sup>

Cyclists and Mountain Bikers are drawn from their home state to **sun/sea** destinations within the U.S., whether to go cycling and/or mountain biking or to engage in other tourism experiences. Collectively, these destinations, including Florida, California, and Nevada attract over two-thirds of Cyclists (67%) and Mountain Bikers (69%) for overnight pleasure trips. On a state-by-state basis, **Florida**, followed by **California**, **New York**, **Nevada** and **Colorado** are the most popular U.S. destinations for *Cyclists* when travelling outside their home state. Similar to Cyclists, **Florida** and **California** are the top destinations for *Mountain Bikers*, however **Nevada**, **Colorado** and **Arizona** rank higher than **New York State**. As such, these states represent stiff competition for British Columbia’s Cycling and Mountain Biking businesses.

To assess the impact of state residents travelling *within* their own state, the U.S. destination choices of Cyclists and Mountain Bikers are shown below *excluding* and *including* state residents for the U.S. market leaders. Not surprisingly, because of California’s sheer size and rich tourism product base, the impact is most obvious for this state.

<u>Destinations</u>	<u>Excluding State Residents</u>		<u>Including State Residents</u> <sup>17</sup>	
	<b>Cyclists</b>	<b>Mountain Bikers</b>	<b>Cyclists</b>	<b>Mountain Bikers</b>
Florida	27%	26%	30%	27%
<b>California</b>	<b>21%</b>	<b>24%</b>	<b>36%</b>	<b>46%</b>
New York State	19%	16%	24%	19%
Nevada	17%	24%	18%	24%
Colorado	17%	18%	19%	25%
Illinois	16%	13%	18%	14%
Pennsylvania	15%	12%	18%	14%
Arizona	14%	18%	16%	18%

When residents are included, California captures over one-third of the entire American Cycling market (36%) and nearly half of the Mountain Biking market (46%); on trips that may or may not have included going cycling and/or mountain biking. British Columbia will, needless to say, be competing with California as a cycling and

<sup>16</sup> See Volume 2, Table 47.

<sup>17</sup> See above.

mountain biking destination for California residents and for the Cyclists and Mountain Bikers who live in other U.S. states.

TABLE 7: OUT-OF-STATE U.S. DESTINATIONS* (Excluding "Own State")	Cyclists	Mountain Bikers	All U.S. Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<b>Sun/Sea States (S)</b>	<b>67%</b>	<b>69%</b>	<b>75%</b>	<b>54%</b>
<i>In rank order by Cyclists</i>				
Florida (S)	27%	26%	25%	23%
California (S)	21%	24%	32%	13%
New York State	19%	16%	19%	11%
Nevada (S)	17%	24%	28%	14%
Colorado	17%	18%	18%	7%
Illinois	16%	13%	14%	8%
Pennsylvania	15%	12%	12%	9%
Arizona (S)	14%	18%	23%	9%
Washington DC	14%	14%	13%	7%
North Carolina	12%	13%	9%	8%
Virginia	12%	11%	9%	7%
Massachusetts	12%	10%	11%	6%
Hawaii (S)	11%	13%	19%	6%
Michigan	11%	8%	9%	6%
New Jersey	11%	8%	8%	6%
Ohio	11%	11%	8%	7%
Georgia	10%	8%	9%	8%
Wisconsin	10%	7%	8%	5%
Tennessee	10%	10%	9%	9%
Maryland	10%	7%	9%	6%
Connecticut	10%	6%	6%	4%
Texas (S)	10%	11%	13%	7%
South Carolina (S)	10%	9%	7%	7%
New Mexico (S)	8%	10%	10%	4%
Utah	7%	14%	12%	4%
Oregon	7%	13%	26%	4%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Table 48.

\*Out-of-state locations visited on overnight pleasure trip, past two years. States displayed represent destinations visited by at least 10% of Cyclists and/or Mountain Bikers. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## D. Destinations: Roles & Ratings

### 1. Importance of Destination

As they say in retail, destination, destination, destination! For most U.S. Cyclists and Mountain Bikers the first consideration in planning their most recent summer and/or winter trip was **destination** (62%, each) (see Table 8). At the same time, about one-quarter of these tourists start their trip planning process with a focus on the **type of vacation experience** they wish to have (24% Cyclists; 28% Mountain Bikers) and about one-fifth begin with the **activities** they wish to participate in (23% Cyclists; 20% Mountain Bikers).

These levels of experience-driven and activity-driven planning are higher than is the case among typical U.S. tourists to British Columbia (19% and 16% respectively) or in the American travel market as a whole (20% and 13% respectively). While Cyclists and Mountain Bikers also put a premium on destination choice *per se*, with nearly 7-in-10 (69%, each), claiming that it is *extremely* or *very important* to them, destination is less important to them than it is to Americans with recent pleasure travel experience in British Columbia (73%).

TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<b>First Consideration for Most Recent Summer/Winter Trip (NET)*</b>				
Start with destination	62%	62%	72%	62%
Start with activities	24%	28%	16%	13%
Start with type of vacation experience	23%	20%	19%	20%
Look for package deal	2%	2%	3%	2%
<b>Importance of Destination</b>				
Extremely/Very Important	69%	69%	73%	67%
Extremely important	31%	32%	31%	29%
Very important	39%	37%	42%	39%
Average**	3.9	3.9	4.0	3.9

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Tables 22-3, & 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. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## 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.<sup>18</sup>

Cyclists and Mountain Bikers resemble American overnight pleasure travellers as a whole in terms of the conditions they accord *high importance* when selecting a destination. Like other American tourists, both Cyclists and Mountain Bikers put *feeling safe* at the top of their list (58% Cyclists; 56% Mountain Bikers) (see Table 9). Approximately half want *many things for adults to see and do* (54% Cyclists; 52% Mountain Bikers), and about 4-in-10 of them also want a destination with *convenient access by car* (45% Cyclists; 42% Mountain Bikers), and about 3-in-10 also place high importance on a destination that poses *no health concerns* (36% Cyclists; 33% Mountain Bikers).

While the conditions they impose on destination choices are very similar, there are some noteworthy differences between Cyclists and Mountain Bikers:

- Mountain Bikers are more apt to take into account the availability of *budget lodging* (30% Mountain Bikers; 27% Cyclists), as well as the availability of *camping facilities* (29% Mountain Bikers; 20% Cyclists) than are Cyclists.
- Mountain Bikers are also more interested in destinations that offer *lots for children to see and do* (21% Mountain Bikers; 17% Cyclists) and compared with Cyclists, they are more comfortable being *familiar with the culture and language* (20% Mountain Bikers; 15% Cyclists).
- Mountain Bikers are more apt to take into account *availability of information on the internet* than are Cyclists (38% Mountain Bikers; 27% Cyclists).
- The greater importance accorded the internet as a tool among Mountain Bikers, as well as their lodging preferences and having activities available for children, may be a function of their age and life stage. As younger tourists with children, Mountain Bikers can be expected to be more familiar with and reliant on the internet and to be travelling with children than are their older Cycling colleagues.

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<sup>18</sup> “Highly important”, “Somewhat important”, and “Of no importance”.

**Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 Cyclists/  
Mountain Bikers<sup>19</sup>**

	<u>Cyclists</u>	<u>U.S. Pleasure Tourists</u>		
		<u>Mountain Bikers</u>	<u>To British Columbia</u>	<u>Total</u>
Feeling safe	58%	56%	67%	73%
Lots for adults to see/do	54%	52%	50%	48%
Convenient access by car	45%	42%	35%	51%
No health concerns	36%	33%	40%	43%
Mid Range accommodation	29%	31%	37%	33%
Information available on internet	27%	38%	28%	28%
Budget accommodation	27%	30%	22%	29%
Familiar with culture & language	15%	20%	12%	23%

Availability of *mid range* and *budget accommodation* is a salient factor in a destination choice for about 3-in-10 Cyclists and Mountain Bikers, and having *low cost package deals* available for the destination is rated highly important by 28% of Cyclists and Mountain Bikers.

<sup>19</sup> See Table 9 for full array of considerations deemed “highly important” and “of no importance”.

TABLE 9: CONDITIONS FOR SELECTING A DESTINATION	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<b>Bold rows are proportion stating "Highly Important".</b>				
<i>In rank order by Cyclists</i>				
<b>Feeling safe</b>	<b>58%</b>	<b>56%</b>	<b>67%</b>	<b>73%</b>
Of no importance	5%	5%	2%	2%
<b>Lots for adults to see/do</b>	<b>54%</b>	<b>52%</b>	<b>50%</b>	<b>48%</b>
Of no importance	5%	4%	4%	5%
<b>Convenient access by car</b>	<b>45%</b>	<b>42%</b>	<b>35%</b>	<b>51%</b>
Of no importance	7%	10%	12%	7%
<b>No health concerns</b>	<b>36%</b>	<b>33%</b>	<b>40%</b>	<b>43%</b>
Of no importance	17%	18%	14%	14%
<b>Mid-range accommodation</b>	<b>29%</b>	<b>31%</b>	<b>37%</b>	<b>33%</b>
Of no importance	17%	23%	9%	13%
<b>Low cost packages available</b>	<b>28%</b>	<b>28%</b>	<b>21%</b>	<b>32%</b>
Of no importance	19%	23%	26%	18%
<b>Information available on internet</b>	<b>27%</b>	<b>38%</b>	<b>28%</b>	<b>28%</b>
Of no importance	20%	15%	23%	24%
<b>Budget accommodation</b>	<b>27%</b>	<b>30%</b>	<b>22%</b>	<b>29%</b>
Of no importance	22%	20%	27%	21%
<b>Direct access by air</b>	<b>26%</b>	<b>24%</b>	<b>34%</b>	<b>26%</b>
Of no importance	23%	26%	14%	25%
<b>Camping</b>	<b>20%</b>	<b>29%</b>	<b>9%</b>	<b>8%</b>
Of no importance	44%	33%	63%	65%
<b>Lots for children to see/do</b>	<b>17%</b>	<b>21%</b>	<b>10%</b>	<b>20%</b>
Of no importance	61%	58%	71%	55%
<b>Familiar with culture &amp; language</b>	<b>15%</b>	<b>20%</b>	<b>12%</b>	<b>23%</b>
Of no importance	22%	24%	24%	17%
<b>Very different culture than own</b>	<b>14%</b>	<b>18%</b>	<b>11%</b>	<b>8%</b>
Of no importance	35%	30%	34%	48%
<b>Great shopping</b>	<b>11%</b>	<b>9%</b>	<b>11%</b>	<b>16%</b>
Of no importance	46%	48%	44%	36%
<b>Have friends or relatives there</b>	<b>10%</b>	<b>11%</b>	<b>7%</b>	<b>14%</b>
Of no importance	63%	61%	64%	55%
<b>Luxury accommodation</b>	<b>9%</b>	<b>7%</b>	<b>9%</b>	<b>9%</b>
Of no importance	60%	55%	48%	54%
<b>Convenient access by train/bus</b>	<b>9%</b>	<b>7%</b>	<b>9%</b>	<b>8%</b>
Of no importance	48%	51%	45%	54%
<b>Disabled-person-friendly</b>	<b>7%</b>	<b>8%</b>	<b>8%</b>	<b>9%</b>
Of no importance	80%	82%	77%	71%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Tables 25-1 to 25-6. **Bold rows** are proportion stating "Highly Important". "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.



