



## **RESEARCH SERVICES**

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

#### **Focus on Backcountry Lodge Guests**

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The 2006 Travel Activities and Motivations Survey (TAMS), was a comprehensive survey of North American households designed to examine the recreational activities and travel habits and behaviours of Americans and Canadians over the past two-year period.

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 Ontario Ministry of Tourism	The Quebec Ministry of Tourism
The Ontario Tourism Marketing Partnership	Tourism Manitoba
The Canadian Tourism Commission	Tourism Saskatchewan
The Atlantic Canada Opportunities Agency	Alberta Economic Development
The Department of Canadian Heritage	Tourism British Columbia <sup>1</sup>
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Statistics Canada	The Government of Northwest Territories

Alex Athanassakos of the Ontario Ministry of Tourism served as the project manager for the TAMS partnership.

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## **I. Executive Summary**

### **BACKCOUNTRY LODGE GUESTS ARE A NICHE MARKET FOR BRITISH COLUMBIA.**

Of the 166.0 million American pleasure tourist market as a whole, about 7.1 million Americans say they went to a wilderness lodge or outpost on trips taken over a two-year period. Of these, 2.9 million say they took a trip *in order to* stay in this type of lodging, or about 1-in-50 American overnight pleasure travellers to *any destination* (2%) and twice this proportion (4%) of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so.

### **MOST BACKCOUNTRY LODGE GUESTS GO TO PROPERTIES ACCESSIBLE BY CAR.**

Most Backcountry Lodge Guests have recent experiences at wilderness lodges that are accessible by car (76%), followed by remote or fly-in wilderness lodges (22%), and less commonly, fly-in outposts (14%).

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

Backcountry lodge enthusiasts live in just about every one of the fifty states and are distributed across the United States in a manner almost identical to the adult population as a whole.

Regional marketing efforts to attract Backcountry Lodge Guests may be challenging, particularly in light of the fact that these tourists are concentrated in U.S. regions such as East North Central and South Atlantic – regions that are not strong markets for British Columbia. Conversely, British Columbia is especially attractive as a destination to Californians, drawing one-quarter of its recent U.S. tourists from this state but only about 1-in-7 Backcountry Lodge Guests live in California.

### **BACKCOUNTRY LODGE GUESTS TEND TO BE MIDDLE-AGED MEN.**

Men may predominate, but 4-in-10 Backcountry Lodge Guests are women. While every age group is represented among Backcountry Lodge Guests, they tend to be concentrated in the middle of the age spectrum. About 1-in-4 are young adults (18 to 24 years) but 1-in-2 are in their mid-thirties to mid-forties or mid-forties to mid-fifties. Approximately 3-in-10 are 55 years of age or older. Consistent with their ages, Backcountry Lodge Guests are parents or, less

commonly, a partner in a couple. They live in households of about three people, on average.

#### **BACKCOUNTRY LODGE GUESTS SPAN WIDE EDUCATION AND INCOME RANGES.**

About two-fifths are university educated, two-thirds are actively engaged in the labour force and over one-third live in households with at least one person occupying an executive, managerial or professional position. About one-seventh of these Backcountry Lodge Guests are retirees.

Backcountry Lodge Guests represent a broad range of incomes, reflecting, in part their wide age distribution. One-third report household incomes under \$60,000, a similar proportion is in the \$60,000 to under \$100,000 bracket and in the more affluent \$100,000+ bracket.

#### **ONE-THIRD OF BACKCOUNTRY LODGE GUESTS HAVE BEEN TO CANADA ON A RECENT OVERNIGHT PLEASURE TRIP.**

Canada emerges as a particularly attractive destination for wilderness lodge enthusiasts. It attracts one-third of all Backcountry Lodge Guests, compared to only about 1-in-8 *typical* U.S. pleasure tourists with recent pleasure trips to Canada (13%).

At the same time, Canada shares this distinction with countries outside North America and with many U.S. destinations. Mexico, Europe and the Caribbean draw Backcountry Lodge Guests at lower rates than does Canada but half of the Americans in this market travel *only* in the U.S.

#### **ONTARIO IS THE PRINCIPLE CANADIAN COMPETITOR FOR THESE AMERICAN TRAVELLERS.**

Over a two-year period, Ontario attracted almost three times as many Backcountry Lodge Guests (22%) as did British Columbia (8%). **Quebec** is also a source of competition within this market (9%), attracting them at about the same rate as British Columbia. The popularity of central Canadian provinces among Backcountry Lodge Guests is likely a function of their closer proximity to the high concentrations of these tourists in the East North Central and South Atlantic regions of the U.S.

#### **BACKCOUNTRY LODGE GUESTS ARE DRAWN TO SUN/SEA STATES.**

These destinations including Florida, California, and Nevada attract three-fifths of Backcountry Lodge Guests for overnight pleasure trips. On a state-by-state basis, **Florida**, followed by **California**, **Nevada** (more likely for gambling than backcountry lodging experiences) and **New York** are the most popular U.S. destinations for Backcountry Lodge Guests when travelling outside their home state. As such, these states represent stiff competition for British Columbia's wilderness lodging properties.

#### **A SAFE DESTINATION IS A PRIORITY.**

Most Backcountry Lodge Guests 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*, one that has *many things for adults to see and do*, offers *convenient access by car*, poses *no health concerns*, and has *mid-range lodging*.

#### **BACKCOUNTRY LODGE GUESTS TEND TO BE OUTDOOR TOURISTS.**

There is considerable overlap between Backcountry Lodge Guests and other outdoor sectors of interest to tourism businesses in British Columbia.<sup>2</sup> For example, about two-fifths of them are also **Campers/RVers** and/or **History/Heritage Tourists** and about one-third are **Anglers**. One-quarter of them correspond to the activity profile of **Self-Guided Overnight Touring Travellers** and/or **Hikers**.

#### **THE MARKET INCLUDES PASSIVE AND ACTIVE NATURE SEEKERS.**

The *outdoor* activity profile of Backcountry Lodge Guests suggests a many of these tourists are seeking comparatively sedentary experiences and passive interactions with nature – camping, day hikes, wildlife and flora viewing. They also take trips for *other* types of outdoor-oriented lodging experiences, including seaside and river or lakeside resorts. These guests want to be *in nature* rather than to *engage* nature. *Missing* as prominent trip drivers for these Backcountry Lodge Guests are outdoor activities such as climbing, backpacking, skiing, paddling or rafting. This activity profile likely fits the majority of Backcountry

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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.

Lodge Guests who go to *drive-in* wilderness lodges rather than *fly-in* outposts or lodges.

There are, however, sub-markets within Lodge Guests. For example, *hunting* and especially *big game hunting* motivate trips for over one-fifth of Backcountry Lodge Guests – a rate that is dramatically higher than that evident among *all* U.S. overnight pleasure travellers. These sport fishermen/women or hunters likely represent Backcountry Lodge Guests who seek *fly-in* wilderness outpost or lodge experiences in order to hunt or fish in wilderness settings.

### **BACKCOUNTRY LODGE GUESTS ARE NOT ESPECIALLY DRIVEN TO TAKE CULTURAL, CULINARY OR SHOPPING TRIPS.**

By and large, Backcountry Lodge Guests 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 their trips. Entertainment-oriented activities in general, and particularly theme parks, casinos, and spectator sports events such as professional baseball or football games are, however, trip motivators for sizeable minorities of Lodge Guests.

Over half have strolled around a city to observe its buildings and architecture on a recent pleasure trip but only about 1-in-4 have taken a trip in order to do so. Similar patterns are evident for seeing other historic sites, attending arts performances such as classical music concerts, opera or ballet and going to general history museums.

Like historic sites and performances, dining out at restaurants offering *local* ingredients and cuisine, other high-end dining experiences and going to local cafes are much more common trip experiences (any) than trip drivers for Lodge Guests.

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

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

Three-quarters of these tourists rely on the internet for travel information and over half use anecdotal information provided by **friends and relatives** and their own **past experience**. About two-fifths rely on **maps, newspapers** and **official DMO travel guides** 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.

Although not a commonly used source of information, **consumer travel shows or sportsmen's shows** are more widely used by Backcountry Lodge Guests than by American overnight pleasure travellers as a whole or those who have recently travelled to British Columbia.

#### **BRITISH COLUMBIA IS RATED ON PAR WITH MANY OTHER DESTINATIONS FOR OVERALL APPEAL.**

American Backcountry Lodge Guests are most enthusiastic about Hawaii as an *appealing destination* for pleasure travel. They accord this tropical state a rating of 8.3 on a ten-point scale. At 6.9, British Columbia achieves a much lower appeal rating than does Hawaii but one that is about on par with other destinations, including Colorado (7.2), California (7.1) Florida (6.9) and Arizona (6.9). The province is rated comparably to Ontario (6.8) but higher than all other *Canadian* destinations by Lodge Guests.

#### **THEIR WIDE GEOGRAPHIC DISPERSION ACROSS THE U.S. IS A KEY CHALLENGE IN ATTRACTING BACKCOUNTRY LODGE GUESTS TO BRITISH COLUMBIA.**

Unlike many other outdoor market sectors, Backcountry Lodge Guests are *not* concentrated in British Columbia's traditional catchment area – California, Oregon and Washington. Instead, they tend to be distributed in the same manner as the U.S. population as a whole. Thus, many of them live in the East North Central and Mid and South Atlantic parts of the U.S. Not only are these regions relatively far from British Columbia but also they are also relatively close to Ontario – a province with a strong backcountry lodge infrastructure.

