



RESEARCH SERVICES

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

Focus on Campers and RVers

June 2007

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Acknowledgments

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.

TAMS was a partnership of the following organizations:

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 ¹
Parks Canada	The Government of Yukon
Statistics Canada	The Government of Northwest Territories

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Tourism British Columbia would like to acknowledge that this report was written by Judy Rogers of Research Resolutions Consulting Ltd.

¹ Tourism British Columbia's participation was supported financially by the Ministry of Tourism, Sport and the Arts.

I. Executive Summary

MILLIONS OF AMERICANS TAKE CAMPING TRIPS.

Of the 166.0 million American pleasure tourist market as a whole, almost 1-in-4 or about 38.3 million say they went camping in a public or private campground or in a wilderness setting using a tent, tent trailer, truck camper, travel trailer or motor home (RV) most often. Of this sizeable market, 1-in-25 or approximately 1.7 million say they have taken an overnight pleasure trip to British Columbia over a two-year period.

Campers, as defined in this report, represent a subset of all Americans who take camping trips. They are overnight pleasure travelers who say they recently took a trip *in order to* camp and who generally rely on a tent or tent trailer for shelter. There are approximately 10.0 million American Campers, or about six percent of the 166.0 million American pleasure travellers. Of these Campers, only 1-in-25 or 390,000 say that they have come to British Columbia for a vacation in the past two years or so (4%).

For purposes of this report, *RVers* are the subset of travelers who have taken a camping trip recently, consider the camping experience as the *main reason* for a trip and who rely on a truck camper, travel trailer or motor home (RV) for shelter on their camping trips. There are approximately 5.1 million American RVers, or about three percent of the U.S. pleasure traveling public.

BRITISH COLUMBIA IS MORE SUCCESSFUL IN ATTRACTING RVers THAN CAMPERS.

Even though the market for American Campers (10.0 million) is about twice as large as the U.S. RV market (5.1 million), almost the same *number* of Americans in each of these groups has had recent travel experience in British Columbia. About 311,000 RVers say that they have come to British Columbia for a vacation in the past two years or so, compared to approximately 390,000 Campers.

PUBLIC CAMPGROUNDS ARE MOST POPULAR AMONG CAMPERS AND RVers.

While they may patronize different types of campgrounds on different trips, the majority of Campers (77%) and RVers (68%) stay in *public* campgrounds. A further 1-in-3 American Campers claim to have stayed in a *private* campground (33%) and about 1-in-5 have pitched a tent in a *wilderness* campsite (21%).

Use of *private* campgrounds is more prevalent among RVers than among Campers, with half of RVers saying they have recent experience in one. Close to 2-in-10 RVers have stayed in a campsite in a wilderness setting over the past two years, suggesting that even though they use a motorized form of shelter (trailers, RVs, etc.) for “most” of their camping trips, they do not necessarily *only* use this type of shelter.

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

Campers and RVers 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, with the noteworthy exception of Mountain and Pacific states.

The **Pacific** states are home to about 1-in-6 adult Americans (16%) but slightly more RVers (19%). Even more Campers (25%) live in the three states in this region (California, Oregon and Washington). 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 RVers (13%) but almost one-fifth of the U.S. Camper market (19%). By virtue of its large population, California contributes more Campers and RVers than does any other single state.

RVing seems to be particularly popular among pleasure tourists in **Mountain** states including Idaho, Utah, Colorado and Arizona. One-eighth of the RV market lives in the Mountain states (12%) whereas only 1-in-14 adult Americans do so (7%).

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

CAMPERS ARE YOUNGER AND RVers ARE OLDER.

Campers tend to be concentrated at the younger end of the age spectrum. About 1-in-6 of them are young adults (18 to 24 years), almost twice this proportion are between 25 and 34 years of age (29%). One-quarter are in their mid-thirties to mid-forties (24%) and one-fifth are in their mid-forties to mid-fifties (20%). Only 1-in-10 Campers are 55 years of age or older. In contrast **RVers**, are concentrated at the older end of the age spectrum. Close to one-third of these tourists are 55 years of age or over (31%) and fewer than 1-in-4 are between the ages of 18 and 34 years (23%). Like Campers, close to half of RVers are in the 35 to 54 year age group. Both groups are almost evenly divided between men and women.

CAMPERS HAVE MORE FORMAL EDUCATION THAN DO RVers BUT SIMILAR INCOMES.

The two camping-oriented segments differ somewhat in terms of education, and labour force participation. Specifically, more than one-third of Campers have a university degree (37%) but only about one-quarter of RVers are university educated (27%). Not surprisingly in light of the age differences between the two groups, more Campers are engaged in the labour force (73%) than are RVers (64%). In turn, compared to Campers (4%), RVers are especially likely to be retirees (17%).

Despite their differences in age and education, Campers and RVers are quite similar to one another with respect to household incomes, with both groups representing a broad range of incomes. Almost one-half of Campers and RVers report household incomes under \$60,000, over one-third are in the \$60,000 to under \$100,000 bracket and one-fifth fall within the more affluent \$100,000+ bracket.

CAMPERS AND RVers DO NOT TRAVEL WIDELY OUTSIDE THE U.S.A.

With two-in-three Campers and RVers taking recent pleasure trips *only* within the United States, these tourists might be considered *homebodies*. Only one-seventh of them have been to Canada on a recent overnight pleasure trip, suggesting that Canada is *not* a particularly attractive destination for these camping/RVing enthusiasts. Thus, like Canada in general and British Columbia specifically, most other parts of the world outside the U.S.A. attract Campers and RVers at rates no higher than is evident among *all* American pleasure tourists.

ONTARIO IS THE PRINCIPLE CANADIAN COMPETITOR FOR THESE AMERICAN TOURISTS.

Over a two-year period, this central Canadian province attracted twice as many U.S. Campers (9%) as did British Columbia (4%). Ontario and British Columbia are somewhat closer to parity among RVers, with Ontario attracting 1-in-12 (8%) and British Columbia attracting a slightly lower proportion (6%).

CAMPERS AND RVers ARE DRAWN TO SUN/SEA STATES.

Collectively, sun/sea destinations, including Florida, California, and Nevada attract about one-half of Campers and RVers for overnight pleasure trips. On a state-by-state basis, **Florida**, followed by **Nevada** (more likely for gambling than camping), **California** and **New York** are the most popular U.S. destinations for these tourists when travelling outside their home state. As such, these states represent stiff competition for British Columbia's camping and RVing businesses.

A SAFE DESTINATION IS A PRIORITY.

Most Campers and RVers 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*, offer *convenient access by car*, have *many things for adults to see and do*, pose *no health concerns*, and provide *budget lodging*.

THEY ARE LOW INVOLVEMENT TOURISTS.

There is comparatively little overlap between Campers or RVers and other sectors of interest to tourism businesses in British Columbia. Specifically, about one-quarter of Campers are also **Hikers** and/or **History/Heritage Tourists** and about one-fifth are **Anglers** but no more than 1-in-6 are members of any other trip activity sector².

Over one-quarter of RVers are also **History/Heritage Tourists** and about one-fifth are **Anglers** but the only other segments to attract more than 1-in-10 RVers are **Self-Guided Touring Travellers** and **Hikers**.

JUST BEING IN NATURE MAY BE SUFFICIENT.

The *outdoor* activity profile of Campers and RVers suggests groups of tourists seeking comparatively sedentary experiences and passive interactions with nature. They seem to want to be *in nature* rather than to *engage* nature, with some obvious exceptions such as fishing and, especially among Campers, hiking.

²Sectors 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.

Perhaps these tourists rely on the camping experience *per se* as a means of appreciating and *being in* natural settings. Some of them may also regard camping as an economical form of accommodation for trips that are motivated by other types of activities. Regardless of the explanation, *missing* as prominent trip drivers for Campers and RVers are the more vigorous outdoor activities such as climbing, backpacking, skiing, paddling or rafting.

CAMPERS AND RVers ARE NOT ESPECIALLY INTERESTED IN CULTURAL, CULINARY OR SHOPPING TRIPS.

By and large, Campers and RVers 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.

For example, about one-third of Campers and RVers have sought out a well-known historic site, visited a museum or strolled around a city to observe its buildings and architecture on recent pleasure trips but fewer than 1-in-5 have taken a trip in order to engage in these activities.

Perhaps because they tend to live in families with children, Campers are particularly apt to take a trip to go to an amusement park. Even though they are more likely to be *empty nesters* than are Campers, RVers are also drawn to amusement parks. Spectator sporting events and casinos are popular entertainment venues, especially for RVers.

Zoos, aquariums and movies also attract about one-third of Campers while farmers' markets or country fairs and fireworks displays are popular trip activities (*any*) among about one-quarter. RVers are as likely as Campers to go to a zoo, movie and/or firework display while on a recent overnight pleasure trip but are somewhat more likely to include farmers' markets or country fairs among their trip activities.

Similar to many entertainment-oriented activities, dining out at restaurants offering *local* ingredients and cuisine and visiting local outdoor cafes are much more common trip experiences (*any*) than trip drivers for Campers and RVers.

Shopping for apparel, books or music and local arts and crafts is a common trip pastime for Campers and RVers 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 Campers and two-thirds of RVers rely on the internet for travel information while over half of the members of both market segments use anecdotal information provided by **friends and relatives** and their own **past experience**. With the exceptions of those noted above, Campers and RVers use relatively few of the many travel information sources available in the marketplace. For example, only about 4-in-10 rely on **maps** and 3-in-10 seek information from **official DMO travel guides**.