### 3. Appeal of Various Destinations

American Cyclists and Mountain Bikers are most enthusiastic about **Hawaii** as an *appealing destination* for pleasure travel. Cyclists accord this tropical state a rating of 8.4 and Mountain Bikers an even higher rating of 8.7 on a ten-point scale (see Table 10).<sup>20</sup> Though significantly lower than Hawaii's, moderately favourable ratings are accorded a host of destinations, including **Colorado** (7.8 Cyclists; 8.0 Mountain Bikers), **California** (7.7 Cyclists; 8.0 Mountain Bikers), **British Columbia** (7.4 Cyclists; 7.1 Mountain Bikers), **Arizona** (7.3 Cyclists; 6.9 Mountain Bikers), and **Florida** (7.1 Cyclists; 7.2 Mountain Bikers).

**British Columbia** is rated higher than New York State and Arizona and *any* other Canadian province or territory by Cyclists (7.4) and among Mountain Bikers (7.1). Among Cyclists, British Columbia has a higher rating than Florida but among Mountain Bikers it is rated marginally lower. Despite British Columbia's success among those offering an appraisal, it is important to note that about one-fifth of U.S. Cyclists and Mountain Bikers refrain from rating the province, presumably because they know too little about the destination to offer an opinion about its touristic appeal.

It is interesting to note that U.S. Cyclists gave the same rating to **Prince Edward Island** (6.9), as to New York State (6.9) and amongst all Canadian provinces and territories it is rated second to British Columbia. This could be due in part to Prince Edward Island being known as a cycling friendly and a family oriented destination.

#### Summary: Highest Appeal Destinations among Cyclists and/or Mountain Bikers<sup>21</sup>

	Cyclists	U.S. Pleasure Tourists		
		Mountain Bikers	To British Columbia	Total
Hawaii	8.4	8.7	8.5	8.4
Colorado	7.8	8.0	7.5	7.1
California	7.7	8.0	7.8	7.3
<b>British Columbia</b>	<b>7.4</b>	<b>7.1</b>	<b>8.7</b>	<b>6.2</b>
Arizona	7.3	6.9	7.0	6.6
Florida	7.1	7.2	6.8	7.3
New York State	6.9	6.9	7.0	6.6
Prince Edward Island	6.9	6.2	6.9	5.6

<sup>20</sup> 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. The second question associated with reasons to travel to a destination is discussed in the following chapter. Many potential tourists refrained from offering opinions about the Canadian destinations included in this question, presumably because they did not have sufficient information about the destination to form a clear image.

<sup>21</sup> See Table 10 for full array of average ratings and proportion unable/unwilling to rate each destination.

The impact of direct experience with a destination seems to play a role in American consumers' appraisals. For example, among Americans who have recently travelled to British Columbia, the province's overall appeal rating is dramatically higher (8.7) than that volunteered by Cyclists (7.4), Mountain Bikers (7.1), or all U.S. pleasure travellers (6.2), most of whom have no direct experience with British Columbia.

Among Cyclists and Mountain Bikers *who have been to British Columbia in the past two years or so*, the province achieves a rating of 8.7, surpassing Hawaii.<sup>22</sup> The challenge, of course, is getting these cycling enthusiasts back to the province!

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<sup>22</sup> See detailed tables, Volume 2, Table 26-10 for figures. Note: the ratings include *both* Cyclists and Mountain Bikers (NET).

TABLE 10: APPEAL OF VARIOUS DESTINATIONS

	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<i><b>Bold rows are average ratings*</b></i>				
<b>British Columbia</b>	<b>7.4</b>	<b>7.1</b>	<b>8.7</b>	<b>6.2</b>
No rating provided	19%	18%	2%	31%
<b>Newfoundland &amp; Labrador</b>	<b>5.9</b>	<b>5.5</b>	<b>6.0</b>	<b>4.8</b>
No rating provided	32%	34%	29%	42%
<b>Nova Scotia</b>	<b>6.6</b>	<b>5.9</b>	<b>6.7</b>	<b>5.5</b>
No rating provided	25%	29%	24%	35%
<b>New Brunswick</b>	<b>5.9</b>	<b>5.2</b>	<b>6.1</b>	<b>4.9</b>
No rating provided	35%	37%	31%	43%
<b>Prince Edward Island</b>	<b>6.9</b>	<b>6.2</b>	<b>6.9</b>	<b>5.6</b>
No rating provided	28%	30%	25%	38%
<b>Quebec</b>	<b>6.6</b>	<b>6.4</b>	<b>6.8</b>	<b>5.8</b>
No rating provided	17%	20%	18%	28%
<b>Ontario</b>	<b>6.7</b>	<b>6.3</b>	<b>6.8</b>	<b>6.1</b>
No rating provided	14%	19%	19%	25%
<b>Manitoba</b>	<b>5.6</b>	<b>5.3</b>	<b>5.6</b>	<b>4.7</b>
No rating provided	32%	37%	31%	43%
<b>Saskatchewan</b>	<b>5.6</b>	<b>5.3</b>	<b>5.6</b>	<b>4.8</b>
No rating provided	30%	31%	29%	42%
<b>Alberta</b>	<b>6.3</b>	<b>6</b>	<b>6.8</b>	<b>5.2</b>
No rating provided	26%	25%	22%	38%
<b>Yukon</b>	<b>6.2</b>	<b>6.2</b>	<b>6.3</b>	<b>5.1</b>
No rating provided	26%	29%	24%	37%
<b>Northwest Territories</b>	<b>6.2</b>	<b>6.2</b>	<b>6.1</b>	<b>5.1</b>
No rating provided	26%	30%	26%	36%
<b>New York State</b>	<b>6.9</b>	<b>6.9</b>	<b>7.0</b>	<b>6.6</b>
No rating provided	4%	7%	8%	10%
<b>Colorado</b>	<b>7.8</b>	<b>8.0</b>	<b>7.5</b>	<b>7.1</b>
No rating provided	7%	8%	8%	11%
<b>Florida</b>	<b>7.1</b>	<b>7.2</b>	<b>6.8</b>	<b>7.3</b>
No rating provided	4%	7%	6%	6%
<b>California</b>	<b>7.7</b>	<b>8.0</b>	<b>7.8</b>	<b>7.3</b>
No rating provided	4%	5%	3%	7%
<b>Hawaii</b>	<b>8.4</b>	<b>8.7</b>	<b>8.5</b>	<b>8.4</b>
No rating provided	6%	6%	5%	8%
<b>Arizona</b>	<b>7.3</b>	<b>6.9</b>	<b>7.0</b>	<b>6.6</b>
No rating provided	6%	6%	6%	10%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Tables 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. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

#### 4. Number of Good Reasons to Visit Various Destinations

Not too surprisingly, the *same* destinations accorded high *appeal* ratings are also the ones that emerge at the top of Cyclists’ and Mountain Bikers’ lists for having *many good reasons* to visit on a pleasure trip (see Table 11).<sup>23</sup> Specifically, **Hawaii** tops the list with almost 2-in-3 Cyclists and 3-in-4 Mountain Bikers stating that there are *many good reasons* to go to this tropical destination.

Led by Hawaii; California, Colorado, and Florida surpass British Columbia as a destination with many reasons to visit according to Cyclists and Mountain Bikers. However, **British Columbia** is sixth on the list for Cyclists and fifth for Mountain Bikers, with 42% each claiming that there are *many good reasons* to go to this province. In fact, British Columbia surpasses all other Canadian destinations as well as Arizona and New York State (for Mountain Bikers not Cyclists), as a destination that offers Cyclists and Mountain Bikers *many good reasons* to visit.

**Summary: Destinations with At Least One-Half Saying *Many Good Reasons* to Visit (in rank order within each category)<sup>24</sup>**

		U.S. Pleasure Tourists					
		<u>Mountain Bikers</u>		<u>To British Columbia</u>		<u>Total</u>	
<u>Cyclists</u>							
Hawaii	66%	Hawaii	75%	<b>B.C.</b>	<b>73%</b>	Hawaii	67%
California	60%	California	68%	Hawaii	72%	Florida	54%
Colorado	54%	Colorado	53%	California	63%	California	53%
Florida	51%						
.....		Less than One-Half		.....			
New York	45%	Florida	49%			Colorado	41%
<b>B.C.</b>	<b>42%</b>	<b>B.C.</b>	<b>42%</b>			New York State	40%
		New York	41%			Arizona	31%
						<b>B.C.</b>	<b>21%</b>

Among Cyclists and Mountain Bikers who have recently travelled to British Columbia, however, over 8-in-10 say that there are many good reasons to go (81%).<sup>25</sup> As with the *appeal* rating discussed in the previous chapter, the province has a much more favourable image among those who have experienced what it can offer.

<sup>23</sup> 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*.