Attracting this long haul market will require image and awareness building that enables Backcountry Lodge Guests to recognize and seek the unique characteristics of a British Columbia wilderness lodge or outpost experience.

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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
- Lodge Guests
- **Backcountry Lodge Guests**
- 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.

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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.

Tourism British Columbia (TBC) commissioned Research Resolutions & Consulting Ltd. to prepare the American tourist profiles. This profile describes **Backcountry Lodge Guests**.<sup>5</sup> Additional profiles will be issued over the coming months.

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<sup>5</sup> *Backcountry Lodge Guests* are commonly referred to throughout this report as *Lodge Guests*.

## B. The American Backcountry Lodge Guests Report

For purposes of this report, **American Backcountry Lodge Guests** (*Lodge Guests*) 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 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:<sup>6</sup>

- *Going to a remote or fly-in wilderness lodge*
- *Going to a remote or fly-in wilderness outpost*
- *Going to a wilderness lodge you can **drive to** by car*

People who take a trip *in order to* go to a backcountry lodge or outpost are only a fraction of tourists who go to these types of properties on their vacations. In fact, over seven million Americans say they went to a wilderness lodge or outpost on trips taken over a two-year period. Of these 7.1 million American pleasure tourists, 2.9 million (41%) say they took a trip *in order to* stay in this type of lodging. These backcountry lodge enthusiasts – those for whom staying in a remote lodge or outpost is the main reason for a trip – are the focus of this report because as the “dedicated” or “hard core” market, they represent a crystallization of the interests and characteristics that might attract more casual participants to the activity.

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

### Note to Readers

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

In other words, American Backcountry Lodge Guests claim to have taken an overnight trip motivated by a stay in a wilderness lodge or outpost 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, Lodge Guests may or may not have been at a wilderness lodge or outpost in a particular country, province or state they have visited recently for an overnight pleasure trip.

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<sup>6</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.

### 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).

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

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

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 Rafter**s, **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 SIZE¹	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>	Index				
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
Cyclists/Mountain Bikers	2,914,000	2%	305,000	6%	300
Nordic Skiers	1,567,000	1%	265,000	5%	500
Backcountry Lodge Guests	2,873,000	2%	224,000	4%	200
River Rafter	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 1, page 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
- Anglers
- Golfers
- Campers/RVers
- Heritage and History Tourists.



### **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
50%+								
30% - 49%	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						
20% - 29%	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. Backcountry Lodge Guests Market Profile

### A. Market Composition

The Backcountry Lodge Guest sector is composed of pleasure tourists who have stayed in one or more of three types of lodging as the main reason for a recent trip. Those who seek a wilderness lodge experience that is accessible by car dominate this sector, representing 3-in-4 Lodge Guests. A further 2-in-10 American tourists claim to have stayed in a remote or fly-in wilderness lodge (22%) and fewer say they have recent experience at a remote or fly-in wilderness outpost (15%). Thus, no more than two-fifths of these Backcountry Lodge Guests have stayed at a *remote* or *fly-in* wilderness lodge or outpost over the past two years or so.<sup>12</sup>

	Total Lodge Guests <sup>13</sup>	
	2,873,000	
Remote or fly-in wilderness <b>lodge</b>	635,000	22%
Remote or fly-in wilderness <b>outpost</b>	415,000	14%
Wilderness lodge you can <b>drive to</b> by car	2,183,000	76%

Readers should bear in mind the prominence of the *drive-in* segment of Backcountry Lodge Guests in the following pages.

<sup>12</sup> Sum of percentages for remote/fly-in wilderness lodge and outpost is 37%. Some Backcountry Lodge Guests have stayed in more than one type of backcountry lodge over a two-year period, explaining why the percentages shown above add to more than one hundred percent.

<sup>13</sup> See Detailed Tables, Volume 2, page 11-1.

## **B. Regional and Demographic Characteristics**

### **1. Place of Residence**

At about 2.9 million, Backcountry Lodge Guests – American adults who take vacations *in order to* go to a **backcountry lodge or outpost** – are a niche market. They represent 1-in-50 American overnight pleasure travellers to *any destination* (2%) and twice this proportion of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so (4%).

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

These backcountry lodge enthusiasts live in just about every one of the fifty states and are distributed across the United States in a manner almost identical to the adult population as a whole.

- The **Pacific** states are home to about 1-in-6 adult Americans and the same proportion of Lodge Guests. California is the most populated of the Pacific states, accounting for about 1-in-8 adult Americans (12%) and for about the same proportion of Backcountry Lodge Guests (14%). By virtue of its size, California contributes more Backcountry Lodge Guests than does any other single state.
- One-in-twenty Backcountry Lodge Guests live in **Texas**, but a higher share of American adults resides in this state (8%), suggesting that backcountry lodges are not especially popular among Texans.
- No other single state contributes more than 1-in-25 Lodge Guests.

Regional marketing efforts to attract Backcountry Lodge Guests may be challenging, particularly in light of the fact that these tourists are concentrated in U.S. regions such as East North Central (18%) and South Atlantic (17%) – regions that are not strong markets for British Columbia.

In fact, Backcountry Lodge Guests are twice as likely to be residents of East North Central, including Michigan and Ohio, as Americans from these areas are to be recent British Columbia tourists (9% for the region). Similarly, seventeen percent of Backcountry Lodge Guests live in South Atlantic states but only eleven percent of British Columbia's recent American tourists are residents of this region. Conversely, Backcountry Lodge Guests are not especially likely to be Californians (14%) but British Columbia draws one-quarter of its recent U.S. tourists from this state (24%).

<b>TABLE 1: PLACE OF RESIDENCE</b>	<b>Backcountry Lodge Guests</b>	<b>All U.S. Pleasure Tourists</b>		<b>U.S. Population</b>
	<b>Total</b>	<b>To British Columbia</b>	<b>Any Destination</b>	<b>Adults (18+ Years)</b>
Unweighted base	(783)	(1,706)	(45,697)	(60,649)
Weighted, Projected	2,873,000	5,340,000	166,003,000	222,846,000
<b>Incidence of Lodge Guests</b>	<b>100%</b>	<b>4%</b>	<b>2%</b>	<b>1%</b>
<b>New England</b>	<b>6%</b>	<b>3%</b>	<b>5%</b>	<b>5%</b>
Massachusetts	3%	1%	2%	2%
<b>Middle Atlantic</b>	<b>10%</b>	<b>6%</b>	<b>14%</b>	<b>14%</b>
New York	4%	3%	6%	7%
Pennsylvania	4%	1%	4%	4%
<b>East North Central</b>	<b>18%</b>	<b>9%</b>	<b>16%</b>	<b>16%</b>
Michigan	4%	2%	4%	4%
Illinois	4%	3%	4%	4%
Ohio	4%	2%	4%	4%
<b>West North Central</b>	<b>9%</b>	<b>5%</b>	<b>7%</b>	<b>7%</b>
<b>South Atlantic</b>	<b>17%</b>	<b>11%</b>	<b>19%</b>	<b>19%</b>
Georgia	4%	2%	3%	3%
Florida	4%	5%	6%	6%
<b>East South Central</b>	<b>5%</b>	<b>2%</b>	<b>6%</b>	<b>6%</b>
<b>West South Central</b>	<b>9%</b>	<b>6%</b>	<b>11%</b>	<b>11%</b>
Texas	5%	5%	7%	8%
<b>Mountain</b>	<b>10%</b>	<b>7%</b>	<b>7%</b>	<b>7%</b>
<b>Pacific</b>	<b>17%</b>	<b>50%</b>	<b>16%</b>	<b>16%</b>
California	14%	24%	13%	12%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 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 Backcountry Lodge Guests, they tend to be concentrated in the middle of the age spectrum. About 1-in-4 are young adults (18 to 24 years) but 1-in-2 are in their mid-thirties to mid-forties (22%) or mid-forties to mid-fifties (24%). Approximately 3-in-10 are 55 years of age or older (see Table 2).

While Lodge Guests' age distribution closely resembles the age profile of *all* American tourists, it differs from the typical U.S. visitor to British Columbia, particularly at the older end of the age spectrum. Specifically, almost half of the Americans who have recently taken an overnight pleasure trip to the province are 55 years of age or over but less than one-third of the backcountry lodging market is at least 55 years old.

Men (58%) are somewhat more likely to be Backcountry Lodge Guests than are women (42%), with middle-aged men (35 to 54 years) representing about one-quarter of the market and middle-aged women representing about one-fifth.