BRITISH COLUMBIA IS RATED MORE FAVOURABLY THAN OTHER CANADIAN DESTINATIONS FOR OVERALL APPEAL BUT MANY U.S. CAMPERS AND RVers KNOW LITTLE ABOUT THE PROVINCE.

American Campers and RVers are most enthusiastic about Hawaii as an *appealing destination* for pleasure travel. Campers accord this tropical state a rating of 8.5 and RVers give it a rating of 8.2 on a ten-point scale. Though significantly lower than Hawaii's, moderately favourable ratings are accorded a host of destinations, including Colorado, California and Florida by both Campers and RVers. At 6.6 among Campers and 6.3 among RVers, British Columbia is rated comparably to New York State and Arizona and higher than *any* other Canadian province or territory.

Despite British Columbia's moderate success among those offering an appraisal, about one-quarter of U.S. Campers and one-third of RVers refrain from rating the province, presumably because they know too little about the destination to offer an opinion about its touristic appeal.

ATTRACTING OLDER AMERICAN RVers AND YOUNGER CAMPERS TO BRITISH COLUMBIA WILL BE CHALLENGING BECAUSE SO MANY DO NOT TRAVEL OUTSIDE THE U.S.A.

The primary difference between American overnight pleasure travellers who camp using *tents* and those who do so using a motorized vehicle such as a *camper trailer* or *motor home* is their stage in the life cycle. Perhaps many RVers are ex-Campers who, as they have aged, abandoned *roughing it* with a sleeping bag on the ground under a tent in favour of more comfortable camping, using a real mattress and a "hard" roof over their heads.

Both groups are appreciably less affluent than *typical* American visitors to British Columbia. They may elect to camp because, with their moderate incomes, camping is both an economical form of lodging and way to get a break from their day-to-day environment. For the majority, however, the vacation environment they seek is *within* the boundaries of the U.S.A. Enticing these Campers and

RVers across the Canadian border, particularly in light of impending passport requirements for land entries, will be a challenge for every Canadian destination, including those in British Columbia.

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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).³

- River Rafters
- Backcountry Lodge Guests
- Cyclists/Mountain Bikers
- History and Heritage Tourists
- Snowmobilers
- Divers & Snorkellers
- Nordic Skiers & Other Non-Alpine Winter Sport Participants⁴
- 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. Tourism British Columbia (TBC) commissioned Research Resolutions & Consulting Ltd. to prepare the American tourist profiles. This profile describes **Campers and RVers**. Additional profiles will be issued over the coming months.

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

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

B. The American Campers/RVers Report

For purposes of this report, **American Campers** and **RVers** 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.

Main Reason for Trip

*To stay at a **public campground** in a national, state, provincial or municipal park*

*To stay at a **private campground***

*To stay at a **camp site in a wilderness** setting (not a campground)*

Campers and RVers are differentiated from one another by the type of shelter they used most often on the camping trips they took over the past two years.⁵

Note to Readers

Activities and locations visited are independent of one another.

In other words, American Campers and RVers claim to have taken an overnight trip motivated by camping 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, Campers and RVers may or may not have been camping in a particular country, province or state they have visited recently for an overnight pleasure trip.

Campers

Tent/tent trailer

RVers

Truck camper/van, travel trailer/fifth wheel, or motor home/ RV

People who take a trip *in order to* go to camp are only a fraction of tourists who go camping on their vacations. In fact, over thirty-eight million Americans say they went on a camping trip over a two-year period.⁶ Of these 38.3 million American pleasure tourists, 17.3 million (45%) say they took a trip *in order to* camp.

These camping enthusiasts – those for whom staying in a public or private campground or a wilderness campsite is the main reason for a trip – are dominated by travelers who rely on tents or tent trailers when they camp (60%) rather than on camper/vans, travel trailers or RVs (31%).⁷

⁵ 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.

⁶ See Detailed Tabulations, Volume 4, page 2-5.

⁷ The remaining nine percent do not indicate which type of shelter they use most often when camping (*not stated*).

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

The report provides the following information:

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

III. Overview of U.S. Tourism Activity Sectors

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

Tourism businesses in British Columbia are competing for the attention of about 166.0 million American adults who are in the market for overnight vacations (see Table A).⁸ 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%).⁹ 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	
Overnight Trips to British Columbia		
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.

⁸ Adults are defined as individuals 18 years of age or older.

⁹ 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 sectors¹⁰ 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).¹¹

¹⁰ 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.

¹¹ 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.¹² 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 Rafters	2,406,000	1%	157,000	3%	300
Snowmobilers	1,712,000	1%	101,000	2%	200
Sea Kayakers	575,000	*	77,000	1%	333

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 1, page 1. *Less than 0.5%. ¹Sectors 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.

¹² 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. Campers and RVers Market Profile

A. Market Composition

The Camper and RVer sectors are composed of pleasure tourists who have stayed in one or more of three types of campsites as the main reason for a recent trip. Those who seek a public campground experience dominate this sector, representing 3-in-4 Campers and 2-in-3 RVers. A further 1-in-3 American Campers claim to have stayed in a private campground (33%) and about 1-in-5 have pitched their tent in a wilderness campsite (21%).

Use of *private* campgrounds is more prevalent among RVers than among Campers, with half of RVers saying they have recent experience in one. Close to 2-in-10 RVers have stayed in a campsite in a wilderness setting over the past two years, suggesting that even though they use a motorized form of shelter (trailers, RVs, etc.) for “most” of their camping trips, they do not necessarily *only* use this type of shelter.¹³

	<u>Campers</u> ¹⁴		<u>RVers</u>	
	9,973,000		5,119,000	
Public campground	7,696,000	77%	3,470,000	68%
Private campground	3,247,000	33%	2,571,000	50%
Camp site in a wilderness setting	2,120,000	21%	912,000	18%

Readers should bear in mind the prominence of *public campground* users among Campers and RVers in the analysis provided in the following pages.

¹³ Sum of percentages for various camping experiences is more than one hundred percent because of duplication.

¹⁴ See Detailed Tables, Volume 3, page 7-5.

B. Regional and Demographic Characteristics

1. Place of Residence

At almost ten million, **Campers** – American adults who take vacations *in order to* go camping using a **tent or tent/trailer** – are an important tourism market.¹⁵ They represent 1-in-17 American overnight pleasure travellers to *any destination* (6%) and about the same proportion of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so (7%).

While they are also an important market sector, **RVers** – American adults who take vacations *in order to* go camping using a **truck camper/van, travel trailer or motorhome** – are less prevalent than Campers.¹⁶ At about 5.1 million, RVers represent about 1-in-33 American overnight pleasure travellers to *any destination* (3%). RVers are, however, almost as common among the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so (6%) as are Campers.

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

Campers and RVers 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, with the noteworthy exception of Mountain and Pacific states.

- The **Pacific** states are home to about 1-in-6 adult Americans (16%) but slightly more RVers (19%) and even more Campers (25%) live in the three Pacific states: California, Oregon or Washington. California is the most populated of the Pacific states, accounting for about 1-in-8 adult Americans (12%) and for about the same proportion of RVers (13%) but represents almost one-fifth of the entire U.S. Camping market (19%). By virtue of its large population, California contributes more Campers and RVers than does any other single state.
- RVing seems to be particularly popular among pleasure tourists in **Mountain** states. One-eighth of the RV market lives in these states (12%) whereas only 1-in-14 adult Americans do (7%). The RVers in this region are spread across numerous states, with about 1-in-50 residing in each of Idaho, Utah, Colorado and Arizona Campers, while slightly over-represented in Mountain states (9%) more closely resemble this region's share of all American adults.

¹⁵ Form of "shelter" used most often on camping trips taken over the past two years.

¹⁶ Form of "shelter" used most often on camping trips taken over the past two years.

- In contrast, Campers and RVers are less likely to live in the southern, central and eastern United States than are Americans as a whole. For example, almost 2-in-10 American live in the South Atlantic region (including Florida) but only about 1-in-8 Campers and RVers live in this area. These tourists are also marginally under-represented in West South Central (9%, each) compared to the U.S. adult population as a whole (11%). Nonetheless, 1-in-20 RVers (5%) and a slightly higher proportion of Campers (7%) are **Texans**.
- Other individual states that contribute at least 1-in-20 Campers and/or RVers include **New York, Pennsylvania, and Michigan**.

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

TABLE 1: PLACE OF RESIDENCE	Campers	RVers	All U.S. Pleasure Tourists		U.S. Population
	Total	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)	(60,649)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000	222,846,000
Incidence of Campers	100%	-	7%	6%	5%
Incidence of RVers	-	100%	6%	3%	2%
New England	7%	5%	3%	5%	5%
Massachusetts	3%	2%	1%	2%	2%
Middle Atlantic	10%	10%	6%	14%	14%
New York	5%	4%	3%	6%	7%
Pennsylvania	3%	5%	1%	4%	4%
East North Central	16%	18%	9%	16%	16%
Michigan	5%	6%	2%	4%	4%
Illinois	3%	3%	3%	4%	4%
Ohio	3%	4%	2%	4%	4%
West North Central	7%	8%	5%	7%	7%
South Atlantic	12%	13%	11%	19%	19%
Florida	3%	4%	5%	6%	6%
East South Central	5%	7%	2%	6%	6%
West South Central	9%	9%	6%	11%	11%
Texas	7%	5%	5%	7%	8%
Mountain	9%	12%	7%	7%	7%
Pacific	25%	19%	50%	16%	16%
California	19%	13%	24%	13%	12%
Washington	4%	4%	20%	2%	2%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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 Campers and RVers, there are stark contrasts between them.