<sup>24</sup> See Table 11 for the full array of ratings. Note: to display British Columbia in the rank order sequence, some destinations beneath the 50% threshold are shown.

<sup>25</sup> See Detailed Tables, Volume 2, Table 27-4. Includes Cyclists and Mountain Bikers (NET).

TABLE 11: NUMBER OF REASONS TO VISIT VARIOUS DESTINATIONS	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<i>% stating "MANY" good reasons to visit</i>				
<b>British Columbia</b>	<b>42%</b>	<b>42%</b>	<b>73%</b>	<b>21%</b>
<i>Rank order among Cyclists</i>				
Hawaii	66%	75%	72%	67%
California	60%	68%	63%	53%
Colorado	54%	53%	46%	41%
Florida	51%	49%	45%	54%
New York State	45%	41%	47%	40%
Arizona	41%	33%	35%	31%
Ontario	32%	23%	28%	20%
Quebec	31%	25%	33%	18%
Prince Edward Island	26%	20%	25%	13%
Nova Scotia	26%	19%	25%	13%
Yukon	23%	23%	23%	11%
Alberta	23%	18%	27%	10%
Northwest Territories	22%	21%	20%	11%
Newfoundland & Labrador	17%	15%	16%	8%
New Brunswick	15%	12%	16%	7%
Saskatchewan	13%	13%	10%	6%
Manitoba	12%	11%	9%	5%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Tables 27. Proportions are those stating MANY good reasons to visit. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## VI. Activities On 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*.<sup>26</sup>

#### Not Necessarily in Canada or British Columbia

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 motivated by **going cycling and or mountain biking** in the past two years, these activities are not linked to any specific destination these tourists claim to have visited over the same time period. Thus, a trip prompted by cycling and or mountain biking could have taken place in many parts of British Columbia, other Canadian provinces and across the U.S.A. Similarly, the park for a camping experience could have been Pacific Rim, Glacier, Death Valley, Grand Canyon, or any other park in the world; a winery could have been in the Okanagan Valley, Napa, Niagara or Bordeaux.

#### “Main Reason” and “Any Participation”

Tourists who indicate that a particular activity is the *main reason for taking a trip* are, in effect, expressing a much more significant commitment to the activity than are those who say they engaged in a particular activity on at least one of the overnight trips they took recently. In the following section, information is presented for selected individual or groups of related activities that *drive* Cyclists and Mountain Bikers to take overnight pleasure trips (*main reason*) and the level of *any* participation in these same activities.

Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Cyclists and Mountain Bikers provided in this chapter are appended. For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

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<sup>26</sup> Presumably, “these trips” are those on which the specific activity took place.

## **B. Trip Activities & Drivers**

### **1. Cyclists' and Mountain Bikers' Cross-Over with Other Trip Activity Sectors**

As demonstrated by their representation in other activity-based tourism sectors, Cyclists and Mountain Bikers are multi-dimensional travellers.<sup>27</sup>

#### **Cyclists**

About one-third of Cyclists are also **Hikers, History/Heritage Tourists** and/or **Campers/RVers**, nearly one-quarter are **Alpine Skiers** and over one-fifth are **Anglers** and/or **Travellers on Self-Guided Overnight Tours** (see Table 12).

By indexing the share of Cyclists in each other activity sector to the American pleasure market in total, Cyclists' predisposition toward outdoor activities becomes clear (see Index, based on the share of Cyclists in each other activity sector relative to the American pleasure market in total).

- Compared to the U.S. travelling public as a whole, Cyclists are ten times as likely to be Sea Kayakers and Nordic Skiers.
- They are more than six times as likely to be River Rafters, Snowmobilers and Hikers, than the U.S. travelling public as a whole.
- Cyclists are five times as likely to be Divers/Snorkellers.
- They are also more than three times as likely as the U.S. travelling public as a whole, to take trips in order to be Backcountry Lodge Guests, go Alpine Skiing, or to obtain Aboriginal cultural experiences, as well as go golfing and/or camping/RVing
- Cyclists are more than twice as likely to take trips to go fishing or obtain history and heritage experiences than is the American travelling public as a whole.

#### **Mountain Bikers**

Nearly one-half of Mountain Bikers are also **Hikers**, over one-third are **Campers and RVers, Alpine Skiers** and/or **History/Heritage Tourists**, about one-quarter are **Travellers on Self-Guided Overnight Tours** and/or **Divers/Snorkellers** and about one-fifth are **Anglers** (see Table 12).

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<sup>27</sup> Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Cyclists and Mountain Bikers provided in this chapter are appended. For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

Like Cyclists, Mountain Bikers are however, more apt than the U.S. travelling public as a whole to be members of *other* activity-based segments:

- Mountain Bikers are twenty times as likely to be Sea Kayakers.
- They are more than ten times as likely to be River Rafters, and/or Nordic Skiers.
- They are more than six times as likely to be Divers/Snorkellers, Hikers, Alpine Skiers and Snowmobilers.
- They are five times as likely to be Backcountry Lodge Guests.
- They are also more than three times as likely as the U.S. travelling public as a whole, to take trips in order to obtain Aboriginal cultural experiences, to go camping/RVing and to go golfing.
- Mountain Bikers are more than twice as likely to take trips to go fishing or obtain history and heritage experiences and to take self-guided overnight tours, than are the American travelling public as a whole.



TABLE 12: CROSS-OVER WITH OTHER SELECTED TRIP ACTIVITY SECTORS	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists			
			To British Columbia	Any Destination	Index to All U.S. Tourists**	
	Total	Total			Cyclists	Mountain Bikers
Unweighted base	(681)	(328)	(1,706)	(45,697)		
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000		
<i>Rank order among Cyclists</i>						
Cyclists	100%	35%	4%	1%	N/A	3,500
Mountain Bikers	17%	100%	3%	1%	1,700	N/A
Hikers	36%	45%	11%	6%	600	750
History and Heritage Tourists	36%	34%	22%	14%	257	243
Campers/RVers	33%	39%	16%	11%	300	355
Alpine Skiers	23%	37%	13%	6%	383	617
Anglers	22%	21%	11%	8%	275	263
Self-Guided Overnight Touring Travellers	21%	24%	26%	11%	191	218
Divers & Snorkellers	15%	23%	7%	3%	500	767
Nordic Skiers	13%	12%	5%	1%	1,300	1,200
Golfers	12%	12%	7%	4%	300	300
Aboriginal Activity Tourists	11%	11%	9%	3%	367	367
River Rafter	9%	14%	3%	1%	900	1,400
Backcountry Lodge Guests	9%	10%	4%	2%	450	500
Snowmobilers	6%	6%	2%	1%	600	600
Sea Kayakers	4%	6%	1%	*	1,333	2,000

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Tables 1-1 and 1-2. \*Less than 0.5%. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. These sectors were selected by Tourism British Columbia for the purposes of this report. This list does not represent the full range of sectors in the British Columbian tourism industry \*\*Index calculation: Percentage Cyclists and Mountain Bikers in activity sector divided by All U.S. Pleasure (Any Destination) in activity sector, multiplied by 100.

## 2. Major Trip Activity Groups

Like most tourists, Cyclists and Mountain Bikers take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.<sup>28</sup>

- In addition to taking trips in order to go cycling or mountain biking nearly three-quarters of Cyclists (73%) and four-fifths of Mountain Bikers (80%) take trips in order to engage in at least one **water-based outdoor activity**.<sup>29</sup>
- Over half of Cyclists and Mountain Bikers have taken trips motivated by **cultural** interests such as going to well-known historic sites, museums, or cultural performances and two-fifths have taken recent overnight pleasure trips in order to engage in **entertainment** activities such as theme parks, casinos and movies.
- **Outdoor winter activities** are more apt to be trip motivators for Mountain Bikers (47%) than they are for Cyclists (36%). The *younger* Mountain Bikers are more likely to take trips in order to engage in an **outdoor winter activity** (55%) than are older Cyclists (44%).
- Over one-third of Cyclists and Mountain Bikers are motivated by **dining and wine-related** experiences as well as **Fairs and Festivals**.
- Staying in a seaside or lakeside **resort** or spa or going to **spectator sporting events** such as professional baseball or football games, as reasons for taking a trip, is characteristic of 3-in-10 Cyclists and nearly 4-in-10 Mountain Bikers.

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, more Cyclists and Mountain Bikers *participated* in at least one cultural or learning activity while on a recent overnight pleasure trip (83% Cyclists; 82% Mountain Bikers) than claim to have taken a trip motivated by one of these activities (52% Cyclists; 51% Mountain Bikers). However, when it comes to water based activities the difference between *participation* rates (9-in-10) and *motivation* rates (nearly 8-in-10) is not as great as compared to the other categories.

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<sup>28</sup> Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Cyclists and Mountain Bikers provided in this chapter are appended. For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

<sup>29</sup> All Cyclists and Mountain Bikers are included in the *land-based outdoor activity segment* because "cycling" is one of the activities used to define members of this group. Other key activities included in the *land-based* segment include hiking, bird watching and viewing land-based animals.

Food and wine experiences are especially likely to be “one-of-many” trip activities (88% Cyclists; 86% Mountain Bikers) but the driving force behind a trip for relatively few segment members (35% Cyclists; 38% Mountain Bikers). Similarly, about two-thirds of Cyclists and Mountain Bikers went to a festival or fair on a recent trip but only one-third of them took the trip in order to do so.

Compared to *all* U.S. overnight pleasure travellers, Cyclists and Mountain Bikers are five times as likely to identify outdoor winter activities, three times as likely to identify outdoor land-based activities and about twice as likely to identify the water-based activities, as ones that *motivated* recent trips (main reason).

<u>Major Activity Group</u>	<u>Main Reason</u>			<u>Any Participation</u>		
	<b>Cyclists</b>	<b>Mountain Bikers</b>	All U.S.	<b>Cyclists</b>	<b>Mountain Bikers</b>	All U.S.
			Pleasure Tourists			Pleasure Tourists
Outdoor Land Based	100%	100%	30%	100%	100%	63%
Outdoor Water-Based	73%	80%	30%	89%	91%	56%
Cultural/Learning & Events	52%	51%	23%	83%	82%	61%
Theme/Amusement Parks	40%	45%	22%	59%	65%	43%
Outdoor Winter Activities	36%	47%	8%	44%	55%	12%

See Table A1, appended, for additional figures and comparisons to U.S. tourists with recent travel experience in British Columbia.