TABLE 2: AGE & GENDER	Backcountry Lodge Guests	All U.S. Pleasure Tourists	U.S. Population	
	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(783)	(1,706)	(45,697)	(60,649)
Weighted, Projected	2,873,000	5,340,000	166,003,000	222,846,000
Age				
18 – 24 Years	9%	6%	11%	11%
25 – 34 Years	16%	15%	21%	20%
35 – 44 Years	22%	14%	17%	16%
45 – 54 Years	24%	21%	21%	21%
55 – 64 Years	17%	21%	16%	16%
65+ Years	13%	24%	14%	17%
Gender				
Men	58%	53%	49%	48%
18 – 34 Years	14%	11%	16%	16%
35 – 54 Years	26%	20%	18%	18%
55+ Years	18%	23%	15%	15%
Women	42%	47%	52%	52%
18 – 34 Years	11%	10%	16%	15%
35 – 54 Years	19%	16%	20%	19%
55+ Years	12%	21%	15%	17%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 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 Backcountry Lodge Guests, like tourists who live in the U.S. as a whole, are white. About two-fifths are university educated, two-thirds are actively engaged in the labour force and over one-third live in households with at least one person occupying an executive, managerial or professional position (see Table 3). About one-seventh of these Backcountry Lodge Guests are retirees.

Backcountry Lodge Guests represent a broad range of incomes, reflecting, in part their wide age distribution. One-third report household incomes under \$60,000 (33%), a similar proportion is in the \$60,000 to under \$100,000 bracket (36%) and in the more affluent \$100,000+ bracket (32%).

TABLE 3: RACE, EDUCATION, OCCUPATION, INCOME	Backcountry Lodge Guests	All U.S. Pleasure Tourists	U.S. Population	
	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(783)	(1,706)	(45,697)	(60,649)
Weighted, Projected	2,873,000	5,340,000	166,003,000	222,846,000
<b>Race</b>				
White	89%	87%	86%	84%
African American	3%	2%	6%	7%
Asian American	2%	4%	2%	2%
Other/Not stated	6%	7%	6%	7%
<b>Education</b>				
High school diploma or less	17%	9%	20%	26%
Some post-secondary	28%	23%	29%	29%
Post-secondary diploma or certificate	11%	9%	10%	10%
University degree+	42%	56%	39%	33%
<b>Labour Force Participant<sup>1</sup></b>	69%	62%	66%	61%
<b>Retirees</b>	15%	26%	15%	16%
<b>Executive/Manager /Professional<sup>2</sup></b>	37%	32%	30%	26%
<b>Household Income<sup>3</sup></b>				
Under \$40,000	21%	14%	27%	36%
\$40,000 - \$59,999	12%	16%	19%	18%
\$60,000 - \$99,999	36%	31%	30%	26%
\$100,000 - \$149,999	18%	22%	16%	12%
\$100,000+	32%	39%	24%	20%
\$150,000+	14%	17%	8%	6%



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

Tourists in this niche market tend to be more apt to occupy professional or managerial positions and to be more affluent than are typical American pleasure tourists but closely resemble them in terms of educational achievement. As a group, Backcountry Lodge Guests are less affluent, less well educated, and less apt to be retirees than are *typical* U.S. tourists to British Columbia.

Compared to the U.S. adult population as a whole, Backcountry Lodge Guests tend to have higher incomes, are more apt to be university graduates and to be in executive, managerial or professional jobs.

### 3. Life Stage

Consistent with their ages, Backcountry Lodge Guests are parents (50%) or, less commonly, a partner in a couple (38%). They live in households of about three people, on average. Their life stage and household size are very similar to *all* American tourists but, predictably in light of the age differences, differ from the U.S. market British Columbia attracts. Somewhat fewer Backcountry Lodge Guests are *retired older couples* than are *typical* tourists to the province.

TABLE 4: HOUSEHOLD CHARACTERISTICS	Backcountry Lodge Guests	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<b>HOUSEHOLD SIZE</b>			
1 person	9%	14%	12%
2 people	38%	46%	34%
3 person	17%	15%	19%
4 people	20%	14%	20%
5+ people	15%	9%	14%
Average (all ages)	3.0	2.6	3.0
<b>LIFESTAGE<sup>1</sup></b>			
Young singles	2%	3%	3%
Middle singles	5%	7%	6%
Older singles	2%	4%	3%
Young couple	11%	12%	11%
Working older couple	15%	18%	13%
Retired older couple	11%	16%	9%
Young parent	10%	7%	13%
Middle parent	11%	5%	11%
Older parent	29%	23%	28%
Any singles	9%	14%	12%
Any couples	38%	46%	34%
Any parent	50%	35%	51%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 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 U.S. Backcountry Lodge Guests indicated that they have taken recent vacations within the U.S.A. and almost one-half claim to travel *only* within their own country (see Table 5). One-third of them have been to Canada on a recent overnight pleasure trip (32%), suggesting that Canada is a particularly attractive destination for these wilderness lodge enthusiasts. Why? Because only about 1-in-8 U.S. pleasure tourists as a whole have been to Canada recently (13%).

While especially successful in attracting Backcountry Lodge Guests vis à vis the general travelling public in the U.S., Canada shares this distinction with other foreign destinations, albeit, at lower rates. Backcountry Lodge Guests are simply more apt to travel outside the U.S.A. than are Americans in general.

Key foreign competitive destinations for the sector include Mexico (18%), the Caribbean (15%) and Europe (12%). Canada surpasses all of these foreign destinations, leaving the U.S. itself as the primary competitor for the backcountry lodging market: as noted above, half of the Americans in this market travel *only* in the U.S.

#### Note to Readers

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

In other words, American Backcountry Lodge Guests claim to have taken an overnight trip motivated by a stay in a wilderness lodge or outpost 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, Lodge Guests may or may not have been at a wilderness lodge or outpost in a particular country, province or state they have visited recently for an overnight pleasure trip.

**TABLE 5: COMPETITIVE DESTINATIONS  
WORLDWIDE\***

	Backcountry Lodge Guests	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<b>Canada</b>	<b>32%</b>	<b>100%</b>	<b>13%</b>
<b>U.S.A.</b>	<b>99%</b>	<b>100%</b>	<b>98%</b>
<b>Other Countries (NET)</b>	<b>35%</b>	<b>52%</b>	<b>26%</b>
Mexico	18%	27%	11%
Caribbean	15%	24%	11%
Europe	12%	21%	7%
South/Central America	6%	9%	3%
Asia	4%	7%	2%
Africa	4%	2%	1%
Australia/New Zealand	2%	3%	1%
<b>Destination patterns</b>			
<b>Only U.S.A.</b>	<b>48%</b>	<b>-</b>	<b>67%</b>
U.S.A. & Canada only	16%	48%	7%
U.S.A. & Mexico only	4%	-	5%
U.S.A. & Canada & Other Countries	17%	51%	5%
U.S.A. & Other Countries only (not Canada or Mexico)	9%	-	11%

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

## B. Canadian Destinations

Almost one-fifth of Backcountry Lodge Guests have had some travel experience in British Columbia over a ten-year period (18%) and about half this proportion, or 1-in-12, are *recent* pleasure tourists in the province (8%) (see Table 6). As noted earlier, however, these Backcountry Lodge Guests may or may not have gone to a wilderness lodge or outpost in British Columbia or any other specific destination they claim to have visited recently.

**Ontario** is the principle Canadian competitor for these American travellers. Over a two-year period, this central Canadian province attracted almost three times as many Backcountry Lodge Guests (22%) as did British Columbia (8%). **Quebec** is also a source of competition within this market (9%), attracting them at about the same rate as British Columbia.

**TABLE 6: COMPETITIVE CANADIAN DESTINATIONS\***

	Backcountry Lodge Guests	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<b>British Columbia</b>			
Any purpose, past 10 years	18%	100%	9%
Any purpose, past 2 years	10%	100%	4%
<b>Pleasure, past 2 years</b>	<b>8%</b>	<b>100%</b>	<b>3%</b>
<b>Overnight Pleasure Trips in Past 2 Years to . . .</b>			
Atlantic Canada	5%	8%	2%
Quebec	9%	9%	3%
Ontario	22%	17%	7%
Man/Sask	5%	7%	1%
Alberta	4%	15%	1%
Yukon	2%	9%	*

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 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 Backcountry Lodge Guests (see Table 7). Information on visitation by these travellers to *all* states, including their “home state” can be found in the detailed tabulations.<sup>14</sup>

Whether to stay in a backcountry lodge or to obtain any other tourism experience, Backcountry Lodge Guests are drawn from their home state to **sun/sea** destinations within the U.S. at a high rate. Collectively, these destinations, including Florida, California, and Nevada attract three-fifths of Backcountry Lodge Guests for overnight pleasure trips. On a state-by-state basis, **Florida**, followed by **California**, **Nevada** (more likely for gambling than backcountry lodging experiences) and **New York** are the most popular U.S. destinations for Backcountry Lodge Guests when travelling outside their home state. As such, these states represent stiff competition for British Columbia’s wilderness lodging properties.

To assess the impact of state residents travelling *within* their own state, the U.S. destination choices of Backcountry Lodge Guests are show 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>15</sup>
Florida	24%	28%
<b>California</b>	<b>18%</b>	<b>30%</b>
Nevada	18%	19%
New York State	17%	19%

When residents are included, California captures almost one-third of the entire American Lodge Guest market (on trips that may or may not have included a stay in a wilderness lodge or outpost). British Columbia will, needless to say, be competing with California as a backcountry lodging destination for California residents and for the Backcountry Lodge Guests who live in other U.S. states.

<sup>14</sup> See Volumes 1 – 4, Table 47.

<sup>15</sup> See above.