- **Campers** tend to be concentrated at the younger end of the age spectrum. About 1-in-6 of them are young adults (18 to 24 years), almost twice this proportion are between 25 and 34 years of age (29%). One-quarter are in their mid-thirties to mid-forties (24%) and one-fifth are in their mid-forties to mid-fifties (20%). Only 1-in-10 Campers are 55 years of age or older (see Table 2).
- **RVers**, in contrast, are concentrated at the older end of the age spectrum. Close to one-third of these tourists are 55 years of age or over (31%) and fewer than 1-in-4 are between the ages of 18 and 34 years (23%). Like Campers, close to half of RVers are in the 35 to 54 year age group.

Although almost evenly distributed by gender, men are somewhat more likely to be Campers (53%) and RVers (52%) than are women (47% and 48%, respectively).

TABLE 2: AGE & GENDER	Campers	RVers	All U.S. Pleasure Tourists	U.S. Population
			To British Columbia	Any Destination (18+ Years)
Unweighted base	Total (2,940)	Total (1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	222,846,000
Age				
18 – 24 Years	16%	6%	6%	11%
25 – 34 Years	29%	17%	15%	21%
35 – 44 Years	24%	21%	14%	17%
45 – 54 Years	20%	25%	21%	21%
55 – 64 Years	8%	16%	21%	16%
65+ Years	2%	15%	24%	17%
Gender				
Men	53%	52%	53%	49%
18 – 34 Years	23%	12%	11%	16%
35 – 54 Years	24%	25%	20%	18%
55+ Years	6%	15%	23%	15%
Women	47%	48%	47%	52%
18 – 34 Years	22%	12%	10%	16%
35 – 54 Years	20%	21%	16%	20%
55+ Years	5%	15%	21%	17%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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 Campers and RVers, like tourists who live in the U.S. as a whole, are white (see Table 3). The two camping-oriented segments differ somewhat in terms of education, and labour force participation.

- Specifically, more than one-third of Campers have a university degree (37%) but only about one-quarter of RVers are university educated (27%).
- Not surprisingly in light of the age differences between the two groups, more Campers are engaged in the labour force (73%) than are RVers (64%) while RVers are especially likely to be retirees (17%, compared to 4% of Campers).

The two segments are equally likely to live in households with at least one person occupying an executive, managerial or professional position, with about 3-in-10 Campers and RVers having this characteristic.

Despite their differences in age and education, Campers and RVers are quite similar to one another with respect to household incomes. Both groups represent a broad range of incomes. Almost one-half report household incomes under \$60,000 (47% Campers; 46% RVers), one-third are in the \$60,000 to under \$100,000 bracket (32%, each) and one-fifth fall within the more affluent \$100,000+ bracket (20% Campers; 22% RVers).

Campers closely resemble the U.S. adult population and typical American pleasure tourists as a whole in terms of race, education and household income, but are more likely to be in the labour force and are much less likely to be retired than are travellers in general. These Campers are, however, less affluent, less well educated, and less apt to be retirees than are *typical* U.S. tourists to British Columbia.

Similarly, **RVers** have a comparable race, education and labour force participation profile to the U.S. adult population as a whole and the pleasure travel market but are more apt to be retirees and to be somewhat more affluent than these larger population groups. At the same time, they, like Campers, have noticeably lower formal education and household income levels than typical U.S. tourists to British Columbia.

TABLE 3: RACE, EDUCATION, OCCUPATION, INCOME	Campers	RVers	All U.S. Pleasure Tourists		U.S. Population
	Total	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)	(60,649)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000	222,846,000
Race					
White	89%	93%	87%	86%	84%
African American	2%	2%	2%	6%	7%
Asian American	2%	1%	4%	2%	2%
Other/Not stated	7%	5%	7%	6%	7%
Education					
High school diploma or less	20%	26%	9%	20%	26%
Some post-secondary	30%	32%	23%	29%	29%
Post-secondary diploma or certificate	11%	14%	9%	10%	10%
University degree+	37%	27%	56%	39%	33%
Labour Force Participant¹	73%	64%	62%	66%	61%
Retirees	4%	17%	26%	15%	16%
Executive/Manager /Professional²	30%	28%	32%	30%	26%
Household Income³					
Under \$40,000	27%	25%	14%	27%	36%
\$40,000 - \$59,999	20%	21%	16%	19%	18%
\$60,000 - \$99,999	32%	32%	31%	30%	26%
\$100,000 - \$149,999	14%	17%	22%	16%	12%
\$100,000+	20%	22%	39%	24%	20%
\$150,000+	6%	5%	17%	8%	6%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, pages 34, 35, 36, 37.

¹ Labour force participant¹ includes working full time, part time and self-employed. ² Male or female head of household. ³ Note: 2005 household incomes have been re-percentage on total stating an income (US\$). "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

3. Life Stage

Consistent with their ages, **Campers** are parents (65%) or, much less commonly, a partner in a couple (24%) (see Table 4). They live in households of between three and four people, on average. Their concentration in the *parenting* years and their larger household sizes differentiate Campers from *all* American tourists and from those with recent travel experiences in British Columbia.

RVers' life stages differ from Campers' in a manner consistent with RVers' more advanced ages. As a market with many people who are 55 years of age or over, RVers are more apt to be living as couples (37%) and to have smaller household sizes (3.1, on average) than is the case within the more youthful Camper market. Their household size and life stage more closely resemble those of *all* American tourists than is the case for Campers. They are, however, more likely to be young or middle parents and to live in larger households than are *typical* tourists to British Columbia.

TABLE 4: HOUSEHOLD CHARACTERISTICS	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
HOUSEHOLD SIZE				
1 person	8%	7%	14%	12%
2 people	24%	35%	46%	34%
3 person	20%	21%	15%	19%
4 people	26%	21%	14%	20%
5+ people	22%	16%	9%	14%
Average (all ages)	3.4	3.1	2.6	3.0
LIFESTAGE¹				
Young singles	4%	2%	3%	3%
Middle singles	4%	4%	7%	6%
Older singles	1%	2%	4%	3%
Young couple	14%	9%	12%	11%
Working older couple	7%	15%	18%	13%
Retired older couple	3%	13%	16%	9%
Young parent	20%	16%	7%	13%
Middle parent	17%	15%	5%	11%
Older parent	28%	24%	23%	28%
Any singles	8%	7%	14%	12%
Any couples	24%	37%	46%	34%
Any parent	65%	55%	35%	51%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, pages 39, 41.

¹TNS 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 Campers and RVers indicated that they have taken recent vacations within the U.S.A. and two-thirds of each group claim to travel *only* within their own country (see Table 5). One-seventh of them have been to Canada on a recent overnight pleasure trip (15%, each), suggesting that Canada is *not* a particularly attractive destination for these camping/RVing enthusiasts. Why? Because their propensity to visit Canada over the past two years or so is not appreciably higher than the U.S. pleasure travel market as a whole (13%).

With two-in-three Campers and RVers taking recent pleasure trips *only* within the United States, these tourists might be considered *homebodies*. Thus, like Canada, most other parts of the world outside the U.S.A. attract Campers and RVers at rates no higher than is evident among *all* American pleasure tourists.

Mexico is the single exception among RVers. These tourists are slightly more likely than Americans in general to have taken a recent pleasure trip south of the U.S. border (15% for RVers; 11% for all pleasure travellers), putting Mexico on par with Canada among RVers.

In light of their penchant for travelling only within the U.S.A., Campers and RVers are much less likely than typical U.S. visitors to British Columbia to travel to Canada . . . and every other part of the globe.

Note to Readers

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

In other words, American Campers and RVers claim to have taken an overnight trip motivated by camping 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, Campers and RVers may or may not have been camping in a particular country, province or state they have visited recently for an overnight pleasure trip.

**TABLE 5: COMPETITIVE DESTINATIONS
WORLDWIDE***

	Campers	RVers	All U.S. Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
Canada	15%	15%	100%	13%
U.S.A.	99%	99%	100%	98%
Other Countries (NET)	24%	23%	52%	26%
Mexico	13%	15%	27%	11%
Caribbean	7%	9%	24%	11%
Europe	7%	5%	21%	7%
South/Central America	3%	2%	9%	3%
Asia	3%	1%	7%	2%
Africa	1%	**	2%	1%
Australia/New Zealand	1%	1%	3%	1%
Destination patterns				
Only U.S.A.	66%	68%	-	67%
U.S.A. & Canada only	10%	8%	48%	7%
U.S.A. & Mexico only	6%	7%	-	5%
U.S.A. & Canada & Other Countries	6%	7%	51%	5%
U.S.A. & Other Countries only (not Canada or Mexico)	8%	6%	-	11%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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%.

B. Canadian Destinations

Approximately one-tenth of Campers and one-eighth of RVers have had some travel experience in British Columbia over a ten-year period (10% and 12%, respectively). Only 1-in-25 Campers are *recent* pleasure tourists in the province (4%) and slightly more RVers claim to have taken a recent pleasure trip to British Columbia (6%) (see Table 6). As noted earlier, however, these recent British Columbia tourists may or may not have pitched their tent or hooked up their RV 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 twice as many Campers (9%) as did British Columbia (4%). Ontario and British Columbia are somewhat closer to parity among RVers, with Ontario attracting 1-in-12 (8%) and British Columbia attracting a slightly lower proportion (6%).