TABLE 13: MAJOR ACTIVITY GROUPS – MAIN & ANY	Cyclists		Mountain Bikers	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(681)	(681)	(328)	(328)
Weighted, Projected	2,231,000	2,231,000	1,055,000	1,055,000
<i>Rank order among Cyclists - Main Reason</i>				
<b>Outdoor Land Based Activities</b>	100%	100%	100%	100%
<b>Outdoor Water Based Activities</b>	73%	89%	80%	91%
<b>Cultural/Learning Activities &amp; Events</b>	52%	83%	51%	82%
<b>Theme/Amusement Parks/Movies</b>	40%	59%	45%	65%
<b>Outdoor Winter Activities</b>	36%	44%	47%	55%
<b>Food &amp; Wine</b>	35%	88%	38%	86%
<b>Fairs/Festivals</b>	34%	65%	37%	64%
<b>Resorts</b>	33%	58%	38%	58%
<b>Spectator Sports</b>	30%	45%	36%	51%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 2, Tables 2 to 11.

### 3. Individual Trip Activities: The Outdoors

Many outdoor experiences are popular among Cyclists and Mountain Bikers (see Table 14).<sup>30</sup> Although they particularly enjoy land-based activities they are also partial to water-based activities. They like to be active while on vacation but they also enjoy taking time to enjoy themselves and relax in nature. Mountain Bikers are more apt to be motivated by and participate in more rigorous outdoor activities, than are Cyclists.

#### *Land Based Activities:*

- **Mountain Bikers** are especially interested in land-based travel experiences as motivations for recent overnight pleasure trips, about 4-in-10 go hiking, take trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them, and/or go alpine skiing, and just under 3-in-10 take trips to go climbing.
- **Cyclists** are similar to Mountain Bikers in that approximately 4-in-10 take trips to visit a national, provincial or state nature parks. However, a higher percentage of Cyclists take trips to visit well-known natural wonders, to view flora and fauna and go jogging compared to Mountain Bikers. Similarly, a lower percentage of Cyclists are motivated by camping, climbing, alpine skiing and hiking when compared to Mountain Bikers.

#### *Water based Activities:*

- Water based activities are also popular motivations for recent overnight pleasure trips for **Mountain Bikers**, nearly 3-in-10 enjoying sunbathing or sitting on a beach and swimming in oceans, whilst 2-in-10 enjoy diving/snorkelling, swimming in lakes, motor/sail boating, fishing, especially in fresh water or kayaking/canoeing.
- **Cyclists** are similar to Mountain Bikers in that 3-in-10 enjoying sunbathing or sitting on a beach and swimming in oceans whilst 2-in-10 enjoy swimming in lakes, fishing, especially in fresh water and/or motor/sail boating. Fewer Cyclists are motivated by diving/snorkelling and kayaking/canoeing than are Mountain Bikers.

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<sup>30</sup> Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Cyclists and Mountain Bikers provided in this chapter are appended. For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

Compared to the typical U.S. overnight pleasure traveller, Cyclists and Mountain Bikers are more likely to identify *active* outdoor activities such as cycling, hiking, alpine skiing, fishing, or swimming and *passive* ones such as sunbathing on a beach or nature viewing or as ones that *motivated* recent trips (main reason) and as activities that were engaged in on these trips (any participation). Their higher level of engagement with the outdoors on trips vis à vis the typical American tourist suggests that these cycling enthusiasts represent distinctive markets. [See the summary table below with activities named by at least about 1-in-3 Cyclists or Mountain Bikers as ones that *motivated* (main reason) a recent overnight trip.]

<u>Outdoor Activities</u>	<u>Main Reason</u>			<u>Any Participation</u>		
	<b>Cyclists</b>	<b>Mountain Bikers</b>	All U.S. Pleasure Tourists	<b>Cyclists</b>	<b>Mountain Bikers</b>	All U.S. Pleasure Tourists
Recreational Cycling, same day excursions	83%	31%	1%	90%	42%	5%
Mountain Biking same day excursions	17%	100%	1%	24%	100%	2%
Hiking	36%	45%	6%	55%	63%	19%
Nature Park	35%	38%	10%	51%	50%	27%
Sunbathing or sitting on a beach	32%	31%	13%	53%	48%	29%
Camping (any)	31%	36%	10%	51%	61%	23%
Alpine Skiing	23%	37%	6%	27%	43%	8%
Swimming in Oceans	27%	30%	9%	54%	54%	28%

These high levels of differentiation from typical American travellers are further evidence of Cyclists and Mountain Bikers distinctive outdoor tourism interests.

See Table A2, appended, for additional figures and comparisons to U.S. tourists with recent travel experience in British Columbia.

**TABLE 14: INDIVIDUAL OUTDOOR ACTIVITIES  
– MAIN & ANY\***

	Cyclists		Mountain Bikers	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(681)	(681)	(328)	(328)
Weighted, Projected	2,231,000	2,231,000	1,055,000	1,055,000
<i>Rank order among Cyclists - Main Reason</i>				
<b>Cycling</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Cycling – Recreational cycling, same day excursion	83%	90%	31%	42%
Cycling - Mountain biking	17%	24%	100%	100%
Cycling - as an overnight touring trip	26%	26%	9%	10%
<b>Hiking</b>	<b>36%</b>	<b>55%</b>	<b>45%</b>	<b>63%</b>
Same day excursion on overnight trip	29%	51%	31%	57%
Backpacking in wilderness with overnight camping	20%	25%	30%	38%
<b>Nature park</b>	<b>35%</b>	<b>51%</b>	<b>38%</b>	<b>50%</b>
<b>Sunbathing or sitting on a beach</b>	<b>32%</b>	<b>53%</b>	<b>31%</b>	<b>48%</b>
<b>Camping</b>	<b>31%</b>	<b>51%</b>	<b>36%</b>	<b>61%</b>
Public campground	26%	43%	31%	53%
Private campground	15%	29%	20%	33%
Camp site in wilderness setting	12%	19%	17%	29%
<b>Swimming in oceans</b>	<b>27%</b>	<b>54%</b>	<b>30%</b>	<b>54%</b>
<b>Well known natural wonders</b>	<b>26%</b>	<b>46%</b>	<b>22%</b>	<b>40%</b>
<b>Flora/fauna viewing</b>	<b>24%</b>	<b>42%</b>	<b>17%</b>	<b>37%</b>
Wildlife viewing – land based animals	15%	29%	12%	26%
Whale watching	12%	23%	9%	17%
Wildflowers/flora	12%	25%	8%	17%
Bird watching	11%	21%	7%	16%
<b>Alpine Skiing</b>	<b>23%</b>	<b>27%</b>	<b>37%</b>	<b>43%</b>
<b>Fishing</b>	<b>22%</b>	<b>35%</b>	<b>21%</b>	<b>36%</b>
Fresh water	17%	30%	18%	28%
<b>Swimming in lakes</b>	<b>22%</b>	<b>45%</b>	<b>22%</b>	<b>46%</b>
<b>Motor/sail boating</b>	<b>21%</b>	<b>34%</b>	<b>21%</b>	<b>31%</b>
<b>Fitness- Jogging or exercising outdoors</b>	<b>20%</b>	<b>37%</b>	<b>15%</b>	<b>31%</b>
<b>Diving/snorkelling</b>	<b>15%</b>	<b>31%</b>	<b>23%</b>	<b>33%</b>
<b>Kayaking/canoeing</b>	<b>15%</b>	<b>28%</b>	<b>20%</b>	<b>33%</b>
<b>Climbing</b>	<b>13%</b>	<b>19%</b>	<b>26%</b>	<b>34%</b>

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 2, Tables 2 to 11.

\*Activities shown here are those that are named by at least about 1-in-3 Cyclists or Mountain Bikers as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.

#### 4. Individual Trip Activities: Culture, Entertainment, Food/Wine, Shopping

By and large, Cyclists and Mountain Bikers utilize destinations' cultural, culinary and retail infrastructure as *things to see and do* while on overnight pleasure trips rather than as the driving force behind or motivation for their trips.<sup>31</sup> Entertainment-oriented activities in general, and particularly theme parks and spectator sporting events are, however, trip motivators for Cyclists and Mountain Bikers (see Table 15), attracting about 1-in-3 of these tourists.

##### Culture

Cyclists and Mountain Bikers are more inclined to engage in a variety of cultural and heritage activities as "one-of-many" trip activities than they are to be motivated to take overnight pleasure trips in order to engage in these activities. For example, about one-half have sought out a well-known historic site, visited a museum or strolled around a city to observe its buildings and architecture on recent pleasure trips but only 1-in-5 have taken a trip in order to engage in these activities. Similar patterns are evident for seeing other historic sites, attending arts performances such as live theatre, going to art galleries and participating in hands on learning activities. These tourists are twice as likely to engage in these activities *as one of their trip activities* as they are to consider them as the driving force behind the trip.

##### Entertainment

Perhaps because they tend to live in families with children, Mountain Bikers are particularly apt to take a trip to go to an amusement park (Main, 35%; Any, 51%). However, Cyclists are also drawn to amusement parks (Main, 31%; Any, 47%). Casinos are popular entertainment venues, especially for Mountain Bikers (Main, 25%; Any, 48%); they could be attracting younger males who participate in this sport.

Movies and farmers' markets or country fairs are popular trip activities (*any*) among about two-fifths of Cyclists, whereas over one-third of Mountain Bikers are attracted by rock & roll or popular concerts. Zoos, aquariums and fireworks displays also attract about one-third of Cyclists and Mountain Bikers. While Cyclists are as likely as Mountain Bikers to go to a zoo, aquarium, movie, free outdoor performances in a park setting and/or firework display while on a recent overnight pleasure trip, they are somewhat more likely to include farmers' markets or country fairs among their trip activities. All of these entertainment-oriented experiences are much more commonly identified as *one among many* trip activities than as a main reason for taking a trip among both Cyclists and Mountain Bikers.