**TABLE 7: OUT-OF-STATE U.S. DESTINATIONS\* (Excluding "Own State")**

	<b>Backcountry Lodge Guests</b>	<b>All U.S. Tourists</b>	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<b>Sun/Sea States (S)</b>	<b>60%</b>	<b>75%</b>	<b>54%</b>
<i>In rank order by Lodge Guests</i>			
Florida (S)	24%	25%	23%
California (S)	18%	32%	13%
Nevada (S)	18%	28%	14%
New York State	17%	19%	11%
Tennessee	16%	9%	9%
Arizona (S)	15%	23%	9%
Colorado	15%	18%	7%
Illinois	15%	14%	8%
North Carolina	15%	9%	8%
Georgia	13%	9%	8%
South Carolina (S)	13%	7%	7%
Washington D.C.	13%	13%	7%
Alaska	11%	31%	3%
Missouri	11%	9%	6%
Montana	11%	13%	3%
New Mexico (S)	11%	10%	4%
Pennsylvania	11%	12%	9%
Texas (S)	11%	13%	7%
Utah	11%	12%	4%
Minnesota	10%	7%	4%
Oregon	10%	26%	4%
Wisconsin	10%	8%	5%
Wyoming	10%	10%	3%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 48. \*Out-of-state locations visited on overnight pleasure trip, past two years. States displayed represent destinations visited by at least 10% of Lodge Guests. "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. Backcountry Lodge Guests the first consideration in planning their most recent summer and/or winter trip was **destination** (58%) (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 (28%) and one-fifth begin with the **activities** they want to enjoy while on their trip (22%). 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). Backcountry Lodge Guests also put a premium on destination choice *per se*, with 7-in-10 claiming that it is *extremely* or *very important* to them.

**TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION**

	Backcountry Lodge Guests	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<b>First Consideration for Most Recent Summer/Winter Trip (NET)*</b>			
Start with destination	58%	72%	62%
Start with activities	22%	16%	13%
Start with type of vacation experience	28%	19%	20%
Look for package deal	3%	3%	2%
<b>Importance of Destination</b>			
Extremely/Very Important	71%	73%	67%
Extremely important	35%	31%	29%
Very important	36%	42%	39%
Average**	4.0	4.0	3.9

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 22, 24.

\*Based on respondents who reported taking a summer and/or winter overnight pleasure trip in past two years. \*\*Average based on assigned values of 5 for "extremely important" to 1 for "not at all important". Averages are calculated only on those volunteering an opinion. Percentages for "first consideration" do not add to 100% because not all response categories are shown. "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>16</sup>

Backcountry Lodge Guests are very similar to American overnight pleasure travellers as a whole in terms of the conditions they accord *high importance* when selecting a destination. Like other American tourists, Backcountry Lodge Guests put *feeling safe* at the top of their list (67%) (see Table 9).

About half of them also want a destination with *many things for adults to see and do* (53%) and *convenient access by car* (51%). Over one-third want the destination to offer *mid-range lodging*. Consistent with their interest in feeling safe, Lodge Guests, like *all* U.S. tourists to any destination, also want to travel in environments that pose *no health concerns* (37%).

### Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 Lodge Guests<sup>17</sup>

		U.S. Pleasure Tourists	
	Lodge Guests	To British Columbia	Total
Feeling safe	67%	67%	73%
Lots for adults to see/do	53%	50%	48%
Convenient access by car	51%	35%	51%
No health concerns	40%	40%	43%
Mid-range accommodation	37%	37%	33%

Availability of *information on the internet* (31%) and *low cost travel packages* (30%) are salient factors in a destination choice for about 3-in-10 Lodge Guests. One-quarter of these tourists put a priority on *direct air access* (26%), *budget lodging* (26%) and *familiarity with the culture and language* of the place they are visiting (24%) when selecting a destination.

<sup>16</sup> “Highly important”, “Somewhat important”, and “Of no importance”.

<sup>17</sup> See Table 9 for full array of considerations deemed “highly important” and “of no importance”.

**TABLE 9: CONDITIONS FOR SELECTING A DESTINATION**

	Backcountry Lodge Guests	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<b>Bold rows are proportion stating "Highly Important".</b>			
<i>In rank order by Lodge Guests</i>			
<b>Feeling safe</b>	<b>67%</b>	<b>67%</b>	<b>73%</b>
Of no importance	4%	2%	2%
<b>Lots for adults to see/do</b>	<b>53%</b>	<b>50%</b>	<b>48%</b>
Of no importance	7%	4%	5%
<b>Convenient access by car</b>	<b>51%</b>	<b>35%</b>	<b>51%</b>
Of no importance	7%	12%	7%
<b>No health concerns</b>	<b>40%</b>	<b>40%</b>	<b>43%</b>
Of no importance	15%	14%	14%
<b>Mid-range accommodation</b>	<b>37%</b>	<b>37%</b>	<b>33%</b>
Of no importance	10%	9%	13%
<b>Information available on internet</b>	<b>31%</b>	<b>28%</b>	<b>28%</b>
Of no importance	24%	23%	24%
<b>Low cost packages available</b>	<b>30%</b>	<b>21%</b>	<b>32%</b>
Of no importance	20%	26%	18%
<b>Direct access by air</b>	<b>26%</b>	<b>34%</b>	<b>26%</b>
Of no importance	24%	14%	25%
<b>Budget accommodation</b>	<b>26%</b>	<b>22%</b>	<b>29%</b>
Of no importance	19%	27%	21%
<b>Familiar with culture &amp; language</b>	<b>24%</b>	<b>12%</b>	<b>23%</b>
Of no importance	21%	24%	17%
<b>Lots for children to see/do</b>	<b>21%</b>	<b>10%</b>	<b>20%</b>
Of no importance	55%	71%	55%
<b>Great shopping</b>	<b>15%</b>	<b>11%</b>	<b>16%</b>
Of no importance	45%	44%	36%
<b>Camping</b>	<b>13%</b>	<b>9%</b>	<b>8%</b>
Of no importance	52%	63%	65%
<b>Very different culture than own</b>	<b>12%</b>	<b>11%</b>	<b>8%</b>
Of no importance	42%	34%	48%
<b>Disabled-person-friendly</b>	<b>11%</b>	<b>8%</b>	<b>9%</b>
Of no importance	69%	77%	71%
<b>Convenient access by train/bus</b>	<b>10%</b>	<b>9%</b>	<b>8%</b>
Of no importance	49%	45%	54%
<b>Luxury accommodation</b>	<b>10%</b>	<b>9%</b>	<b>9%</b>
Of no importance	53%	48%	54%
<b>Have friends or relatives there</b>	<b>8%</b>	<b>7%</b>	<b>14%</b>
Of no importance	60%	64%	55%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 25. **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 Backcountry Lodge Guests are most enthusiastic about Hawaii as an *appealing destination* for pleasure travel. They accord this tropical state a rating of 8.3 on a ten-point scale (see Table 10).<sup>18</sup> Though significantly lower than Hawaii's, moderately favourable ratings are accorded a host of destinations, including British Columbia (6.9). Other destinations at parity with British Columbia for overall appeal include Colorado (7.2), California (7.1), Florida (6.9) and Arizona (6.9). At 6.9, British Columbia is rated comparably to Ontario (6.8) but higher than all other *Canadian* destinations by Backcountry Lodge Guests.

Despite British Columbia's moderate success among those offering an appraisal, it is important to note that about one-quarter of U.S. Backcountry Lodge Guests refrain from rating the province, presumably because they know too little about the destination to offer an opinion about its touristic appeal.

#### Summary: Five Highest Appeal Destinations among Lodge Guests<sup>19</sup>

	U.S. Pleasure Tourists		
	<u>Lodge Guests</u>	<u>To British Columbia</u>	<u>Total</u>
Hawaii	8.3	8.5	8.4
Colorado	7.2	7.5	7.1
California	7.1	7.8	7.3
<b>British Columbia</b>	<b>6.9</b>	<b>8.7</b>	<b>6.2</b>
Florida	6.9	6.8	7.3
Arizona	6.9	7.0	6.6

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 Backcountry Lodge Guests (6.9) or all U.S. pleasure travellers (6.2), most of whom have no direct experience with British Columbia.

Among the small group of Backcountry Lodge Guests **who have been to British Columbia in the past two years or so**, the province achieves a rating of 8.9, surpassing

<sup>18</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>19</sup> See Table 10 for full array of average ratings and proportion unable/unwilling to rate each destination.

Hawaii.<sup>20</sup> The challenge, of course, is getting these backcountry lodge enthusiasts to the province!