TABLE 6: COMPETITIVE CANADIAN DESTINATIONS*

	Campers	RVers	All U.S. Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
British Columbia				
Any purpose, past 10 years	10%	12%	100%	9%
Any purpose, past 2 years	5%	7%	100%	4%
Pleasure, past 2 years	4%	6%	100%	3%
Overnight Pleasure Trips in Past 2 Years to . . .				
Atlantic Canada	1%	2%	8%	2%
Quebec	3%	3%	9%	3%
Ontario	9%	8%	17%	7%
Man/Sask	1%	2%	7%	1%
Alberta	1%	2%	15%	1%
Yukon	**	1%	9%	**

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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 Campers and RVers (see Table 7). Information on visitation by these travellers to *all* states, including their “home state” can be found in the detailed tabulations.¹⁷

Campers and RVers are drawn from their home state to **sun/sea** destinations within the U.S., whether to go camping or to engage in other tourism experiences. Collectively, these destinations, including Florida, California, and Nevada attract about one-half of Campers and RVers for overnight pleasure trips. On a state-by-state basis, **Florida**, followed by **Nevada** (more likely for gambling than camping), **California** and **New York** are the most popular U.S. destinations for these tourists when travelling outside their home state. As such, these states represent stiff competition for British Columbia’s camping and RVing businesses.

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

<u>Destinations</u>	<u>Excluding State Residents</u>		<u>Including State Residents</u> ¹⁸	
	Campers	RVers	Campers	RVers
Florida	21%	24%	20%	26%
California	13%	14%	30%	25%
Nevada	17%	19%	19%	22%
New York State	12%	10%	16%	13%

When residents are included, California captures almost one-third of the entire American Camper market and one-quarter of the RV market (on trips that may or may not have included staying in a campground). British Columbia will, needless to say, be competing with California as a camping destination for California residents and for the Campers and RVers who live in other U.S. states.

¹⁷ See Volumes 1 – 4, Table 47.

¹⁸ See above.

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

	Campers	RVers	All U.S. Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
Sun/Sea States (S)	54%	56%	75%	54%
<i>In rank order by Campers</i>				
Florida (S)	21%	24%	25%	23%
Nevada (S)	17%	19%	28%	14%
California (S)	13%	14%	32%	13%
New York State	12%	10%	19%	11%
Arizona (S)	11%	14%	23%	9%
Tennessee	10%	13%	9%	9%
Colorado	10%	10%	18%	7%
Illinois	10%	9%	14%	8%
Pennsylvania	9%	11%	12%	9%
Texas (S)	8%	11%	13%	7%
Ohio	7%	10%	8%	7%
Georgia	6%	10%	9%	8%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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 Campers or RVers. "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. Campers and RVers the first consideration in planning their most recent summer and/or winter trip was **destination** (62%, each) (see Table 8). At the same time, about one-quarter of these tourists start their trip planning process with a focus on the **type of vacation experience** they wish to have (25% Campers; 23% RVers) and about one-fifth begin with the **activities** they want to enjoy while on their trip (23% Campers; 19% RVers).

These levels of experience-driven and activity-driven planning are higher than is the case among typical U.S. tourists to British Columbia (19% and 16% respectively) or in the American travel market as a whole (20% and 13% respectively). While Campers and RVers also put a premium on destination choice *per se*, with over 6-in-10 claiming that it is *extremely* or *very important* to them, destination is less important to them than it is to Americans with recent pleasure travel experience in British Columbia (73%).

TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION

	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
First Consideration for Most Recent Summer/Winter Trip (NET)*				
Start with destination	62%	62%	72%	62%
Start with activities	23%	19%	16%	13%
Start with type of vacation experience	25%	23%	19%	20%
Look for package deal	2%	2%	3%	2%
Importance of Destination				
Extremely/Very Important	64%	63%	73%	67%
Extremely important	26%	26%	31%	29%
Very important	38%	37%	42%	39%
Average**	3.8	3.8	4.0	3.9

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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.¹⁹

Campers, and to an even greater extent, RVers resemble American overnight pleasure travellers as a whole in terms of the conditions they accord *high importance* when selecting a destination. Like other American tourists, both Campers and RVers put *feeling safe* at the top of their list (68% Campers; 72% RVers) (see Table 9). Approximately 6-in-10 of them also want a destination with *convenient access by car* (57% Campers; 61% RVers), about half want *many things for adults to see and do* (53% Campers; 49% RVers) and about 4-in-10 also place high importance on a destination that poses *no health concerns* (39% Campers; 43% RVers).

While the conditions they impose on destination choices are very similar, there are some noteworthy differences between Campers and RVers:

- Campers are more apt to take into account the availability of *budget lodging* (36% Campers; 29% RVers) and *availability of information in the internet* than are RVers (33% Campers; 24% RVers). The greater importance accorded the internet as a tool among Campers may be a function of their age. As younger tourists, Campers can be expected to be more familiar with and reliant on the internet than their older RV colleagues.
- In turn, RVers are more concerned about the availability of camping facilities (40%) than are Campers (27%) and being *familiar with the culture and language* of the location they are visiting when making a destination choice (20% Campers; 27% RVers). This interest in *familiarity* may contribute to the relative reluctance of RVers to travel outside the U.S.A.

¹⁹ “Highly important”, “Somewhat important”, and “Of no importance”.

Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 Campers/ RVers²⁰

	Campers	RVers	U.S. Pleasure Tourists	
			To British Columbia	Total
Feeling safe	68%	72%	67%	73%
Convenient access by car	57%	61%	35%	51%
Lots for adults to see/do	53%	49%	50%	48%
No health concerns	39%	43%	40%	43%
Budget accommodation	36%	29%	22%	29%
Low cost packages available	35%	31%	21%	32%
Information available on internet	33%	24%	28%	28%
Camping facilities	27%	40%	9%	8%

Availability of *low cost travel packages* is a salient factor in a destination choice for about 3-in-10 Campers and RVers. One-quarter of these tourists put a priority on *mid-range lodging*, and one-fifth would prefer *direct air access* when selecting a destination.

²⁰ See Table 9 for full array of considerations deemed “highly important” and “of no importance”.

TABLE 9: CONDITIONS FOR SELECTING A DESTINATION

	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
Bold rows are proportion stating "Highly Important".				
<i>In rank order by Campers</i>				
Feeling safe	68%	72%	67%	73%
Of no importance	4%	2%	2%	2%
Convenient access by car	57%	61%	35%	51%
Of no importance	4%	4%	12%	7%
Lots for adults to see/do	53%	49%	50%	48%
Of no importance	4%	5%	4%	5%
No health concerns	39%	43%	40%	43%
Of no importance	16%	16%	14%	14%
Budget accommodation	36%	29%	22%	29%
Of no importance	13%	18%	27%	21%
Low cost packages available	35%	31%	21%	32%
Of no importance	16%	22%	26%	18%
Information available on internet	33%	24%	28%	28%
Of no importance	21%	30%	23%	24%
Mid-range accommodation	29%	25%	37%	33%
Of no importance	18%	18%	9%	13%
Lots for children to see/do	28%	25%	10%	20%
Of no importance	45%	50%	71%	55%
Camping	27%	40%	9%	8%
Of no importance	21%	18%	63%	65%
Familiar with culture & language	20%	27%	12%	23%
Of no importance	19%	17%	24%	17%
Direct access by air	19%	18%	34%	26%
Of no importance	32%	39%	14%	25%
Great shopping	12%	13%	11%	16%
Of no importance	45%	41%	44%	36%
Have friends or relatives there	10%	12%	7%	14%
Of no importance	58%	55%	64%	55%
Very different culture than own	8%	6%	11%	8%
Of no importance	47%	54%	34%	48%
Disabled-person-friendly	7%	12%	8%	9%
Of no importance	76%	68%	77%	71%
Convenient access by train/bus	7%	7%	9%	8%
Of no importance	55%	60%	45%	54%
Luxury accommodation	6%	7%	9%	9%
Of no importance	63%	61%	48%	54%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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 Campers and RVers are most enthusiastic about Hawaii as an *appealing destination* for pleasure travel. Campers accord this tropical state a rating of 8.5 and RVers give it a rating of 8.2 on a ten-point scale (see Table 10).²¹ Though significantly lower than Hawaii's, moderately favourable ratings are accorded a host of destinations, including Colorado (7.4 Campers; 7.3 RVers), California (7.3 Campers; 7.0 RVers) and Florida (7.2 Campers; 7.3 RVers).

At 6.6 among Campers and 6.3 among RVers, British Columbia is rated comparably to New York State and Arizona and higher than *any* other Canadian province or territory. Despite British Columbia's moderate success among those offering an appraisal, it is important to note that about one-quarter of U.S. Campers and one-third of RVers refrain from rating the province, presumably because they know too little about the destination to offer an opinion about its touristic appeal.

Summary: Highest Appeal Destinations among Campers/RVers²²

	U.S. Pleasure Tourists			
	Campers	RVers	To British Columbia	Total
Hawaii	8.5	8.2	8.5	8.4
Colorado	7.4	7.3	7.5	7.1
California	7.3	7.0	7.8	7.3
Florida	7.2	7.3	6.8	7.3
New York State	6.7	6.1	7.0	6.6
British Columbia	6.6	6.3	8.7	6.2
Arizona	6.6	6.8	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 Campers (6.6), RVers (6.3), or all U.S. pleasure travellers (6.2), most of whom have no direct experience with British Columbia.

Among Campers and RVers **who have been to British Columbia in the past two years or so**, the province achieves a rating of 8.8, surpassing Hawaii.²³ The challenge, of course, is getting these camping enthusiasts to the province!

²¹ 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.

²² See Table 10 for full array of average ratings and proportion unable/unwilling to rate each destination.

²³ See detailed tables, Volume 3, page 26-10 for figures. Note: the ratings include *both* Campers and RVers (NET).