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<sup>31</sup> Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Cyclists and Mountain Bikers provided in this chapter are appended. For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.



**Food**

Similar to many entertainment-oriented activities, dining out at restaurants offering *local* ingredients and cuisine (Cyclists: Main, 17%; Any, 74%; Mountain Bikers: Main, 14%; Any, 68%) and taking a day to enjoy wine tasting (Cyclists: Main, 13%; Any, 35%; Mountain Bikers: Main, 15%; Any, 30%) and visiting local outdoor cafes (Cyclists: Main, 10%; Any, 53%; Mountain Bikers: Main, 7%; Any, 45%) are much more common trip experiences (any) than trip drivers for Cyclists and Mountain Bikers.

**Shopping**

Shopping for apparel, books or music and local arts and crafts is a common trip pastime for Cyclists and Mountain Bikers but tends not to be the motivation for their recent overnight pleasure travel.

**Comparison to U.S. Pleasure Travellers**

As noted in the previous section, compared to *all* U.S. overnight pleasure travellers, Cyclists and Mountain Bikers are more likely to engage in outdoor activities or take trips for these activities. These cycling enthusiasts are also more likely than the *typical* American pleasure traveller to identify a wide range of cultural, entertainment and culinary activities as ones that *motivated* recent trips (main reason) or were engaged in on these trips (any participation). Cyclists and Mountain Bikers are about four times more likely to participate in team sports, tournaments and games than are *typical* American pleasure travelers and three times more likely to attend arts performances, museums, historic sites, zoos or rock & roll/popular concerts (as a main trip motivator).

	<u>Main Reason</u>			<u>Any Participation</u>		
			All U.S.			All U.S.
<u>Other Activities</u>	<b>Cyclists</b>	<b>Bikers</b>	Tourists	<b>Cyclists</b>	<b>Bikers</b>	Tourists
Amusement parks	31%	35%	18%	47%	51%	34%
Spectator Sports (any)	30%	36%	14%	45%	51%	27%
Museum (any)	23%	21%	7%	53%	54%	30%
Performing Arts	22%	19%	7%	41%	36%	20%
Team Sports, Tournaments, Games (any)	22%	27%	6%	39%	44%	19%
Strolling in a city to see architecture	21%	16%	7%	53%	43%	34%
Well known historic sites	20%	17%	8%	52%	44%	30%
Casinos	20%	25%	14%	44%	48%	36%
Zoos	20%	23%	6%	39%	39%	21%
Rock & roll/popular concert	16%	23%	6%	27%	34%	12%

See Table A3, appended, for additional activities and comparisons to U.S. tourists with recent travel experience in British Columbia.

TABLE 15: OTHER INDIVIDUAL ACTIVITIES – MAIN & ANY*	Cyclists		Mountain Bikers	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(681)	(681)	(328)	(328)
Weighted, Projected	2,231,000	2,231,000	1,055,000	1,055,000
<i>In rank order by main reason within each subgroup (Cyclists)</i>				
<b>Cultural &amp; Heritage</b>	<b>52%</b>	<b>83%</b>	<b>51%</b>	<b>82%</b>
Museum – Any	23%	53%	21%	54%
General History Museum	13%	35%	14%	32%
Science or Technology	13%	31%	12%	35%
Military/War Museum	10%	24%	13%	30%
Any Performing Arts	22%	41%	19%	36%
Live Theatre	15%	31%	12%	24%
Strolling around a city to see architecture	21%	53%	16%	43%
Historic sites - well known	20%	52%	17%	44%
Historic sites - other	16%	42%	12%	35%
Hands on Learning Activities	16%	31%	14%	32%
Art Galleries	14%	35%	14%	34%
<b>Entertainment</b>	<b>63%</b>	<b>90%</b>	<b>67%</b>	<b>91%</b>
Amusement park	31%	47%	35%	51%
Casino	20%	44%	25%	48%
Zoos	20%	39%	23%	39%
Aquariums	17%	37%	17%	38%
Firework displays	16%	32%	17%	36%
Rock & roll/popular concert	16%	27%	23%	34%
Free outdoor performances in a park setting	15%	34%	17%	36%
Farmers' markets or country fairs	14%	41%	15%	31%
Movies/cinema	13%	47%	14%	43%
<b>Food &amp; Wine</b>	<b>35%</b>	<b>88%</b>	<b>38%</b>	<b>86%</b>
Dining – restaurants offering local ingredients and recipes	17%	74%	14%	68%
Wine tasting (day visit)	13%	35%	15%	30%
Local outdoor cafes	10%	53%	7%	45%
Dining high-end (with international reputation)	9%	32%	7%	26%
Dining - other high-end (not with international reputation)	7%	38%	8%	38%
Shop or browse gourmet food in retail stores	7%	33%	4%	24%
<b>Shopping</b>	<b>20%</b>	<b>80%</b>	<b>19%</b>	<b>74%</b>
Clothing, shoes, jewellery	12%	55%	11%	47%
Bookstores or music stores	12%	54%	8%	50%
Local arts & crafts studios	12%	52%	7%	37%
Antiques	8%	34%	5%	29%

TABLE 15: OTHER INDIVIDUAL ACTIVITIES – MAIN & ANY*	Cyclists		Mountain Bikers	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(681)	(681)	(328)	(328)
Weighted, Projected	2,231,000	2,231,000	1,055,000	1,055,000
<i>In rank order by main reason within each subgroup (Cyclists)</i>				
<b>Other</b>				
Spectator Sports (Any)	30%	45%	36%	51%
Team Sports, Tournaments, Games (Any)	22%	39%	27%	44%
Fitness – working out in a fitness centre	19%	38%	12%	27%
Photography	12%	33%	11%	31%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 2, Tables 2 to 11.

\*Activities shown here are those that are named by at least about 1-in-3 Cyclists or Mountain Bikers as ones they participated in (**any**) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.

## 5. Overnight Cruises & Organized Group Tours

Most Cyclists and Mountain Bikers are not recent overnight cruise passengers or organized overnight tour participants (see Table 16). Of the 1-in-4 Cyclists and about 1-in-5 Mountain Bikers who have taken an overnight cruise in the past two years or so, destinations in the Caribbean are more popular than are Alaska and other locations.

Of those who participate in *any* overnight group tour, more Cyclists claim to have taken an **organized** overnight group tour (25% Cyclists; 19% Mountain Bikers) and more Mountain Bikers claim to have taken **self-directed** touring trips over a two-year period (21% Cyclists; 24% Mountain Bikers). Those who have gone on an overnight organized tour display slightly more preference for tours to *multiple* versus *single* destinations.

Taking a day tour while on an overnight trip is more characteristic of Cyclists (44%) and Mountain Bikers (40%) than is taking any type of overnight tour (39% Cyclists; 35% Mountain Bikers). Unlike overnight tours, however, Cyclists are somewhat more inclined to take self-directed day tours (31%) than they are to take organized ones (28%).

Favoured themes for organized day excursions include tours around the countryside and/or a city, sightseeing cruises and wilderness or outdoor tours. Mountain Bikers rank wilderness and outdoor tours and then city tours at the top of their list, whereas Cyclists rank countryside and then city tours on their list of organized day excursions. These same themes are popular among Cyclists and Mountain Bikers who take *self-directed* day touring excursions.<sup>32</sup>

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<sup>32</sup> See Detailed Tabulations, Volumes 2, 4 Table 13-2 for figures.

TABLE 16: CRUISES/GROUP TOURS	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<b>Took any overnight cruise in past 2 years</b>	<b>27%</b>	<b>20%</b>	<b>49%</b>	<b>17%</b>
<b>Type of Cruise/Destination</b>				
Ocean - Caribbean	10%	9%	19%	9%
Ocean - Other	12%	8%	15%	5%
Ocean - Alaska	6%	4%	29%	3%
Great Lakes	2%	1%	1%	*
<b>Overnight Touring (NET)</b>	<b>39%</b>	<b>35%</b>	<b>48%</b>	<b>20%</b>
Organized Tour	25%	19%	32%	12%
Multiple Location	18%	14%	26%	8%
Single Location	14%	10%	16%	7%
Self-Directed Touring	21%	24%	26%	11%
<b>Same-Day Touring on Overnight Trip (NET)</b>	<b>44%</b>	<b>40%</b>	<b>57%</b>	<b>30%</b>
Self-Directed Touring	31%	30%	38%	20%
Organized Excursion	28%	23%	43%	19%
<b>Type of Organized Day Tour</b>				
<i>Among Organized Day Tour Takers (In rank order by Cyclists)</i>	(100%)	(100%)	(100%)	(100%)
Countryside	55%	53%	60%	42%
City	55%	54%	69%	54%
Sightseeing cruise (day excursion)	45%	50%	50%	34%
Wilderness/outdoor	41%	55%	45%	26%
Wineries	17%	23%	21%	13%
Factory	15%	13%	14%	7%
Casino	15%	19%	18%	14%
Airplane/helicopter (pilot or passenger)	6%	8%	16%	6%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Tables 12 and 14. \*Less than 0.5%. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## VII. Trip Planning

### A. Who Does the Planning?

The majority of Cyclists and Mountain Bikers claim to have *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 Cyclist or Mountain Biker or is shared with other household members.

TABLE 17: TRAVEL PLANNING	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<b>Frequency of personal involvement in trip planning, past 2 years</b>				
All	65%	60%	69%	65%
Most	20%	24%	18%	15%
Some	10%	12%	10%	10%
None/not stated	5%	5%	4%	10%
<b>Main responsibility for trip planning</b>				
Respondent	41%	46%	41%	39%
Shared with other household member	29%	21%	26%	25%
Spouse/partner	18%	17%	20%	17%
Other/not stated/not involved in travel planning	12%	16%	13%	19%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Tables 16 and 17. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## B. Travel Information Sources & Travel Media

Of the many sources of travel information available to Cyclists and Mountain Bikers, the internet tops the chart (see Table 18). Over 8-in-10 of these tourists rely on the **internet** for travel information, 6-in-10 rely on their own **past experience** and 5-in-10 rely on anecdotal information provided by **friends and relatives** as well as **maps**. About one-third rely on **newspapers, auto clubs, official DMO travel guides** and on **Visitor Information Centres** to obtain travel information. In the main, these are the same sources of information that may be influencing American pleasure travellers who have recently done so, to take trips to British Columbia.