**TABLE 10: APPEAL OF VARIOUS DESTINATIONS**

	Backcountry Lodge Guests	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<i><b>Bold rows are average ratings*</b></i>			
<b>British Columbia</b>	<b>6.9</b>	<b>8.7</b>	<b>6.2</b>
No rating provided	23%	2%	31%
<b>Newfoundland &amp; Labrador</b>	<b>5.7</b>	<b>6.0</b>	<b>4.8</b>
No rating provided	35%	29%	42%
<b>Nova Scotia</b>	<b>6.3</b>	<b>6.7</b>	<b>5.5</b>
No rating provided	30%	24%	35%
<b>New Brunswick</b>	<b>5.6</b>	<b>6.1</b>	<b>4.9</b>
No rating provided	35%	31%	43%
<b>Prince Edward Island</b>	<b>6.3</b>	<b>6.9</b>	<b>5.6</b>
No rating provided	31%	25%	38%
<b>Quebec</b>	<b>6.1</b>	<b>6.8</b>	<b>5.8</b>
No rating provided	19%	18%	28%
<b>Ontario</b>	<b>6.8</b>	<b>6.8</b>	<b>6.1</b>
No rating provided	16%	19%	25%
<b>Manitoba</b>	<b>5.6</b>	<b>5.6</b>	<b>4.7</b>
No rating provided	34%	31%	43%
<b>Saskatchewan</b>	<b>5.8</b>	<b>5.6</b>	<b>4.8</b>
No rating provided	32%	29%	42%
<b>Alberta</b>	<b>6.2</b>	<b>6.8</b>	<b>5.2</b>
No rating provided	30%	22%	38%
<b>Yukon</b>	<b>6.2</b>	<b>6.3</b>	<b>5.1</b>
No rating provided	30%	24%	37%
<b>Northwest Territories</b>	<b>6.4</b>	<b>6.1</b>	<b>5.1</b>
No rating provided	29%	26%	36%
<b>New York State</b>	<b>6.3</b>	<b>7.0</b>	<b>6.6</b>
No rating provided	8%	8%	10%
<b>Colorado</b>	<b>7.2</b>	<b>7.5</b>	<b>7.1</b>
No rating provided	8%	8%	11%
<b>Florida</b>	<b>6.9</b>	<b>6.8</b>	<b>7.3</b>
No rating provided	4%	6%	6%
<b>California</b>	<b>7.1</b>	<b>7.8</b>	<b>7.3</b>
No rating provided	5%	3%	7%
<b>Hawaii</b>	<b>8.3</b>	<b>8.5</b>	<b>8.4</b>
No rating provided	6%	5%	8%
<b>Arizona</b>	<b>6.9</b>	<b>7.0</b>	<b>6.6</b>

<sup>20</sup> See detailed tables, Volume2, page 26-10 for figures. Interpret with caution because of small base size.

No rating provided

7%

6%

10%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 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 Lodge Guests' lists for having *many good reasons* to visit on a pleasure trip (see Table 11).<sup>21</sup> Specifically, Hawaii tops the list with about 2-in-3 Backcountry Lodge Guests stating that there are many good reasons to go to this tropical destination. British Columbia is well down on the list, with only one-third of Backcountry Lodge Guests claiming that there are *many* good reasons to go to this province.

Led by Hawaii, California, Florida and Colorado far surpass British Columbia as a destination with many reasons to visit according to Lodge Guests.

**Summary: Destinations With At Least One-Half Saying *Many Good Reasons to Visit*** (in rank order within each category)<sup>22</sup>

<u>Lodge Guests</u>		<u>U.S. Pleasure Tourists</u>			
		<u>To British Columbia</u>		<u>Total</u>	
Hawaii	68%	<b>British Columbia</b>	<b>73%</b>	Hawaii	67%
California	51%	Hawaii	72%	Florida	54%
		California	63%	California	53%
		Less than One-Half			
Florida	49%			Colorado	41%
Colorado	47%			New York State	40%
New York State	38%			Arizona	31%
Arizona	36%			<b>British Columbia</b>	<b>21%</b>
<b>British Columbia</b>	<b>32%</b>				

Among the comparatively few Backcountry Lodge Guests who have recently travelled to British Columbia, however, almost 9-in-10 say that there are many good reasons to go (88%).<sup>23</sup> As with the *appeal* rating discussed in the previous chapter, the province

<sup>21</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>22</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>23</sup> See Detailed Tables, Volume 2, page 27-4. Interpret with caution because of extremely small base size.

has a much more favourable image among those who have experienced what it can offer.

**TABLE 11: NUMBER OF REASONS TO VISIT  
VARIOUS DESTINATIONS**

	<b>Backcountry Lodge Guests</b>	<b>All U.S. Pleasure Tourists</b>	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<i>% stating "MANY" good reasons to visit</i>			
<b>British Columbia</b>	<b>32%</b>	<b>73%</b>	<b>21%</b>
<i>Rank order among Lodge Guests</i>			
Hawaii	68%	72%	67%
California	51%	63%	53%
Florida	49%	45%	54%
Colorado	47%	46%	41%
New York State	38%	47%	40%
Arizona	36%	35%	31%
Ontario	29%	28%	20%
Northwest Territories	22%	20%	11%
Quebec	20%	33%	18%
Yukon	20%	23%	11%
Nova Scotia	19%	25%	13%
Prince Edward Island	16%	25%	13%
Alberta	16%	27%	10%
Saskatchewan	13%	10%	6%
Newfoundland & Labrador	12%	16%	8%
Manitoba	11%	9%	5%
New Brunswick	10%	16%	7%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 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>24</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 **staying in a wilderness lodge or outpost** in the past two years, this activity is not linked to any specific destination they claim to have visited over the same time period. Thus, a trip prompted by fly-in or drive-in outposts or lodges 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* Backcountry Lodge Guests 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 Backcountry Lodge Guests 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>24</sup> Presumably, “these trips” are those on which the specific activity took place.



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

### **1. Lodge Guests' Cross-Over with Other Trip Activity Sectors**

As demonstrated by their representation in other activity-based tourism sectors, Backcountry Lodge Guests are multi-dimensional travellers.<sup>25</sup> About two-fifths of them are also **Campers/RVers** and/or **History/Heritage Tourists** and about one-third are **Anglers** (see Table 12). One-quarter of them correspond to the activity profile of **Self-Guided Overnight Touring Travellers** and/or **Hikers** and one-fifth are **Divers/Snorkellers**.

By indexing the share of Backcountry Lodge Guests in each other activity sector to the American pleasure market in total, Lodge Guests' predisposition toward various outdoor and cultural/heritage activities becomes very clear.

- Compared to the U.S. travelling public as a whole, Backcountry Lodge Guests are at least **five times** as likely to be River Rafters, Nordic Skiers, Snowmobilers, Sea Kayakers, or obtain Aboriginal culture and heritage experiences when they travel.
- They are also about **four times** as likely to take trips to do cycling/mountain biking, camping, and/or hiking as are typical American pleasure travellers.
- Backcountry Lodge Guests are **three times** more apt to take trips in order to go diving or snorkelling or to see historic sites, museums and other history/heritage attractions than is the American travelling public as a whole.

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<sup>25</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 Backcountry Lodge Guests 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.

**TABLE 12: CROSS-OVER WITH OTHER  
SELECTED TRIP ACTIVITY SECTORS**

	Backcountry Lodge Guests	All U.S. Pleasure Tourists		
	Total (783)	To British Columbia (1,706)	Any Destination (45,697)	Index Lodge Guests to All U.S. Tourists
Unweighted base				
Weighted, Projected	2,873,000	5,340,000	166,003,000	
<i>Rank order among Lodge Guests</i>				
Backcountry Lodge Guests	100%	4%	2%	5,000
Campers/RVers	44%	16%	11%	400
History and Heritage Tourists	42%	22%	14%	300
Anglers	31%	11%	8%	388
Self-Guided Overnight Touring Travellers	26%	26%	11%	236
Hikers	24%	11%	6%	400
Divers & Snorkellers	21%	7%	3%	367
Aboriginal Activity Tourists	16%	9%	3%	533
Alpine Skiers	14%	13%	6%	233
River Rafter	12%	3%	1%	800
Cyclists/Mountain Bikers	9%	6%	2%	450
Golfers	7%	7%	4%	175
Nordic Skiers	7%	5%	1%	700
Snowmobilers	7%	2%	1%	700
Sea Kayakers	2%	1%	*	667

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 1. \*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 Columbia tourism industry.

## 2. Major Trip Activity Groups

Like most tourists Backcountry Lodge Guests take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.<sup>26</sup>

- In addition to taking trips in order to go to wilderness lodges or outposts, almost 8-in-10 of these Americans take trips in order to engage in at least one **land-based outdoor activity** such as hiking, bird watching or viewing land-based animals.
- About two-thirds of them have been motivated by **water-based outdoor activities** such as fishing, kayaking or canoeing or snorkelling;
- Approximately one-half have taken recent overnight pleasure trips in order to engage in a **cultural activity** such as going to well-known historic sites, museums, or cultural performances or to stay in a seaside or lakeside **resort** or spa.
- **Entertainment** activities such as theme parks, casinos and movies; **dining and wine-related** experiences; or to have a **camping** experience<sup>27</sup> have each motivated trips by about two-fifths of Backcountry Lodge Guests.
- Going to **fairs or festivals** or to **spectator sporting events** such as professional baseball or football games are reasons to take overnight pleasure trips for about one-third.
- Alpine skiing and other **outdoor winter activities** are trip drivers for one-quarter of Lodge Guests.

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, more Backcountry Lodge Guests *participated* in at least one land-based outdoor activity while on a recent overnight pleasure trip (92%) than claim to have taken a trip motivated by one of these activities (80%).

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<sup>26</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 Backcountry Lodge Guests 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>27</sup> Included in land-based outdoor activities.