TABLE 10: APPEAL OF VARIOUS DESTINATIONS

	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
<i>Bold rows are average ratings*</i>				
British Columbia	6.6	6.3	8.7	6.2
No rating provided	27%	34%	2%	31%
Newfoundland & Labrador	5.1	5.0	6.0	4.8
No rating provided	41%	43%	29%	42%
Nova Scotia	5.7	5.7	6.7	5.5
No rating provided	33%	37%	24%	35%
New Brunswick	5.1	5.0	6.1	4.9
No rating provided	43%	42%	31%	43%
Prince Edward Island	6.0	5.8	6.9	5.6
No rating provided	35%	39%	25%	38%
Quebec	6.0	5.5	6.8	5.8
No rating provided	26%	32%	18%	28%
Ontario	6.3	6.1	6.8	6.1
No rating provided	21%	28%	19%	25%
Manitoba	5.0	5.1	5.6	4.7
No rating provided	41%	44%	31%	43%
Saskatchewan	5.0	5.2	5.6	4.8
No rating provided	40%	41%	29%	42%
Alberta	5.7	5.7	6.8	5.2
No rating provided	35%	39%	22%	38%
Yukon	5.7	5.7	6.3	5.1
No rating provided	33%	37%	24%	37%
Northwest Territories	5.7	5.9	6.1	5.1
No rating provided	32%	37%	26%	36%
New York State	6.7	6.1	7.0	6.6
No rating provided	7%	13%	8%	10%
Colorado	7.4	7.3	7.5	7.1
No rating provided	7%	11%	8%	11%
Florida	7.2	7.3	6.8	7.3
No rating provided	4%	7%	6%	6%
California	7.3	7.0	7.8	7.3
No rating provided	5%	7%	3%	7%
Hawaii	8.5	8.2	8.5	8.4
No rating provided	5%	10%	5%	8%
Arizona	6.6	6.8	7.0	6.6
No rating provided	6%	10%	6%	10%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 26. **Bold rows are average ratings calculated using a ten-point bi-polar rating scale ranging from very appealing (10) to very unappealing (1). Averages are calculated on those volunteering a rating only. "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 Campers' and RVers' lists for having *many good reasons* to visit on a pleasure trip (see Table 11).²⁴ Specifically, Hawaii tops the list with almost 3-in-4 Campers and 2-in-3 RVers stating that there are many good reasons to go to this tropical destination. British Columbia is well down on the list, with only one-quarter of Campers (26%) and even fewer RVers (22%) 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 Campers and RVers.

Summary: Destinations With At Least One-Half Saying *Many Good Reasons* to Visit (in rank order within each category)²⁵

<u>Campers</u>		<u>RVers</u>		U.S. Pleasure Tourists			
				<u>To British Columbia</u>		<u>Total</u>	
Hawaii	72%	Hawaii	66%	B.C.	73%	Hawaii	67%
California	57%	Florida	54%	Hawaii	72%	Florida	54%
Florida	54%	California	50%	California	63%	California	53%
				Less than One-Half			
Colorado	49%	Colorado	48%			Colorado	41%
New York	45%	Arizona	37%			New York State	40%
Arizona	32%	New York	36%			Arizona	31%
B.C.	26%	B.C.	22%			B.C.	21%

Among Campers and RVers who have recently travelled to British Columbia, however, over 8-in-10 say that there are many good reasons to go (83%).²⁶ As with the *appeal* rating discussed in the previous chapter, the province has a much more favourable image among those who have experienced what it can offer.

²⁴ 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*.

²⁵ 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.

²⁶ See Detailed Tables, Volume 3, page 27-4. Includes Campers and RVers (NET).

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

	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
<i>% stating "MANY" good reasons to visit</i>				
British Columbia	26%	22%	73%	21%
<i>Rank order among Campers</i>				
Hawaii	72%	66%	72%	67%
California	57%	50%	63%	53%
Florida	54%	54%	45%	54%
Colorado	49%	48%	46%	41%
New York State	45%	36%	47%	40%
Arizona	32%	37%	35%	31%
Ontario	22%	19%	28%	20%
Quebec	19%	15%	33%	18%
Prince Edward Island	15%	17%	25%	13%
Northwest Territories	14%	17%	20%	11%
Yukon	14%	19%	23%	11%
Nova Scotia	14%	15%	25%	13%
Alberta	13%	14%	27%	10%
Newfoundland & Labrador	10%	10%	16%	8%
Saskatchewan	8%	9%	10%	6%
New Brunswick	7%	9%	16%	7%
Manitoba	6%	7%	9%	5%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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*.²⁷

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 campground in a tent or RV** in the past two years, these activities are not linked to any specific destination these tourists claim to have visited over the same time period. Thus, a trip prompted by camping in the backcountry or staying in a public campground with RV facilities 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* Campers and RVers 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 Campers and RVers 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.

²⁷ Presumably, “these trips” are those on which the specific activity took place.

B. Trip Activities & Drivers

1. Campers' and RVers' Cross-Over with Other Trip Activity Sectors

As demonstrated by their comparatively low levels of representation in other activity-based tourism sectors, Campers and, to an even greater extent, RVers can be described as *low-involvement* travellers.²⁸

Campers

About one-quarter of Campers are also **Hikers** and/or **History/Heritage Tourists** and about one-fifth are **Anglers** but no more than 1-in-6 are members of any other trip activity sector covered in this report (see Table 12).

Despite the low levels of intersection between Campers and many other activity sectors of interest, these tenting enthusiasts are *more* apt to take trips in order to engage in other activities than are American pleasure travellers in general (see Index, based on the share of Campers in each other activity sector relative to the American pleasure market in total).

- Compared to the U.S. travelling public as a whole, Campers are between **four** and **five times** as likely to be Hikers or River Rafters.
- They are also at least **three times** as likely to be Backcountry Lodge Guests, to take trips to do cycling/mountain biking, go sea kayaking, Nordic skiing or snowmobiling.

RVers

Over one-quarter of RVers are also **History/Heritage Tourists** and about one-fifth are **Anglers** but the only other segments to attract more than 1-in-10 RVers are **Self-Guided Touring Travellers** and **Hikers** (see Table 12).

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

- They are **four times** as likely as American pleasure travellers to be River Rafters and/or Snowmobilers; and
- More than **three times** as likely to be Backcountry Lodge Guests and/or Sea Kayakers.

²⁸ 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 Campers and RVers 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**

	Campers	RVers	All U.S. Pleasure Tourists			
			To British Columbia	Any Destination	Index to All U.S. Tourists	
	Total (2,940)	Total (1,501)	(1,706)	(45,697)	Campers	RVers
Unweighted base						
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000		
<i>Rank order among Campers</i>						
Campers	100%	N/A	7%	6%	1,667	N/A
RVers	N/A	100%	6%	3%	N/A	3,333
Hikers	26%	14%	11%	6%	433	233
History and Heritage Tourists	24%	27%	22%	14%	171	193
Anglers	19%	22%	11%	8%	238	275
Self-Guided Overnight Touring Travellers	16%	15%	26%	11%	145	136
Alpine Skiers	15%	9%	13%	6%	250	150
Backcountry Lodge Guests	7%	7%	4%	2%	350	350
Divers & Snorkellers	7%	6%	7%	3%	233	200
Aboriginal Activity Tourists	6%	8%	9%	3%	200	267
Cyclists/Mountain Bikers	6%	5%	6%	2%	300	250
River Rafter	5%	4%	3%	1%	500	400
Golfers	5%	5%	7%	4%	125	125
Nordic Skiers	3%	2%	5%	1%	300	200
Snowmobilers	3%	4%	2%	1%	300	400
Sea Kayakers	1%	1%	1%	*	333	333

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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, Campers and RVers take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.²⁹

- In addition to taking trips in order to go to camping using a tent or recreational vehicle, over half of these Americans take trips in order to engage in at least one **water-based outdoor activity**.³⁰
- Two-fifths have taken recent overnight pleasure trips in order to engage in **entertainment** activities such as theme parks, casinos and movies and about the same proportion of Campers and RVers have taken trips motivated by **cultural** interests such as going to well-known historic sites, museums, or cultural performances.
- Staying in a seaside or lakeside **resort** or spa as a reason for taking a trip is characteristic of 3-in-10 Campers and RVers and about one-quarter take trips to have **dining and wine-related** experiences or to go to **spectator sporting events** such as professional baseball or football games.
- **Fairs and Festivals** are more apt to be trip motivators for RVers (35%) than they are for Campers (27%). Conversely, the *younger* Campers are more likely to take trips in order to engage in an **outdoor winter activity** including alpine skiing (21%) than are older RVers (15%).

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, more Campers and RVers *participated* in at least one water-based outdoor activity while on a recent overnight pleasure trip (80% Campers; 75% RVers) than claim to have taken a trip motivated by one of these activities (56% Campers; 54% RVers).

Food and wine experiences are especially likely to be “one-of-many” trip activities (75% Campers; 74% RVers) but the driving force behind a trip for relatively few segment members (24% Campers; 29% RVers). Similarly, about two-thirds of Campers

²⁹ 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 Campers and RVers 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.

³⁰ All Campers and RVers are included in the **land-based outdoor activity segment** because “camping” is one of the activities used to define members of this group. Other key activities included in the *land-based* segment include hiking, bird watching and viewing land-based animals.

and RVers went to a museum, gallery or cultural performance on a recent trip but less than two-fifths of them took the trip in order to do so.

Compared to *all* U.S. overnight pleasure travellers, Campers and RVers are, for the most part, almost twice as likely to identify activities in each of the major activity groups as ones that *motivated* recent trips (main reason).