### Travel Information Sources for at least 1-in-3 Cyclists, Mountain Bikers, Recent Pleasure Tourists to British Columbia and Any Destination

(in rank order in each column)

<u>Cyclists</u>	<u>Mountain Bikers</u>	<u>U.S. Pleasure Tourists</u>	
		<u>To British Columbia</u>	<u>Total</u>
Internet website	Internet website	Internet website	Internet website
Past experience	Past experience	Past experience	Past experience
Advice of friends/relatives	Advice of friends/relatives	Advice of friends/relatives	Advice of friends/relatives
Maps	Maps	Maps	
Newspaper	Newspaper	Official DMO travel guides	
Auto club	Official DMO travel guides	Newspapers	
Official DMO travel guides	Auto club	Auto club	
Visitor Information Centres	Visitor Information Centres	Travel agent	

With most Cyclists and Mountain Bikers relying on the internet for travel planning and nearly three-fifths saying that they *normally* visit **travel websites**, the internet has the greatest reach for cycling-oriented tourism businesses in British Columbia. Both Cyclists and Mountain Bikers are more apt to watch **televised travel shows** (39% Cyclists; 40% Mountain Bikers) than to read the **travel section in weekday editions** of their local newspaper (26% Cyclists; 20% Mountain Bikers). General **travel magazines** such as *Condé Nast* are less popular (22% Cyclists; 20% Mountain Bikers) than are **outdoor activities/sports magazines** such as *Backpacker* or *Outdoor Life* among Cyclists (28%) and Mountain Bikers (37%).

Compared to recent American tourists to British Columbia, Cyclists and Mountain Bikers are somewhat more likely to read affinity group magazines such as *Outdoor Life* but less inclined to read generic *travel* magazines. Frequent readership of travel sections in a local newspaper's weekend or weekday editions is less common among Cyclists and Mountain Bikers than it is among those who have recently travelled to British Columbia. However, Cyclists tend to read these travel sections more frequently than U.S. overnight pleasure travellers as a whole, while on the other hand; Mountain Bikers tend to read these travel sections at about the same rate as do all American overnight tourists.<sup>33</sup>

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<sup>33</sup> 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 18: INFORMATION SOURCES FOR TRAVEL PLANNING & GENERAL MEDIA HABITS**

	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<i>In rank order by Cyclists</i>				
<b><u>SOURCES OF TRAVEL PLANNING INFO</u></b>				
<b>Internet website</b>	85%	88%	82%	68%
<b>Past experience</b>	61%	57%	60%	49%
<b>Advice of friends/relatives</b>	54%	54%	54%	41%
<b>Maps</b>	47%	49%	49%	29%
<b>Any newspaper</b>	36%	37%	40%	20%
Articles	32%	30%	36%	16%
Advertisements	18%	19%	20%	10%
<b>Auto club</b>	34%	32%	40%	22%
<b>Official DMO travel guides</b>	34%	33%	42%	18%
<b>Visitor information centres</b>	34%	31%	28%	18%
<b>Travel agent</b>	25%	24%	38%	17%
<b>Travel guide books</b>	24%	20%	30%	11%
<b>Travel information in mail</b>	21%	23%	30%	14%
<b>Any television</b>	14%	15%	19%	8%
Programs	12%	14%	17%	6%
Advertisements	5%	5%	6%	4%
<b>Electronic newsletters via e-mail</b>	13%	12%	12%	5%
<b>Trade, travel, sportsmen's shows</b>	6%	8%	7%	2%
<b><u>TRAVEL MEDIA</u></b>				
<b>Frequently read newspaper Travel Section</b>				
In weekday editions	26%	20%	34%	16%
In weekend editions	28%	20%	36%	20%
<b>Magazines read in typical month</b>				
Travel	22%	20%	28%	11%
Outdoor activities/sports	28%	37%	16%	11%
<b>Normally watch Travel Shows on TV</b>	39%	40%	48%	29%
<b>Normally visit Travel websites</b>	57%	59%	57%	39%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Tables 18, 28, 29, 30, 32. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. 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

As noted in the previous section, most Cyclists, Mountain Bikers and tourists who have taken a recent pleasure trip to British Columbia rely on the internet for travel planning. **Travel** sites such as *Expedia* or *Travelocity*, followed by **hotel/resort** sites and **airline** sites are the most commonly used websites among these American tourists who rely on the internet for travel planning (see Table 19). Approximately half of these tourists use **destination marketing organization** sites (49% Cyclists; 53% Mountain Bikers; which is higher than U.S. overnight pleasure travellers as a whole, 35%) and 2-in-5 internet users include **attractions** sites (40% Cyclists; 39% Mountain Bikers).

Not surprisingly, **booking** on-line is less common than is searching for information on the internet. Nonetheless, nearly two-thirds of American Cyclists (65%) and Mountain Bikers (64%) claim to have made a travel-related booking on-line over the past two years or so. As their website preferences would suggest, the most common on-line bookings for Cyclists are **air tickets** followed by **accommodation** and, to a lesser degree, car rentals and attractions; whilst for Mountain Bikers accommodation tops the list followed by air ticket bookings.

Use of the internet for travel planning and for booking travel arrangements is noticeably more widespread among both Cyclists and Mountain Bikers than among U.S. overnight pleasure travellers as a whole, with the exception of Mountain Bikers use of Cruise websites (11%), which is lower than U.S. overnight pleasure travellers as a whole (12%).

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<b>Used Internet website for travel planning, past 2 years</b>	<b>85%</b>	<b>88%</b>	<b>82%</b>	<b>68%</b>
	(100%)	(100%)	(100%)	(100%)
<b>Internet website(s) used</b> <i>(Among Users, in rank order by Cyclists)</i>				
Travel planning/booking	63%	64%	68%	56%
Hotel/resort	60%	56%	66%	53%
Airline	56%	51%	67%	46%
Destination marketing organization	49%	53%	50%	35%
Attraction	40%	39%	40%	33%
Cruise	17%	11%	35%	12%
Motorcoach	5%	2%	3%	1%
Other	33%	43%	31%	25%
<b>Any Internet Purchases in Past 2 Years</b> <i>(Among All Overnight Pleasure Travellers)</i>	<b>65%</b>	<b>64%</b>	<b>68%</b>	<b>47%</b>
	(100%)	(100%)	(100%)	(100%)
<b>Items Purchased On-Line</b> <i>(Among Users, in rank order by Cyclists)</i>				
Air tickets	82%	78%	86%	71%
Accommodation	81%	80%	77%	72%
Car rental	51%	46%	55%	39%
Tickets for activities/attractions	34%	31%	34%	27%
Package deal (2+ items)	26%	32%	31%	18%
Rail, bus, boat tickets	19%	20%	27%	12%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Tables 19, 20. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## VIII. Other Travel-Related Information

### A. Use of Package Deals

Purchase of package deals in the past two years is relatively uncommon among Cyclists and Mountain Bikers (see Table 20). Fewer than 1-in-20 say they relied on a package deal for *all* or *most* of their trips over the past two years or so and a further 1-in-3 have used package deals for *one* or *some* of these trips.

**Cyclists** who purchase packages want them to include accommodation and transportation to the destination, followed by transportation at the destination and tickets for activities and attractions. Somewhat fewer would like the package to include food and beverages.

On the other hand, **Mountain Bikers** give equal importance to accommodation and transportation to the destination and are more interested in tickets for activities and attractions than they are for transportation at the destination.

TABLE 20: PACKAGE DEALS	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<b>Frequency of Purchasing Packages in Past 2 Years</b>				
Most/all trips	5%	3%	7%	5%
One/some trips	28%	30%	42%	20%
No trips/not stated/not sure	67%	67%	51%	75%
<b>Desired Components of Packages</b> (Among Purchasers of Packages)				
<i>In rank order by Cyclists</i>	(100%)	(100%)	(100%)	(100%)
Accommodation	92%	86%	96%	91%
Transport to destination	90%	86%	89%	85%
Transport at destination	72%	54%	74%	67%
Tickets for activities/attractions	61%	57%	68%	62%
Food and beverage	50%	50%	52%	52%
Other	31%	26%	26%	22%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Table 21. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

**B. Benefits Sought From Pleasure Travel**

At the top of the list of benefits for taking pleasure or vacation trips is a **break from the day-to-day environment** and the ability to **relieve stress** and (see Table 21).<sup>34</sup> At least three-quarters of these markets attach a high level of importance to these attributes.

Approximately three-fifths want their vacations to be the basis of lasting **memories**, to help **enrich familial relationships** and/or to **see/do something new/different** while nearly half of Cyclists (47%) and Mountain Bikers (50%) regard **abandoning a fixed schedule** as a highly important benefit of vacations. By and large, these are the same benefits of vacations deemed to be highly important by recent American tourists to British Columbia and American overnight pleasure travellers in general.

**5 Top Highly Important Benefits in Rank Order Among Cyclists, Mountain Bikers and Recent Pleasure Tourists to British Columbia and Any Destination<sup>35</sup>**

		U.S. Pleasure Tourists	
<u>Cyclists</u>	<u>Mountain Bikers</u>	<u>To British Columbia</u>	<u>Total</u>
Break from day-to-day	Break from day-to-day	Break from day-to-day	Break from day-to-day
Relax/relieve stress	Relax/relieve stress	Relax/relieve stress	Relax/relieve stress
Relations – partner/children	Memories	Memories	Memories Relations – partner/children
Memories	New/different	New/different	
New/different	Relations – partner/children	Relations – partner/children	No fixed schedule

While not as widely endorsed as those cited above, **enriching ones perspective on life** and **keeping family ties alive** are important benefits of pleasure travel experiences for about two-fifths of Cyclists and Mountain Bikers. Around one-third of Cyclist and Mountain Bikers are interested in **gaining knowledge of history, other cultures or other places, stimulating their minds or being intellectually challenged** and/or being **physically challenged**<sup>36</sup>. A higher percentage of Mountain Bikers regard being **physically challenged** (41%) as highly important compared to Cyclists (34%). However, both Cyclists and Mountain Bikers are three times more likely than the U.S.