Similarly, over 8-in-10 Backcountry Lodge Guests went to a museum, gallery or cultural performance on a recent trip but only about 5-in-10 of them took the trip in order to do so. Food and wine experiences are especially likely to be “one-of-many” trip activities (86%) but the driving force behind a trip for relatively few Backcountry Lodge Guests (41%).

Compared to *all* U.S. overnight pleasure travellers, Backcountry Lodge Guests are, for the most part, at least twice as likely to identify activities in each of the major activity groups as ones that *motivated* recent trips (main reason) or were engaged in on these trips (any participation).

	<u>Main Reason</u>		<u>Any Participation</u>	
	Lodge Guests	All U.S. Pleasure Tourists	Lodge Guests	All U.S. Pleasure Tourists
<u>Major Activity Group</u>				
Outdoor Water Based	64%	30%	82%	56%
Outdoor Land Based	80%	30%	92%	63%
Theme/Amusement Parks/Movies	43%	22%	59%	43%
Cultural/Learning & Events	56%	23%	82%	61%
Outdoor Winter	24%	8%	30%	12%

These high levels of differentiation from *typical* American travellers, especially with respect to outdoor land and winter activities, are clear evidence of Lodge Guests’ distinctive tourism interests.

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

<b>TABLE 13: MAJOR ACTIVITY GROUPS – MAIN &amp; ANY</b>		<b>Backcountry Lodge Guests Overnight Trip Activities</b>	
		<b>Main Reason</b>	<b>Any Participation</b>
Unweighted base		(783)	(783)
Weighted, Projected		2,873,000	2,873,000
<b>Outdoor Land Based Activities</b>		80%	92%
Camping		43%	54%
<b>Outdoor Water Based Activities</b>		64%	82%
<b>Cultural/Learning Activities &amp; Events</b>		56%	82%
<b>Resorts</b>		50%	62%
<b>Theme/Amusement Parks/Movies (Entertainment)</b>		43%	59%
<b>Food &amp; Wine</b>		41%	86%
<b>Fairs/Festivals</b>		37%	63%
<b>Spectator Sports</b>		34%	46%
<b>Outdoor Winter Activities</b>		24%	30%

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

### 3. Individual Trip Activities: The Outdoors

When taken as a whole, the *outdoor* activity profile of Backcountry Lodge Guests suggests a group of tourists seeking comparatively sedentary experiences and passive interactions with nature (see Table 14).<sup>28</sup> They seem to want to be *in nature* rather than to *engage* nature, with some obvious exceptions such as fishing and hunting. Perhaps these tourists rely on a variety of accommodation options – wilderness lodges and outposts along with campgrounds and various types of resorts – as a way to appreciate natural settings with relatively little effort on their part. *Missing* as prominent trip drivers for Backcountry Lodge Guests are outdoor activities such as climbing, backpacking, skiing, paddling or rafting.

- Instead, two-fifths of Backcountry Lodge Guests take trips to camp (43%), generally within national, provincial or state nature parks or to simply visit the parks (35%).
- Fishing, especially in fresh water, seeing well-known natural wonders, flora and fauna are also driving forces behind recent overnight pleasure trips for about 3-in-10 Lodge Guests.
- Along with their interest in taking trips to stay in *wilderness lodges or outposts*, close to 3-in-10 Backcountry Lodge Guests take pleasure trips to stay at *lake/riverside* or *seaside resorts*.
- One-quarter of them take trips in order to take day hikes and about one-fifth are motivated by the opportunity to sunbathe on a beach.

#### Markets-within-markets

The comparatively passive activity profile described above likely fits the majority of Backcountry Lodge Guests who go to *drive-in* wilderness lodges rather than *fly-in* outposts or lodges (see figures on the following page). There are, however, sub-markets within Lodge Guests.

For example, *hunting* and especially *big game hunting* motivate trips for over one-fifth of Backcountry Lodge Guests – a rate that is dramatically higher than that evident among *all* U.S. overnight pleasure travellers (4% and 3% respectively).<sup>29</sup> Similarly, Backcountry Lodge Guests are much more likely to take a trip to fish (32%) and go

<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 Backcountry Lodge Guests 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> Hunting is not included in Table 14 because the activities presented in the summary table required that one-third of Backcountry Lodge Guests declare an activity as a main reason for an overnight pleasure trip.

*trophy fishing* (4%) than is the case among typical U.S. overnight pleasure travellers (8%, less than 1% respectively). These anglers or hunters may be concentrated among Backcountry Lodge Guests who seek *fly-in* wilderness outpost or lodge experiences in order to hunt or fish in wilderness settings. [See summary table below.]

	<u>Main Reason</u>		<u>Any Participation</u>	
	Lodge Guests	All U.S. Pleasure Tourists <sup>30</sup>	Lodge Guests	All U.S. Pleasure Tourists <sup>31</sup>
<b>Backcountry Lodge Guests</b>	<b>100%</b>	<b>2%</b>	<b>100%</b>	<b>4%</b>
Wilderness lodge – drive to by car	76%	1%	77%	4%
Remote or fly-in wilderness <i>lodge</i>	22%	*	24%	1%
Remote or fly-in wilderness <i>outpost</i>	14%	*	15%	*
Hunting – Any	22%	4%	26%	5%
Hunting – Big game	18%	3%	21%	4%
Fishing	32%	8%	48%	19%
Trophy fishing	4%	*	5%	1%

As is evident from the figures shown above, Americans who go to wilderness lodges as the *main reason* for a trip are the same people who rely on this form of accommodation as one of their activities (*any*). In other words, being at a wilderness lodge *is* the trip's *core* experience.

In contrast, many more Backcountry Lodge Guests engage in a variety of other outdoor activities than consider these activities to be the primary motivation for their recent overnight pleasure trips. For example, about half of them have been to a national or state/provincial nature park, done some fishing and/or wildlife viewing, primarily of land-based animals, on recent overnight pleasure trips.

	<u>Main Reason</u>		<u>Any Participation</u>	
	Lodge Guests	All U.S. Pleasure Tourists	Lodge Guests	All U.S. Pleasure Tourists
Nature park	35%	10%	51%	27%
Flora/fauna viewing	28%	5%	50%	21%
Camping - public campground	34%	7%	43%	17%
Sunbathing or sitting on a beach	21%	13%	41%	29%
Swimming in oceans	16%	9%	40%	28%
Lakeside/riverside resort	29%	6%	39%	8%

<sup>30</sup> \*represents values of less than 0.5%.

<sup>31</sup> \*represents values of less than 0.5%.

Compared to the typical U.S. overnight pleasure traveller, a Lodge Guest is more likely to identify *passive* and *active* outdoor activities including fishing, camping, hunting and staying at a lake or riverside resort 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 is further evidence that Backcountry Lodge Guests represent a distinctive market. The findings also suggest that there are sub-markets within the larger Backcountry Lodge Guests market – the big game hunter or sport fisherman or woman at a fly-in lodge or outpost likely represents a different niche than the Lodge Guest who is staying at a drive-in wilderness lodge and enjoying a natural setting in a relatively passive way.

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\***

	Lodge Guests Overnight Trip Activities	
	Main Reason	Any Participation
Unweighted base	(783)	(783)
Weighted, Projected	2,873,000	2,873,000
<i>In rank order by main reason within each subgroup</i>		
<b>Backcountry Lodge Guests</b>	<b>100%</b>	<b>100%</b>
Wilderness lodge you can drive to by car	76%	77%
Remote or fly-in wilderness lodge	22%	24%
Remote or fly-in wilderness outpost	15%	15%
<b>Camping</b>	<b>43%</b>	<b>54%</b>
In public campground in national/state/provincial park	34%	43%
<b>Nature park</b>	<b>35%</b>	<b>51%</b>
<b>Fishing</b>	<b>32%</b>	<b>48%</b>
Fresh water	29%	44%
<b>Lakeside/riverside resorts (lodging)</b>	<b>29%</b>	<b>39%</b>
<b>Well known natural wonders</b>	<b>29%</b>	<b>49%</b>
<b>Flora/fauna viewing</b>	<b>28%</b>	<b>50%</b>
Wildlife viewing – land based animals	17%	37%
Whale watching	12%	22%
Wildflowers/flora	12%	24%
Bird watching	10%	24%
<b>Seaside resorts (lodging)</b>	<b>27%</b>	<b>36%</b>
<b>Hiking</b>	<b>24%</b>	<b>48%</b>
Same day excursion on overnight trip	18%	44%
<b>Sunbathing or sitting on a beach</b>	<b>21%</b>	<b>41%</b>
<b>Swimming in oceans</b>	<b>16%</b>	<b>40%</b>
<b>Swimming in lakes</b>	<b>13%</b>	<b>34%</b>

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

\*Activities shown here are those that are named by at least about 1-in-3 Backcountry Lodge Guests 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, Backcountry Lodge Guests 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>32</sup> Entertainment-oriented activities in general, and particularly theme parks and casinos are, however, trip motivators for many Lodge Guests' trips (see Table 15). As noted previously, spectator sporting events are also common trip drivers, attracting about 1-in-3 Lodge Guests.