<u>Major Activity Group</u>	<u>Main Reason</u>			<u>Any Participation</u>		
	Campers	RVers	All U.S. Pleasure Tourists	Campers	RVers	All U.S. Pleasure Tourists
Outdoor Water-Based	56%	54%	30%	80%	75%	56%
Theme/Amusement Parks	39%	42%	22%	58%	55%	43%
Cultural/Learning & Events	37%	39%	23%	66%	62%	61%
Outdoor Winter Activities	21%	15%	8%	27%	19%	12%

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

TABLE 13: MAJOR ACTIVITY GROUPS – MAIN & ANY		Campers		RVers	
		Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base		(2,940)	(2,940)	(1,501)	(1,501)
Weighted, Projected		9,973,000	9,973,000	5,119,000	5,119,000
Outdoor Land Based Activities		100%	100%	100%	100%
Outdoor Water Based Activities		56%	80%	54%	75%
Cultural/Learning Activities & Events		37%	66%	39%	62%
Resorts		29%	40%	30%	41%
Theme/Amusement Parks/Movies (Entertainment)		39%	58%	42%	55%
Food & Wine		24%	75%	29%	74%
Fairs/Festivals		27%	53%	35%	57%
Spectator Sports		24%	34%	27%	35%
Outdoor Winter Activities		21%	27%	15%	19%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 3, pages 2/11.

3. Individual Trip Activities: The Outdoors

When taken as a whole, the *outdoor* activity profile of Campers and RVers suggests groups of tourists seeking comparatively sedentary experiences and passive interactions with nature (see Table 14).³¹ They seem to want to be *in nature* rather than to *engage* nature, with some obvious exceptions such as hiking, especially among Campers, and fishing. Perhaps these tourists rely on the camping experience *per se* as a means of appreciating and *being in* natural settings in ways that require relatively little effort on their part. Some of them may also regard camping as an economical form of accommodation for trips that are motivated by other types of activities. Regardless of the explanation, *missing* as prominent trip drivers for Campers and RVers are the more vigorous outdoor activities such as climbing, backpacking, skiing, paddling or rafting.

- Instead, 3-in-10 take trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them.
- Fishing, especially in fresh water, is a motivation for a recent overnight pleasure trips for about 2-in-10 Campers (19%) and RVers (23%).
- Similar proportions take trips in order to spend time on a beach (20% Campers; 17% RVers) and slightly fewer are motivated by an interest in seeing well-known natural wonders (17% Campers; 16% RVers).
- As noted previously, **Campers** are more apt to take overnight pleasure trips motivated by hiking (26%) than are RVers (14%).

Compared to the typical U.S. overnight pleasure traveller, a Camper or RVer is more likely to identify *passive* and *active* outdoor activities including fishing, hiking, swimming or sunbathing on a beach as ones that *motivated* recent trips (main reason) and as activities that were engaged in on these trips (any participation). Their higher level of engagement with the outdoors on trips vis à vis the typical American tourist suggests that these camping enthusiasts represent distinctive markets.

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

³¹ 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 Campers and RVers 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 14: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN & ANY*	Campers		RVers	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(2,940)	(2,940)	(1,501)	(1,501)
Weighted, Projected	9,973,000	9,973,000	5,119,000	5,119,000
Camping	100%	100%	100%	100%
Public campground	77%	82%	68%	72%
Private campground	33%	39%	50%	59%
Camp site in wilderness setting	21%	25%	18%	21%
Nature park	30%	47%	29%	44%
Fishing	19%	37%	23%	42%
Fresh water	16%	32%	20%	38%
Well known natural wonders	17%	31%	16%	29%
Flora/fauna viewing	11%	30%	12%	30%
Wildlife viewing – land based animals	7%	22%	9%	22%
Whale watching	4%	12%	5%	11%
Wildflowers/flora	4%	14%	4%	12%
Bird watching	3%	12%	5%	14%
Hiking	26%	47%	14%	30%
Same day excursion on overnight trip	15%	40%	9%	26%
Sunbathing or sitting on a beach	20%	40%	17%	35%
Swimming in oceans	14%	37%	14%	31%
Swimming in lakes	13%	40%	12%	36%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 3, pages 2/11. *Activities shown here are those that are named by at least about 1-in-3 Campers or RVers 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, Campers and RVers 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.³² Entertainment-oriented activities in general, and particularly theme parks are, however, trip motivators for Campers and RVers (see Table 15). Casinos and, as noted previously, spectator sporting events are also common trip drivers, attracting about 1-in-4 of these tourists.

Culture

Campers and RVers are more inclined to engage in a variety of cultural and heritage activities as "one-of-many" trip activities than they are to be motivated to take overnight pleasure trips in order to engage in these activities. For example, about one-third have sought out a well-known historic site, visited a museum or strolled around a city to observe its buildings and architecture on recent pleasure trips but fewer than 1-in-5 have taken a trip in order to engage in these activities. Similar patterns are evident for seeing other historic sites, attending arts performances such as classical music concerts, opera or ballet and going to general history museums. These tourists are two to three times as likely to engage in these activities *as one of their trip activities* as they are to consider them as the driving force behind the trip.

Entertainment

Perhaps because they tend to live in families with children, Campers are particularly apt to take a trip to go to an amusement park (Main, 39%; Any, 48%). Even though they are more likely to be *empty nesters* than are Campers, RVers are also drawn to amusement parks (Main, 33%; Any, 43%). Casinos are popular entertainment venues, especially for RVers (Main, 28%; Any, 46%).

Zoos, aquariums and movies also attract about one-third of Campers while farmers' markets or country fairs and fireworks displays are popular trip activities (*any*) among about one-quarter. RVers are as likely as Campers to go to a zoo, movie and/or firework display while on a recent overnight pleasure trip but are somewhat more likely to include farmers' markets or country fairs among their trip activities. All of these entertainment-oriented experiences are much more commonly identified as *one among many* trip activities than as a main reason for taking a trip among both Campers and RVers.

Food

³² 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 Campers and RVers 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.

Similar to many entertainment-oriented activities, dining out at restaurants offering *local* ingredients and cuisine (Campers: Main, 14%; Any, 59%; RVers: Main, 18%; Any, 56%) and visiting local outdoor cafes (Campers: Main, 4%; Any, 33%; RVers: Main, 5%; Any, 30%) are much more common trip experiences (any) than trip drivers for Campers and RVers.

Shopping

Shopping for apparel, books or music and local arts and crafts is a common trip pastime for Campers and RVers 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, Campers and RVers are more likely to engage in outdoor activities or take trips for these activities. While not to the same extent, these camping 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). For many of these activities, however, American Campers and RVers closely resemble the travelling public at large with respect to *any* participation while on a trip. Examples of *parity* with all American travellers include going to a restaurant that features local cuisine, strolling in cities to see the architecture, seeing well-known historic sites and shopping for apparel.

	<u>Main Reason</u>			<u>Any Participation</u>		
	All U.S. Pleasure			All U.S. Pleasure		
<u>Other Activities</u>	Campers	RVers	Tourists	Campers	RVers	Tourists
Amusement parks	39%	33%	18%	48%	43%	34%
Casinos	19%	28%	14%	36%	46%	36%
Restaurants - local ingredients/recipes	14%	18%	6%	59%	56%	58%
Strolling in a city to see architecture	10%	12%	7%	37%	32%	34%
Well known historic sites	12%	14%	8%	34%	33%	30%
Shopping - Clothing, shoes, jewellery	9%	12%	5%	49%	49%	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*	Campers		RVers	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(2,940)	(2,940)	(1,501)	(1,501)
Weighted, Projected	9,973,000	9,973,000	5,119,000	5,119,000
<i>In rank order by main reason within each subgroup (Campers)</i>				
Cultural & Heritage	37%	66%	39%	62%
Museum – Any	13%	37%	16%	34%
Historic sites - well known	12%	34%	14%	33%
Strolling around a city to see architecture	10%	37%	12%	32%
Historic sites -other	10%	29%	13%	29%
General History Museum	7%	22%	8%	22%
Entertainment	63%	88%	70%	89%
Amusement park	39%	48%	33%	43%
Casino	19%	36%	28%	46%
Zoos	13%	31%	15%	29%
Aquariums	12%	31%	12%	27%
Firework displays	9%	25%	13%	27%
Farmers' markets or country fairs	8%	26%	14%	33%
Movies/cinema	8%	36%	10%	30%
Food & Wine	24%	75%	29%	74%
Dining – restaurants offering local ingredients and recipes	14%	59%	18%	56%
Local outdoor cafes	4%	33%	5%	30%
Shopping	14%	70%	20%	67%
Clothing, shoes, jewellery	9%	49%	12%	49%
Bookstores or music stores	7%	41%	9%	33%
Antiques	6%	27%	8%	30%
Local arts & crafts studios	6%	37%	8%	35%
Spectator Sports (Any)	24%	34%	27%	35%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 3, pages 2/11. *Activities shown here are those that are named by at least about 1-in-3 Campers or RVers 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 Campers and RVers are not recent overnight cruise passengers or organized overnight tour participants (see Table 16). Of the 1-in-8 Campers and about 1-in-6 RVers 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.

Of the minority who participate in *any* overnight group tour, about equal proportions of Campers and RVers claim to have taken an **organized** overnight group tour (13% Campers; 17% RVers) as to have taken **self-directed** touring trips over a two-year period (16% Campers; 15% RVers). 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 is more characteristic of Campers (35%) and RVers (38%) than is taking any type of overnight tour (24% Campers; 26% RVers). Unlike overnight tours, however, Campers and RVers are somewhat more inclined to take self-directed day tours than they are to take organized ones.