<sup>34</sup> Consumers 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 tourists who claim a benefit is *highly important*.

<sup>35</sup> For full array, see Table 21.

<sup>36</sup> *To be challenged physically/feel physically energized.*

travelling public as a whole, and more than twice as likely as those with recent travel to British Columbia, to rate being **physically challenged** as a highly important benefit for taking pleasure trips.

Benefits with low appeal to Cyclists and Mountain Bikers include **renewing personal connections with people (other than family)**, the opportunity to experience **solitude and isolation**, **having stories to tell** once the trip is over, and **being pampered**.

TABLE 21: BENEFITS SOUGHT FROM PLEASURE TRAVEL ( <i>Highly important</i> )	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<i>% Stating "Highly Important"</i>				
<i>In rank order by Cyclists</i>				
Break from day-to-day environment	72%	79%	62%	72%
Relax/relieve stress	71%	70%	62%	72%
Enrich relationship with partner/children	61%	58%	52%	55%
Create lasting memories	60%	62%	60%	58%
See/do something new/different	57%	58%	59%	43%
No fixed schedule	47%	50%	41%	53%
Enrich perspectives	43%	41%	36%	23%
Keep family ties alive	43%	37%	38%	46%
Knowledge of history, cultures, places	35%	33%	36%	20%
Stimulate mind/intellectual challenge	35%	31%	29%	19%
Physical challenge	34%	41%	14%	12%
Renew personal connections (non-family)	21%	18%	19%	19%
Solitude and isolation	18%	20%	11%	12%
Stories to share	18%	24%	13%	13%
To be pampered	15%	11%	15%	15%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Table 23. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

### C. Incidence of Summer/Winter Trips

Almost all Cyclists and Mountain Bikers say that they have taken an overnight pleasure trip during the summer months (93%, 95%, respectively) and over 3-in-4 have taken winter trips (see Table 22).

TABLE 22: INCIDENCE OF SUMMER/ WINTER PLEASURE TRIPS	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<b>Took Overnight Pleasure Trip in Past 2 Years In . . .</b>				
Summer	93%	95%	90%	82%
Winter	76%	80%	81%	62%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, Table 22. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## D. Memberships in Various Organizations

**Auto club membership** is characteristic of over 2-in-5 Mountain Bikers (44%) and just over half of Cyclists (51%) (see Table 23). Nearly 1-in-2 Cyclists (49%) and 2-in-5 Mountain Bikers (41%) are members of a frequent flyer program, whilst 1-in-3 claim to have memberships in a hotel or car rental loyalty program and/or sports club.

Generally, these membership levels are *lower* than those evident for recent visitors to British Columbia (with the exception of sports, hobby and nature/environmental clubs – which are higher than recent visitors to British Columbia) but are higher than those of the American travelling public as a whole (with the exception of book/reading clubs which are lower for Cyclists (10%) and comparable for Mountain Bikers (11%) with the U.S. travelling public as a whole (11%).

TABLE 23: MEMBERSHIPS	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected	2,231,000	1,055,000	5,340,000	166,003,000
<i>In rank order by Cyclists</i>				
Auto club	51%	44%	59%	43%
Frequent flyer program	49%	41%	62%	31%
Hotel/car rental loyalty program	33%	31%	40%	20%
Sports club	32%	32%	26%	16%
Community service club	15%	16%	18%	10%
Nature/environmental club	15%	14%	9%	5%
Book/reading club	10%	11%	13%	11%
Hobby club	10%	12%	9%	6%
Travel club	9%	8%	11%	4%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Table 33. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.



### E. Shelter Used Most Often on Camping Trips

Over half of American Cyclists (51%) and three-fifths of Mountain Bikers (61%) have taken a camping trip in the past two years. Of these Cyclists and Mountain Bikers that camp, they use a *tent* most often for shelter on recent camping trips (Cyclists 54%; Mountain Bikers 64%) to a much greater extent than they rely on a *motor home or RV* for shelter (Cyclists 15%; Mountain Bikers 11%).

Use of tents among Cyclists (54%) and Mountain Bikers (64%) who go camping, is higher than is the case among typical American tourists who have been camping (52%) and those who have recently travelled to British Columbia (48%).<sup>37</sup>

	<b>Cyclists</b>	<b>Mountain Bikers</b>	<b>All U.S. Pleasure Tourists</b>	
			To British Columbia	Any Destination
(Weighted, Projected)	Total 1,134,000	Total 640,000	1,735,000	38,328,000
<b>Took Camping Trip in Past Two Years</b> <i>In rank order by Cyclists</i>	<b>51%</b>	<b>61%</b>		
Tent	54%	64%	48%	52%
Motor home or RV	15%	11%	18%	13%
Travel trailer/ fifth wheel	11%	11%	13%	15%
Truck camper or van	7%	8%	7%	4%
Tent trailer	7%	3%	5%	6%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Table 46. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

<sup>37</sup> All U.S. Pleasure Tourists to British Columbia and "any destination" displayed in this table are those who claim to have been camping in the past two years, whether as *any* activity or a trip or as the *main* activity.

## F. Lodging

Nearly 3-in-5 Cyclists and Mountain Bikers who used lodging while on a pleasure trip in the past two years have stayed at a **resort or spa**. Over one-third of Cyclists prefer seaside resorts (35%), whilst over one-third of Mountain Bikers prefer a ski resort or mountain resort (34%) and Mountain Bikers are four times more likely than typical American tourists to stay at ski/mountain resorts such as these.

A higher percentage of Mountain Bikers, compared to Cyclists, stay in campgrounds while on vacation. Over 1-in-2 Mountain Bikers have stayed at a public campground (53%), while 1-in-3 have camped in a private campground (33%) or in a wilderness setting (29%). Whilst 2-in-5 Cyclists have stayed at a public campground (43%), nearly 1-in-3 have camped in a private campground (29%) and only 1-in-5 in a wilderness setting (19%).

Use of lodging among Cyclists and Mountain Bikers is higher than is the case among typical American tourists and those who have recently travelled to British Columbia (with the exception of Seaside resorts, where a lower percentage of Mountain Bikers stay in resorts such as these compared to American tourists who have recently travelled to British Columbia).

	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
			To British Columbia	Any Destination
(Weighted, Projected)	Total 1,787,000	Total 903,000	3,683,000	80,796,000
<b>Used Any Lodging</b>	<b>80%</b>	<b>86%</b>	<b>69%</b>	<b>49%</b>
<b>Resort/Spa (any)</b>	<b>58%</b>	<b>58%</b>	<b>54%</b>	<b>32%</b>
Seaside Resort	35%	30%	34%	19%
Lakeside/riverside resort	29%	28%	24%	13%
Ski resort or mountain resort	28%	34%	23%	9%
Health Spa	9%	10%	7%	3%
<b>Camping</b>				
Public campground in national/provincial/state park	43%	53%	27%	17%
Private Campground	29%	33%	15%	10%
Campsite in wilderness setting	19%	29%	9%	5%
<b>Wilderness/remote lodge</b>	<b>14%</b>	<b>18%</b>	<b>12%</b>	<b>4%</b>
<b>Motorhome/RV while touring (not camping)</b>	<b>11%</b>	<b>14%</b>	<b>10%</b>	<b>4%</b>
<b>Houseboat</b>	<b>8%</b>	<b>7%</b>	<b>3%</b>	<b>1%</b>
<b>Farm or guest ranch</b>	<b>8%</b>	<b>6%</b>	<b>3%</b>	<b>2%</b>
<b>Other lodging (any)</b>	<b>55%</b>	<b>65%</b>	<b>38%</b>	<b>26%</b>

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 2 & 4 Table 6. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## G. Ownership of Equipment

Nearly 1-in-4 Mountain Bikers (26%) and a slightly lower percentage of Cyclists (22%) own canoes or kayaks and nearly 2-in-10 own motorboats (Cyclists 18%, Mountain Bikers 17%) this is evidence of their preference for water-based activities and staying at riverside or lakeside resorts. However, ownership of a snowmobile or sailboat is less common.

Ownership of these types of equipment is appreciably higher among Cyclists and Mountain Bikers than it is among recent visitors to British Columbia and the American travelling public as a whole.

TABLE 25: EQUIPMENT OWNERSHIP	Cyclists	Mountain Bikers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(681)	(328)	(1,706)	(45,697)
Weighted, Projected <i>In rank order by Cyclists</i>	2,231,000	1,055,000	5,340,000	166,003,000
Motor home, camper, RV	22%	21%	17%	13%
Canoe/kayak	22%	26%	12%	8%
Motor boat	18%	17%	15%	14%
All-terrain vehicle (ATV)	13%	16%	9%	11%
Sailboat	6%	4%	4%	2%
Snowmobile	5%	5%	4%	3%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2 & 4, Table 45. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## IX. Appendices

### A. 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 <sup>38</sup>	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

TNS Canadian Facts conducted the U.S. portion of the study between January and June 2006. The universe under study was composed of American adults (18 years and over) who were members of TNS Canadian Facts' mail panel.

Over the course of the fieldwork, 60,649 self-completed questionnaires were returned and processed by TNS Canadian Facts. Among panel members who were asked to participate in the study, the response rate was approximately 71%. The supplier has not provided the recruitment rate for panel members. In the absence of this information, it is not possible to estimate the actual response rate for the study or to comment on the representativeness of the sample overall.

Survey data were weighted and projected to the U.S. adult population based on U.S. Census estimates of household size, age and gender at a variety of city/state and/or regional levels.

Research Resolutions used the TAMS U.S. 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.

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<sup>38</sup> Formerly *Alberta Economic Development*.