##### Culture

Backcountry Lodge Guests are much 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, over half have sought out a well-known historic site or strolled around a city to observe its buildings and architecture on recent pleasure trips but only about 1-in-4 have taken a trip in order to do engage in these activities. Similar patterns are evident for seeing other historic sites, attending arts performances such as classical music concerts, opera or ballet and going to general history museums. These tourists are about 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

Backcountry Lodge Guests are especially drawn by amusement parks (Main, 35%; Any, 46%), and, to a lesser extent, by casinos (Main, 27%; Any, 46%). Farmers' markets or country fairs, movies, zoos, aquariums and fireworks displays also attract about one-third of Backcountry Lodge Guests as things to see and do on recent overnight pleasure trips. 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.

##### Food

Similar to many entertainment-oriented activities, dining out at restaurants offering *local* ingredients and cuisine (Main, 21%; Any, 69%), other high-end dining experiences (Main, 12%; Any, 43%), and visiting local outdoor cafes (Main, 12%; Any, 46%) are much more common trip experiences (any) than trip drivers for Lodge Guests.

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<sup>32</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 Backcountry Lodge Guests 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.

### **Shopping**

Shopping for apparel, books or music and local arts and crafts is a common trip pastime for Backcountry Lodge Guests 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, Backcountry Lodge Guests are more likely to engage in outdoor activities or take trips for these activities. While not to the same extent, these wilderness lodge 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).

	<b><u>Main Reason</u></b>		<b><u>Any Participation</u></b>	
		All U.S.		All U.S.
<b><u>Other Activities</u></b>	<b>Lodge Guests</b>	Pleasure Tourists	<b>Lodge Guests</b>	Pleasure Tourists
Amusement parks	35%	18%	46%	34%
Casinos	27%	14%	46%	36%
Restaurants - local ingredients/recipes	21%	6%	69%	58%
Strolling in a city to see architecture	22%	7%	52%	34%
Well known historic sites	26%	8%	53%	30%
Shopping - Clothing, shoes, jewellery	18%	5%	58%	50%

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\***

	<b>Backcountry Lodge Guests Overnight Trip Activities</b>	
	<b>Main Reason</b>	<b>Any Participation</b>
Unweighted base	(783)	(783)
Weighted, Projected	2,873,000	2,873,000
<i>In rank order by main reason within each subgroup</i>		
<b>Cultural &amp; Heritage</b>		
Historic sites - well known	26%	53%
Strolling around a city to see architecture	22%	52%
Historic sites -other	21%	45%
Performing Arts (Any)	19%	37%
Museum - General history	15%	37%
<b>Entertainment</b>		
Amusement park	35%	46%
Casino	27%	46%
Zoos	18%	35%
Aquariums	17%	35%
Firework displays	17%	34%
Farmers' markets or country fairs	16%	38%
Movies/cinema	14%	38%
<b>Food &amp; Wine</b>		
Dining – restaurants offering local ingredients and recipes	21%	69%
Local outdoor cafes	12%	46%
Dining - other high-end (not with international reputation)	12%	43%
<b>Shopping</b>		
Clothing, shoes, jewellery	18%	58%
Antiques	16%	41%
Local arts & crafts studios	15%	51%
Bookstores or music stores	15%	51%

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

\*Activities shown here are those that are named by at least 1-in-3 Backcountry Lodge Guests 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 Backcountry Lodge Guests are not recent overnight cruise passengers or organized overnight tour participants (see Table 16). Of the 1-in-4 who have taken an overnight cruise in the past two years or so, destinations in the Caribbean are somewhat more popular than are Alaska and other locations.

Equal proportions of Backcountry Lodge Guests claim to have taken an **organized** overnight group tour as to have taken **self-directed** touring trips over a two-year period (26% each). Those who have gone on an overnight organized tour do not display a strong preference for tours to *single* versus *multiple* destinations.

Taking a day tour while on an overnight trip (48%) is about as characteristic of Backcountry Lodge Guests as is taking any type of overnight tour (43%). Unlike overnight tours, however, Backcountry Lodge Guests are somewhat more inclined to take self-directed day tours (37%) than they are to take organized ones (29%).

Favoured themes for organized day excursions include tours around a city and/or the countryside, wilderness or outdoor tours and sightseeing cruises. These same themes are popular among Backcountry Lodge Guests who take *self-directed* day touring excursions.<sup>33</sup>

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<sup>33</sup> See Detailed Tabulations, Volumes 1, 4 page 13-2 for figures.

TABLE 16: CRUISES/GROUP TOURS	Backcountry Lodge Guests	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<b>Took any overnight cruise in past 2 years</b>	<b>27%</b>	<b>49%</b>	<b>17%</b>
<b>Type of Cruise/Destination</b>			
Ocean - Caribbean	12%	19%	9%
Ocean - Other	8%	15%	5%
Ocean - Alaska	7%	29%	3%
Great Lakes	5%	1%	*
<b>Overnight Touring (NET)</b>	<b>43%</b>	<b>48%</b>	<b>20%</b>
Organized Tour	26%	32%	12%
Multiple Location	18%	26%	8%
Single Location	17%	16%	7%
Self-Directed Touring	26%	26%	11%
<b>Same-Day Touring on Overnight Trip (NET)</b>	<b>48%</b>	<b>57%</b>	<b>30%</b>
Self-Directed Touring	37%	38%	20%
Organized Excursion	29%	43%	19%
<b>Type of Organized Day Tour</b>			
<i>Among Organized Day Tour Takers</i>	(100%)	(100%)	(100%)
Countryside	59%	60%	42%
City	57%	69%	54%
Wilderness/outdoor	53%	45%	26%
Sightseeing cruise (day excursion)	44%	50%	34%
Wineries	21%	21%	13%
Casino	19%	18%	14%
Factory	17%	14%	7%
Airplane/helicopter (pilot or passenger)	10%	16%	6%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 12/ 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?

Almost all Backcountry Lodge Guests 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 lodge or outpost guest or is shared with other household members.

TABLE 17: TRAVEL PLANNING	Backcountry Lodge Guests	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<b>Frequency of personal involvement in trip planning, past 2 years</b>			
All	60%	69%	65%
Most	21%	18%	15%
Some	11%	10%	10%
None/not stated	7%	4%	10%
<b>Main responsibility for trip planning</b>			
Respondent	38%	41%	39%
Spouse/partner	16%	20%	17%
Shared with other household member	27%	26%	25%
Other/not stated/not involved in travel planning	19%	13%	19%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 16, 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 Lodge Guests, the **internet** tops the chart (see Table 18). Three-quarters of these tourists rely on the internet for travel information and over half use anecdotal information provided by **friends and relatives** and their own **past experience**. About two-fifths rely on **maps, newspapers** and **official DMO travel guides** 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.

Although not a commonly used source of information, consumer travel shows or sportsmen's shows are more widely used by Backcountry Lodge Guests (12%) than by American overnight pleasure travellers as a whole (2%) or those who have recently travelled to British Columbia (7%).

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

(in rank order in each column)

<u>Lodge Guests</u>	<u>U.S. Pleasure Tourists</u>	
	<u>To British Columbia</u>	<u>Total</u>
Internet website	Internet website	Internet website
Past experience	Past experience	Past experience
Advice of friends/relatives	Advice of friends/relatives	Advice of friends/relatives
Maps	Maps	
Newspapers	Official DMO travel guides	
Official DMO travel guides	Newspapers	
	Auto club	
	Travel agent	

With three-quarters of Backcountry Lodge Guests relying on the internet for travel planning and almost half saying that they *normally* visit **travel websites**, the internet has the greatest reach for wilderness lodges and outfitters in British Columbia. About two-fifths of Backcountry Lodge Guests also claim to watch **televised travel shows** and just under one-third say they frequently read **outdoor activities/sports magazines** such as *Backpacker* or *Outdoor Life* (30%) or, less commonly, general travel magazines such as *Condé Nast* (23%). Readership of the travel section of local daily or weekend newspapers is not especially widespread among Lodge Guests.

Compared to recent American tourists to British Columbia, Backcountry Lodge Guests are more likely to read affinity group magazines such as *Outdoor Life* and are as

inclined to read generic *travel* magazines.<sup>34</sup> Both of these types of magazines enjoy more widespread popularity among Backcountry Lodge Guests than they do within the general U.S. travelling public (11%, each).

Approximately one-quarter of Backcountry Lodge Guests say they frequently read the **travel section** in their local newspaper's weekend (28%) and/or weekday edition (26%). This level of readership is higher than U.S. overnight pleasure travellers as a whole, but somewhat lower than travel section readership among those who have recently travelled to British Columbia.