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 Campers and RVers who take *self-directed* day touring excursions.³³

³³ See Detailed Tabulations, Volumes 3, 4 page 13-2 for figures.

TABLE 16: CRUISES/GROUP TOURS	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
Took any overnight cruise in past 2 years	13%	18%	49%	17%
Type of Cruise/Destination				
Ocean - Caribbean	6%	9%	19%	9%
Ocean - Other	4%	6%	15%	5%
Ocean - Alaska	2%	4%	29%	3%
Great Lakes	*	1%	1%	*
Overnight Touring (NET)	24%	26%	48%	20%
Organized Tour	13%	17%	32%	12%
Multiple Location	8%	10%	26%	8%
Single Location	9%	12%	16%	7%
Self-Directed Touring	16%	15%	26%	11%
Same-Day Touring on Overnight Trip (NET)	35%	38%	57%	30%
Self-Directed Touring	25%	28%	38%	20%
Organized Excursion	19%	21%	43%	19%
Type of Organized Day Tour				
<i>Among Organized Day Tour Takers</i>	(100%)	(100%)	(100%)	(100%)
City	51%	49%	69%	54%
Countryside	45%	54%	60%	42%
Wilderness/outdoor	41%	38%	45%	26%
Sightseeing cruise (day excursion)	35%	39%	50%	34%
Wineries	17%	15%	21%	13%
Casino	17%	30%	18%	14%
Factory	8%	13%	14%	7%
Airplane/helicopter (pilot or passenger)	7%	11%	16%	6%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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 Campers and RVers 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 camper or RVer or is shared with other household members.

TABLE 17: TRAVEL PLANNING	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
Frequency of personal involvement in trip planning, past 2 years				
All	63%	70%	69%	65%
Most	21%	15%	18%	15%
Some	10%	8%	10%	10%
None/not stated	6%	6%	4%	10%
Main responsibility for trip planning				
Respondent	41%	34%	41%	39%
Shared with other household member	30%	32%	26%	25%
Spouse/partner	15%	20%	20%	17%
Other/not stated/not involved in travel planning	12%	12%	13%	19%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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 available to them, relatively few travel information sources enjoy widespread use among Campers and RVers apart from the internet and personal connections. The **internet** tops the chart for Campers (78%) and, to a lesser extent, RVers (68%) (see Table 18). Three-fifths of these tourists rely on their own **past experience** and one-half use anecdotal information provided by **friends and relatives**. About two-fifths include **maps** and three-in-ten include **official DMO travel guides** among their sources of travel information. In the main, these are the same sources of information that may be influencing American pleasure travellers who have recently done so to take trips to British Columbia.

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

(in rank order in each column)

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

With most Campers and RVers relying on the internet for travel planning and over two-fifths saying that they *normally* visit **travel websites**, the internet has the greatest reach for camping-oriented tourism businesses in British Columbia. RVers are more apt to read the travel section in weekday editions of their local newspaper (20%) and to normally watch **televised travel shows** (37%) than are Campers (11%, 29% respectively). General **travel magazines** such as *Condé Nast* are less popular than are **outdoor activities/sports magazines** such as *Backpacker* or *Outdoor Life* among Campers (21%) and RVers (20%).

Compared to recent American tourists to British Columbia, Campers and RVers are somewhat more likely to read affinity group magazines such as *Outdoor Life* but less inclined to read generic *travel* magazines. Frequent readership of travel sections in a local newspaper's weekend or weekday editions is less common among Campers than it is among U.S. overnight pleasure travellers as a whole and those who have recently

travelled to British Columbia. RVers, on the other hand, tend to read these travel sections frequently at about the same rate as do all American overnight tourists.³⁴

TABLE 18: INFORMATION SOURCES FOR TRAVEL PLANNING & GENERAL MEDIA HABITS

	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
<i>In rank order by Campers</i>				
<u>SOURCES OF TRAVEL PLANNING INFO</u>				
Internet website	78%	68%	82%	68%
Past experience	62%	62%	60%	49%
Advice of friends/relatives	52%	50%	54%	41%
Maps	40%	37%	49%	29%
Official DMO travel guides	29%	30%	42%	18%
Visitor information centres	28%	25%	28%	18%
Any newspaper	25%	26%	40%	20%
Articles	21%	22%	36%	16%
Advertisements	11%	14%	20%	10%
Auto club	23%	23%	40%	22%
Travel information in mail	17%	20%	30%	14%
Travel agent	14%	16%	38%	17%
Travel guide books	14%	9%	30%	11%
Any television	12%	11%	19%	8%
Programs	9%	10%	17%	6%
Advertisements	6%	6%	6%	4%
Electronic newsletters via e-mail	8%	5%	12%	5%
Trade, travel, sportsmen's shows	3%	7%	7%	2%
<u>TRAVEL MEDIA</u>				
Frequently read newspaper Travel Section				
In weekday editions	11%	20%	34%	16%
In weekend editions	16%	20%	36%	20%
Magazines read in typical month				
Travel	11%	15%	28%	11%
Outdoor activities/sports	21%	20%	16%	11%
Normally watch Travel Shows on TV				
	29%	37%	48%	29%
Normally visit Travel websites				
	45%	41%	57%	39%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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.

³⁴ 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 Campers, RVers and tourists who have taken a recent pleasure trip to British Columbia rely on the internet for travel planning. Travel sites such as *Expedia* or *Travelocity*, followed by hotel/resort sites are the most commonly used websites among these American tourists who rely on the internet for travel planning (see Table 19). Other sites used by about 2-in-5 internet users include destination marketing organization sites, airline and/or attractions sites.

Not surprisingly, **booking** on-line is less common than is searching for information on the internet. Nonetheless, over half of American Campers (55%) and two-fifths of RVers (43%) claim to have made a travel-related booking on line over the past two years or so. As their website preferences would suggest, the most common on-line bookings 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 Campers than among U.S. overnight pleasure travellers as a whole. RVers, who tend to be older than Campers, use the internet for travel planning and booking at about the same rate as do typical U.S. overnight pleasure tourists.

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING

	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
Used Internet website for travel planning, past 2 years	78%	68%	82%	68%
	(100%)	(100%)	(100%)	(100%)
<u>Internet website(s) used</u> (Among Users)				
Travel planning/booking	56%	48%	68%	56%
Hotel/resort	55%	50%	66%	53%
Attraction	47%	40%	40%	33%
Destination marketing organization	44%	40%	50%	35%
Airline	43%	37%	67%	46%
Cruise	9%	15%	35%	12%
Motorcoach	1%	6%	3%	1%
Other	35%	30%	31%	25%
Any Internet Purchases in Past 2 Years (Among All Overnight Pleasure Travellers)	55%	43%	68%	47%
	(100%)	(100%)	(100%)	(100%)
<u>Items Purchased On-Line</u> (Among Purchasers)				
Accommodation	79%	73%	77%	72%
Air tickets	66%	64%	86%	71%
Car rental	38%	40%	55%	39%
Tickets for activities/attractions	36%	35%	34%	27%
Package deal (2+ items)	22%	23%	31%	18%
Rail, bus, boat tickets	15%	14%	27%	12%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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 Campers and RVers (see Table 20). Fewer than 1-in-20 say they relied on a package deal for *all* or *most* of their trips over the past two years or so and a further 1-in-5 have used package deals for *one* or *some* of these trips.

Campers and RVers 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	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
Frequency of Purchasing Packages in Past 2 Years				
Most/all trips	3%	4%	7%	5%
One/some trips	21%	23%	42%	20%
No trips/not stated/not sure	76%	73%	51%	75%
Desired Components of Packages (Among Purchasers of Packages)				
	(100%)	(100%)	(100%)	(100%)
Accommodation	92%	91%	96%	91%
Transport to destination	82%	83%	89%	85%
Transport at destination	68%	70%	74%	67%
Tickets for activities/attractions	67%	68%	68%	62%
Food and beverage	53%	61%	52%	52%
Other	26%	26%	26%	22%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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 Campers and RVers are a **break from the day-to-day environment** and the trip's ability to **relieve stress** (see Table 21).³⁵ At least three-quarters of these markets attach a high level of importance to these attributes.

Approximately two-thirds want their vacations to be the basis of lasting **memories** and/or to help **enrich familial relationships** while over half of Campers (56%) and even more RVers (63%) regard **abandoning a fixed schedule** as a highly important benefit of vacations. By and large, these are the same benefits of vacations deemed to be highly important by recent American tourists to British Columbia and American overnight pleasure travellers in general.

5 Top Highly Important Benefits in Rank Order Among Campers, RVers and Recent Pleasure Tourists to British Columbia and Any Destination³⁶

<u>Campers</u>	<u>RVers</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	Break from day-to-day
Relax/relieve stress	Relax/relieve stress	Relax/relieve stress	Relax/relieve stress
Memories	Memories	Memories	Memories
Relations - partner/children	Relations - partner/children	New/different	Relations - partner/children
No fixed schedule	No fixed schedule	Relations - partner/children	No fixed schedule

While not as widely endorsed as those cited above, **seeing and doing something different**, and **keeping family ties alive** are important benefits of pleasure travel experiences for about half of Campers and RVers.

Benefits with *low appeal* to Campers and RVers include **being physically challenged**³⁷, **having stories to tell** once the trip is over, the opportunity to experience **solitude and isolation** and **being pampered**.

³⁵ 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*.

³⁶ For full array, see Table 21.