## B. Trip Activity Sector Definitions

The following activities as the *main reason* for at least one overnight trip in the past two years are used to define each of the Trip Activity Sectors mentioned in this report. Note that the sectors are NOT mutually exclusive.

Name	Main Activities on At Least One Overnight Trip in Past 2 Years
<b>River Outfitters</b>	White water rafting
<b>Sea Kayaking</b>	Kayaking or canoeing — ocean
<b>Backcountry Lodges</b>	Remote or fly-in wilderness lodge Remote or fly-in wilderness outpost Wilderness lodge you can drive to by car
<b>Cycling/Mountain Biking</b>	Recreational cycling, same day excursion Cycling — as an overnight touring trip Mountain biking
<b>History and Heritage</b>	Archaeological digs Curatorial tours Historical re-enactments (as an actor) Interpretive program at a historic site or national/provincial park Historical replicas of cities or towns with historic re-enactments Children's museums General history or heritage museums Science or technology museums Military/war museums Paleontological/archaeological sites Well known historic sites or buildings Other historic sites, monuments and buildings
<b>Snowmobiling</b>	Snowmobiling — Day use on organized trail Snowmobiling — As an overnight touring trip
<b>Diving</b>	Scuba diving in lakes/rivers Scuba diving in sea/ocean Snorkelling in lakes or rivers Snorkelling in sea/ocean
<b>Nordic Ski/Related Activities</b>	Cross country skiing Cross country or back country skiing as an overnight touring trip Snow shoeing Dog sledding Ski Jouring

<b>Golfing</b>	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
<b>Alpine Skiing</b>	Downhill skiing
	Heli-skiing
	Snowboarding
<b>Aboriginal Activities</b>	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)
	Aboriginal arts and crafts shows
	Aboriginal outdoor adventure and/or sports
<b>Fishing</b>	Fishing – fresh water
	Fishing – salt water
<b>Any Self-Guided Overnight Touring</b>	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
<b>Hiking/Trails</b>	Hiking – same day excursion while on a trip of one or more nights
	Hiking/Backpacking in wilderness settings with overnight camping or lodging
<b>Camping/RVing (NET)</b>	A public campground in a national, state, provincial or municipal park
	A private campground
	A camp site in a wilderness setting (not a campground)
	A motor home or RV while traveling or touring (not a camping trip)
<b>Camping/Tents or RVs</b>	As above, excluding “A motor home or RV while traveling or touring (not a camping trip)”
<b>Camping - Tents</b>	Camping as “Main” and use Tent/Tent Trailer
<b>Camping – RV</b>	Camping as “Main” and use Truck camper/van, Travel trailer/fifth wheel, or Motor Home/RV
<b>RVing (non-camping)</b>	
	A motor home or RV while traveling or touring (not a camping trip) as “Main” AND NO Camping as “Main” and use Truck camper/van, Travel trailer/fifth wheel, or Motor Home/RV

**C. U.S. Census Regions & States**

**New England**

Maine  
New Hampshire  
Vermont  
Massachusetts  
Connecticut

Rhode Island

**Middle Atlantic**

New York State  
Pennsylvania  
New Jersey

**South Atlantic**

Maryland  
Delaware  
Washington DC  
West Virginia  
Virginia  
North Carolina  
South Carolina  
Georgia  
Florida

**East North Central**

Wisconsin  
Michigan  
Illinois  
Indiana  
Ohio

**West North Central**

North Dakota  
South Dakota  
Minnesota  
Iowa  
Nebraska  
Kansas  
Missouri

**East South Central**

Kentucky  
Tennessee  
Mississippi  
Alabama

**West South Central**

Oklahoma  
Arkansas  
Texas

Louisiana

**Mountain**

Montana  
Idaho  
Wyoming  
Nevada  
Utah  
Colorado  
New Mexico  
Arizona  
**Pacific**  
Washington State  
Oregon  
California

**Alaska**

**Hawaii**

## **D. TNS Canadian Facts' "Lifestages" Definitions**

1 - YOUNG SINGLES:

1-Member Household

- Age of Head Under 35

2 - MIDDLE SINGLES:

1-Member Household

- Age of Head from 35 to 65

3 - OLDER SINGLES:

1-Member Household

- Age of Head Over 65

4 - YOUNG COUPLE:

Multimember Household

Age of Head Under 45

- Married or Non-related Individual(s) of Opposite Sex 18+ Present
- No Children Present

5 - WORKING OLDER COUPLE:

Multimember Household

Age of Head 45 and Over

Head of Household Employed

No Children Present

Married or Non-related Individual(s) of Opposite Sex 18+ Present

6 - RETIRED OLDER COUPLE

Multimember Household

Age of Head 45 and Over

Head of Household NOT Employed

No Children Present

Married or Non-related Individual(s) of Opposite Sex 18+ Present

7 - YOUNG PARENT

Multimember Household

Age of Head Under 45

- Youngest Child Under 6

8 - MIDDLE PARENT:

Multimember Household

Age of Head Under 45

- Youngest Child 6+

9 - OLDER PARENT:

Multimember Household

Age of Head 45+

- Child at Home - Any Age

0 - ROOMMATES

Head of Household Living with a Non-relative 18+ of Same Sex



**E. Trip Activities – Recent B.C. and Any Destination Pleasure Travellers**

TABLE A1: MAJOR ACTIVITY GROUPS – MAIN & ANY	Overnight Trip Activities - U.S. Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,706)	(1,706)	(45,697)	(45,697)
Weighted, Projected	5,340,000	5,340,000	166,003,000	166,003,000
<b>Outdoor Water Based Activities</b>	40%	68%	30%	56%
<b>Outdoor Land Based Activities</b>	50%	85%	30%	63%
Camping	15%	33%	10%	23%
<b>Cultural/Learning Activities &amp; Events</b>	39%	87%	23%	61%
<b>Theme/Amusement Parks/Movies (Entertainment)</b>	22%	50%	22%	43%
<b>Outdoor Winter Activities</b>	19%	27%	8%	12%
<b>Resorts</b>	23%	54%	13%	32%
<b>Fairs/Festivals</b>	19%	57%	14%	41%
<b>Spectator Sports</b>	21%	41%	14%	27%
<b>Food &amp; Wine</b>	22%	88%	13%	74%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Tables 2/11.

**TABLE A2: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN & ANY\***

	Overnight Trip Activities - U.S. Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,706)	(1,706)	(45,697)	(45,697)
Weighted, Projected	5,340,000	5,340,000	166,003,000	166,003,000
<b>Camping</b>	<b>15%</b>	<b>33%</b>	<b>10%</b>	<b>23%</b>
Public campground	12%	27%	7%	17%
Private campground	6%	15%	4%	10%
Camp site in wilderness setting	4%	9%	2%	5%
Sunbathing or sitting on a beach	14%	36%	13%	29%
Swimming in oceans	9%	33%	9%	28%
Alpine skiing/snow boarding	13%	17%	6%	8%
Nature park	23%	50%	10%	27%
A public campground in national/state/provincial park	12%	27%	7%	17%
Fishing	11%	23%	8%	19%
Fresh water	8%	17%	6%	15%
Salt water	5%	12%	3%	7%
Swimming in lakes	5%	21%	4%	16%
Well known natural wonders	19%	48%	7%	21%
Scuba diving/snorkelling	7%	26%	3%	12%
Snorkelling in seas/oceans	5%	24%	2%	11%
Seaside resorts (lodging)	12%	34%	7%	19%
Hiking - same day excursion on overnight trip	8%	36%	4%	18%
Hiking/backpacking as an overnight trip	6%	9%	3%	4%
Flora/fauna viewing	17%	50%	5%	21%
Wildlife viewing – land based animals	10%	33%	3%	13%
Wildflowers/flora	5%	25%	2%	9%
Whale watching	10%	31%	2%	8%
Bird watching	5%	20%	1%	7%
Cycling	6%	15%	2%	6%
Recreational cycling	4%	12%	1%	5%
Mountain biking	3%	6%	1%	2%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Tables 2/11. \*Activities shown here are those that are named by at least 1-in-3 Cyclists or Mountain Bikers as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover. \*Less than 0.5%.

**TABLE A3: OTHER INDIVIDUAL ACTIVITIES – MAIN & ANY\***

	Overnight Trip Activities - U.S. Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,706)	(1,706)	(45,697)	(45,697)
Weighted, Projected	5,340,000	5,340,000	166,003,000	166,003,000
<b>Cultural &amp; Heritage</b>				
Strolling in a city to see architecture	13%	58%	7%	34%
Well known historic sites	13%	54%	8%	30%
Museums - general history	8%	41%	4%	20%
Historic sites -other	10%	47%	6%	25%
Art galleries	7%	36%	3%	15%
Museum - Science or Technology	5%	27%	3%	12%
Any Aboriginal Culture/Events	9%	28%	3%	9%
Aboriginal heritage attractions (museums/interpretive centres)	6%	23%	2%	6%
Aboriginal arts and crafts	3%	11%	1%	3%
<b>Entertainment</b>				
Amusement parks	18%	35%	18%	34%
Casino	16%	50%	14%	36%
Aquariums	8%	33%	5%	21%
Water theme parks	4%	12%	5%	13%
Zoos	8%	31%	6%	21%
Farmers' markets or country fairs	7%	35%	4%	19%
Movies/cinemas	5%	41%	3%	27%
Firework displays	6%	24%	3%	16%
<b>Food &amp; Wine</b>				
Dining – restaurants offering local ingredients and recipes	10%	73%	6%	58%
Dining - other high-end (not with international reputation)	6%	42%	3%	25%
Local outdoor cafes	4%	50%	2%	28%
Wine tasting (day visit)	10%	39%	3%	16%
<b>Shopping</b>				
Clothing, shoes, jewellery	7%	57%	5%	50%
Bookstores or music stores	5%	54%	3%	35%
Local arts & crafts studios	6%	55%	3%	34%
Antiques	5%	34%	3%	23%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Tables 2/11. \*Activities shown here are those that are named by at least 1-in-3 Cyclists or Mountain Bikers as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.