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<sup>34</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**

	<b>Backcountry Lodge Guests</b>	<b>All U.S. Pleasure Tourists</b>	
	<b>Total</b>	<b>To British Columbia</b>	<b>Any Destination</b>
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<i>In rank order by Lodge Guests</i>			
<b>SOURCES OF TRAVEL PLANNING INFO</b>			
<b>Internet website</b>	76%	82%	68%
<b>Past experience</b>	60%	60%	49%
<b>Advice of friends/relatives</b>	54%	54%	41%
<b>Maps</b>	43%	49%	29%
<b>Any newspaper</b>	38%	40%	20%
Articles	34%	36%	16%
Advertisements	21%	20%	10%
<b>Official DMO travel guides</b>	37%	42%	18%
<b>Visitor information centres</b>	32%	28%	18%
<b>Travel information in mail</b>	29%	30%	14%
<b>Auto club</b>	29%	40%	22%
<b>Travel agent</b>	25%	38%	17%
<b>Travel guide books</b>	20%	30%	11%
<b>Any television</b>	16%	19%	8%
Programs	15%	17%	6%
Advertisements	6%	6%	4%
<b>Trade, travel, sportsmen's shows</b>	12%	7%	2%
<b>Electronic newsletters via e-mail</b>	11%	12%	5%
<b>TRAVEL MEDIA</b>			
<b>Frequently read newspaper Travel Section</b>			
In weekday editions	26%	34%	16%
In weekend editions	28%	36%	20%
<b>Magazines read in typical month</b>			
Travel	23%	28%	11%
Outdoor activities/sports	30%	16%	11%
<b>Normally watch Travel Shows on TV</b>	42%	48%	29%
<b>Normally visit Travel websites</b>	46%	57%	39%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 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 Backcountry Lodge Guests and tourists who have taken a recent pleasure trip to British Columbia rely on the internet for travel planning. In light of their interest in wilderness lodges and outposts, it is not surprising that hotel/resort sites are the most commonly used websites among Backcountry Lodge Guests who rely on the internet for travel planning (65%) (see Table 19). Other sites used by about 1-in-2 internet users include travel sites such as *Expedia* or *Travelocity* (57%), destination marketing organization sites (51%) and airline sites (47%).

Not surprisingly, **booking** on-line is somewhat less common than is searching for information on the internet. Nonetheless, almost 3-in-5 Backcountry Lodge Guests claim to have made a travel-related booking on line over the past two years or so (57%). As their website preferences would suggest, the most common on-line bookings are accommodation followed by air tickets and, to a lesser degree, car rentals and attractions.

Use of the internet for travel planning and for booking travel arrangements is noticeably more widespread among Backcountry Lodge Guests than among U.S. overnight pleasure travellers as a whole.

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING	Backcountry Lodge Guests	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<b>Used Internet website for travel planning, past 2 years</b>	<b>76%</b>	<b>82%</b>	<b>68%</b>
	(100%)	(100%)	(100%)
<b><u>Internet website(s) used</u></b> (Among Users)			
Hotel/resort	65%	66%	53%
Travel planning/booking	57%	68%	56%
Destination marketing organization	51%	50%	35%
Airline	47%	67%	46%
Attraction	40%	40%	33%
Cruise	18%	35%	12%
Motorcoach	3%	3%	1%
Other	37%	31%	25%
<b>Any Internet Purchases in Past 2 Years</b> (Among All Overnight Pleasure Travellers)	<b>57%</b>	<b>68%</b>	<b>47%</b>
	(100%)	(100%)	(100%)
<b><u>Items Purchased On-Line</u></b> (Among Purchasers)			
Air tickets	65%	86%	71%
Accommodation	79%	77%	72%
Car rental	48%	55%	39%
Tickets for activities/attractions	39%	34%	27%
Package deal (2+ items)	24%	31%	18%
Rail, bus, boat tickets	20%	27%	12%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 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 Backcountry Lodge Guests (see Table 20). Only about 1-in-12 say they relied on a package deal for *all* or *most* of their trips over the past two years or so (7%) and a further 1-in-3 have used package deals for *one* or *some* of these trips (31%).

Most Backcountry Lodge Guests 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.

TABLE 20: PACKAGE DEALS	Backcountry Lodge Guests	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<b>Frequency of Purchasing Packages in Past 2 Years</b>			
Most/all trips	7%	7%	5%
One/some trips	31%	42%	20%
No trips/not stated/not sure	62%	51%	75%
<b>Desired Components of Packages</b> (Among Purchasers of Packages)			
	(100%)	(100%)	(100%)
Accommodation	89%	96%	91%
Transport to destination	80%	89%	85%
Transport at destination	68%	74%	67%
Tickets for activities/attractions	67%	68%	62%
Food and beverage	55%	52%	52%
Other	33%	26%	22%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 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 among Backcountry Lodge Guests are a **break from the day-to-day environment** and the trip's ability to **relieve stress** (see Table 21).<sup>35</sup> Three-quarters of this niche market attach a high level of importance to these attributes. Two-thirds want their vacations to be the basis of lasting **memories** and/or to help **enrich familial relationships** while over half seek opportunities to **see and do something new and different** and to **abandon a fixed schedule**. 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 Lodge Guests, Recent Pleasure Tourists to British Columbia and Any Destination<sup>36</sup>

<u>Lodge Guests<sup>37</sup></u>	<u>U.S. Pleasure Tourists</u>	
	<u>To British Columbia</u>	<u>Total</u>
Break from day-to-day	Break from day-to-day	Break from day-to-day
Relax/relieve stress	Relax/relieve stress	Relax/relieve stress
Memories	Memories	Memories
Relationship - partner/children	New/different	Relationship - partner/children
New/different	Relationship - partner/children	No fixed schedule
No fixed schedule		

While not as widely endorsed as those cited above, **having stories to tell** once the trip is over, **being physically challenged**<sup>38</sup>, and the opportunity to experience **solitude and isolation** are deemed to be highly important benefits of vacations for about one-fifth of Lodge Guests. These are higher levels of endorsement than are found among recent American tourists to British Columbia or the U.S. travelling public as a whole.

<sup>35</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>36</sup> For full array, see Table 21.

<sup>37</sup> Six attributes are listed for Backcountry Lodge Guests because the same proportion (54%) attach *high importance* to a trip's ability to provide *new and different* experiences and *not having a fixed schedule*.

<sup>38</sup> *To be challenged physically/feel physically energized.*

**TABLE 21: BENEFITS SOUGHT FROM PLEASURE TRAVEL** *(Highly important)*

	<b>Backcountry Lodge Guests</b>	<b>All U.S. Pleasure Tourists</b>	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<i>% Stating "Highly Important"</i>			
<i>In rank order by Lodge Guests</i>			
Break from day-to-day environment	73%	62%	72%
Relax/relieve stress	72%	62%	72%
Create lasting memories	66%	60%	58%
Enrich relationship with partner/children	61%	52%	55%
No fixed schedule	54%	41%	53%
See/do something new/different	54%	59%	43%
Keep family ties alive	44%	38%	46%
Enrich perspectives	35%	36%	23%
Knowledge of history, cultures, places	31%	36%	20%
Stimulate mind/intellectual challenge	24%	29%	19%
Stories to share	20%	13%	13%
Physical challenge	20%	14%	12%
Renew personal connections (non-family)	19%	19%	19%
Solitude and isolation	19%	11%	12%
To be pampered	18%	15%	15%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 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 Backcountry Lodge Guests say that they have taken an overnight pleasure trip during the summer months (91%) and 3-in-4 have taken winter trips (74%) (see Table 22). Their *winter* travel is likely related to these travellers' interest in *sun/sea* activities and destinations (e.g., sitting on a beach).

TABLE 22: INCIDENCE OF SUMMER/ WINTER PLEASURE TRIPS	Backcountry Lodge Guests	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected	2,873,000	5,340,000	166,003,000
<b>Took Overnight Pleasure Trip in Past 2 Years</b>			
<b>In . . .</b>			
Summer	91%	90%	82%
Winter	74%	81%	62%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 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 almost 5-in-10 Backcountry Lodge Guests (see Table 23). About 4-in-10 of these tourists are members of a frequent flyer program and about one-quarter 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 but are consistent with those of the American travelling public as a whole. In contrast, Lodge Guests' membership in a nature/environmental club is more prevalent (17%) than is the case for recent British Columbia visitors (9%) or typical American tourists (5%).

TABLE 23: MEMBERSHIPS	Backcountry Lodge Guests	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(783)	(1,706)	(45,697)
Weighted, Projected <i>In rank order by Lodge Guests</i>	2,873,000	5,340,000	166,003,000
Auto club	47%	59%	43%
Frequent flyer program	38%	62%	31%
Hotel/car rental loyalty program	25%	40%	20%
Sports club	24%	26%	16%
Community service club	20%	18%	10%
Nature/environmental club	17%	9%	5%
Book/reading club	17%	13%	11%
Hobby club	11%	9%	6%
Travel club	10%	11%	4%

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



## 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>39</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>39</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

## 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	(45,697)	(45,697)	(1,706)	(1,706)
Weighted, Projected	166,003,000	166,003,000	5,340,000	5,340,000
<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, pages 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	(45,697)	(45,697)	(1,706)	(1,706)
Weighted, Projected	166,003,000	166,003,000	5,340,000	5,340,000
<b>Backcountry Lodge Guests</b>	<b>4%</b>	<b>12%</b>	<b>2%</b>	<b>4%</b>
Wilderness lodge you can drive to by car	3%	9%	1%	4%
Remote or fly-in wilderness <i>lodge</i>	2%	3%	*	1%
Remote or fly-in wilderness <i>outpost</i>	1%	2%	*	*
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, pages 2/11. \*Activities shown here are those that are named by at least 1-in-3 Backcountry Lodge Guests 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	(45,697)	(45,697)	(1,706)	(1,706)
Weighted, Projected	166,003,000	166,003,000	5,340,000	5,340,000
<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, pages 2/11. \*Activities shown here are those that are named by at least 1-in-3 Backcountry Lodge Guests as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.