³⁷ *To be challenged physically/feel physically energized.*

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

	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
<i>% Stating "Highly Important"</i>				
<i>In rank order by Campers</i>				
Break from day-to-day environment	79%	76%	62%	72%
Relax/relieve stress	78%	76%	62%	72%
Create lasting memories	68%	66%	60%	58%
Enrich relationship with partner/children	62%	64%	52%	55%
No fixed schedule	56%	63%	41%	53%
See/do something new/different	48%	43%	59%	43%
Keep family ties alive	47%	50%	38%	46%
Enrich perspectives	28%	25%	36%	23%
Knowledge of history, cultures, places	21%	21%	36%	20%
Renew personal connections (non-family)	20%	20%	19%	19%
Stimulate mind/intellectual challenge	19%	17%	29%	19%
Physical challenge	17%	15%	14%	12%
Solitude and isolation	17%	19%	11%	12%
Stories to share	16%	15%	13%	13%
To be pampered	13%	14%	15%	15%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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 Campers and RVers say that they have taken an overnight pleasure trip during the summer months (95%, 94%, respectively) and 2-in-3 have taken winter trips (see Table 22).

TABLE 22: INCIDENCE OF SUMMER/ WINTER PLEASURE TRIPS	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected	9,973,000	5,119,000	5,340,000	166,003,000
Took Overnight Pleasure Trip in Past 2 Years In . . .				
Summer	95%	94%	90%	82%
Winter	69%	68%	81%	62%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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 close to 2-in-5 Campers (37%) and slightly more RVers (41%) (Table 23). About 1-in-4 of these tourists are members of a frequent flyer program and fewer than one fifth 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.

TABLE 23: MEMBERSHIPS	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected <i>In rank order by Campers</i>	9,973,000	5,119,000	5,340,000	166,003,000
Auto club	37%	41%	59%	43%
Frequent flyer program	28%	24%	62%	31%
Hotel/car rental loyalty program	18%	16%	40%	20%
Sports club	17%	15%	26%	16%
Community service club	13%	13%	18%	10%
Book/reading club	10%	12%	13%	11%
Nature/environmental club	9%	7%	9%	5%
Hobby club	8%	10%	9%	6%
Travel club	4%	11%	11%	4%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 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.

E. Shelter Used Most Often on Camping Trips

Campers say they use a *tent* most often for shelter on recent camping trips (89%) to a much greater extent than they rely on a *tent trailer* for shelter (11%).³⁸ The most common form of shelter on a camping trip among RVers is a *travel trailer* (51%), although close to two-fifths rely on a motor home/RV (38%) and about one-eighth use a *truck camper* as their favoured form of shelter (13%).³⁹

Use of tents and tent/trailers among Campers is appreciably higher than is the case among typical American tourists who have been camping and those who have recently travelled to British Columbia.⁴⁰ Similarly, use of truck campers, travel trailers and motor homes most often on camping trips occurs at a much higher rate among RVers than among Americans who have recently visited British Columbia and American pleasure tourists as a whole. Note that even though all these tourists have taken a camping trip in the past two years, **Campers** and **RVers** identified camping as the *main reason* they took the trip.

TABLE 24: SHELTER USED MOST OFTEN ON CAMPING TRIPS

	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Took Camping Trip in Past Two Years (Weighted, Projected)	9,973,000	5,119,000	1,735,000	38,328,000
Tent	89%	6%	48%	52%
Tent trailer	11%	1%	5%	6%
Truck camper or van	-	13%	7%	4%
Travel trailer/ fifth wheel	1%	51%	13%	15%
Motor home or RV	2%	38%	18%	13%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 46. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. Members of these segments who name both tent/tent trailer and a truck camper/travel trailer or motor home as their most common form of camping shelter are included in both the Camper and RVer segments because they match the definition of both groups.

³⁸ Campers are defined as those who say they use a tent or tent trailer most often on recent camping trips. A minority of these Campers (3%) also indicate other forms of shelter (travel trailer/motor home) as ones used most often. They are included in both the Camper and RVer segments because they match the definition of both groups.

³⁹ RVers who name both tent/tent trailer and a truck camper/travel trailer or motor home as their most common form of camping shelter are included in both the Camper and RVer segments because they match the definition of both groups.

⁴⁰ All U.S. Pleasure Tourists to British Columbia and "any destination" displayed in this table are those who claim to have been camping in the past two years, whether as any activity or a trip or as the main activity.

F. Ownership of Equipment

Ownership of various types of outdoor-oriented equipment such as motor homes, motorboats, canoes and all terrain vehicles (ATVs) is characteristic of fewer than 2-in-10 Campers. Ownership of a snowmobile or sailboat is even less common.

Among RVers, on the other hand, 3-in-4 claim to own an RV (73%), 3-in-10 own a motorboat (30%) and about the same proportion own an ATV (27%). Ownership of these types of equipment is appreciably higher among RVers than it is among recent visitors to British Columbia and the American travelling public as a whole.

TABLE 25: EQUIPMENT OWNERSHIP	Campers	RVers	All U.S. Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(2,940)	(1,501)	(1,706)	(45,697)
Weighted, Projected <i>In rank order by Campers</i>	9,973,000	5,119,000	5,340,000	166,003,000
Motor home, camper, RV	18%	73%	17%	13%
Motor boat	16%	30%	15%	14%
Canoe/kayak	15%	13%	12%	8%
All-terrain vehicle (ATV)	14%	27%	9%	11%
Snowmobile	5%	7%	4%	3%
Sailboat	3%	4%	4%	2%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 45. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

IX. Appendices

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

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

Alberta Tourism, Parks, Recreation and Culture ⁴¹	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.

⁴¹ 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
River Outfitters	White water rafting
Sea Kayaking	Kayaking or canoeing — ocean
Backcountry Lodges	Remote or fly-in wilderness lodge Remote or fly-in wilderness outpost Wilderness lodge you can drive to by car
Cycling/Mountain Biking	Recreational cycling, same day excursion Cycling — as an overnight touring trip Mountain biking
History and Heritage	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
Snowmobiling	Snowmobiling — Day use on organized trail Snowmobiling — As an overnight touring trip
Diving	Scuba diving in lakes/rivers Scuba diving in sea/ocean Snorkelling in lakes or rivers Snorkelling in sea/ocean
Nordic Ski/Related Activities	Cross country skiing Cross country or back country skiing as an overnight touring trip Snow shoeing Dog sledding Ski Jouring

Golfing	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
Alpine Skiing	Downhill skiing
	Heli-skiing
	Snowboarding
Aboriginal Activities	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
Fishing	Fishing — fresh water
	Fishing — salt water
Any Self-Guided Overnight Touring	A self-guided tour that was not part of an organized or guided group on which you stayed in different places for one or more nights
Hiking/Trails	Hiking — same day excursion while on a trip of one or more nights
	Hiking/Backpacking in wilderness settings with overnight camping or lodging
Camping/RVing (NET)	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)
Camping/Tents or RVs	As above, excluding “A motor home or RV while traveling or touring (not a camping trip)”
Camping - Tents	Camping as “Main” and use Tent/Tent Trailer
Camping – RV	Camping as “Main” and use Truck camper/van, Travel trailer/fifth wheel, or Motor Home/RV
RVing (non-camping)	
	A motor home or RV while traveling or touring (not a camping trip) as “Main” AND NO Camping as “Main” and use Truck camper/van, Travel trailer/fifth wheel, or Motor Home/RV

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

Maine
New Hampshire
Vermont
Massachusetts
Connecticut

Rhode Island

Middle Atlantic

New York State
Pennsylvania
New Jersey

South Atlantic

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

East North Central

Wisconsin
Michigan
Illinois
Indiana
Ohio

West North Central

North Dakota
South Dakota
Minnesota
Iowa
Nebraska
Kansas
Missouri

East South Central

Kentucky
Tennessee
Mississippi
Alabama

West South Central

Oklahoma
Arkansas
Texas

Louisiana

Mountain

Montana
Idaho
Wyoming
Nevada
Utah
Colorado

New Mexico

Arizona

Pacific

Washington State
Oregon
California

Alaska**Hawaii**

D. TNS Canadian Facts' "Lifestages" Definitions

1 - YOUNG SINGLES:

1-Member Household

- Age of Head Under 35

2 - MIDDLE SINGLES:

1-Member Household

- Age of Head from 35 to 65

3 - OLDER SINGLES:

1-Member Household

- Age of Head Over 65

4 - YOUNG COUPLE:

Multimember Household

Age of Head Under 45

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

5 - WORKING OLDER COUPLE:

Multimember Household

Age of Head 45 and Over

Head of Household Employed

No Children Present

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

6 - RETIRED OLDER COUPLE

Multimember Household

Age of Head 45 and Over

Head of Household NOT Employed

No Children Present

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

7 - YOUNG PARENT

Multimember Household

Age of Head Under 45

- Youngest Child Under 6

8 - MIDDLE PARENT:

Multimember Household

Age of Head Under 45

- Youngest Child 6+

9 - OLDER PARENT:

Multimember Household

Age of Head 45+

- Child at Home - Any Age

0 - ROOMMATES

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

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

TABLE A1: MAJOR ACTIVITY GROUPS – MAIN & ANY	Overnight Trip Activities - U.S. Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,706)	(1,706)	(45,697)	(45,697)
Weighted, Projected	5,340,000	5,340,000	166,003,000	166,003,000
Outdoor Water Based Activities	40%	68%	30%	56%
Outdoor Land Based Activities	50%	85%	30%	63%
Camping	15%	33%	10%	23%
Cultural/Learning Activities & Events	39%	87%	23%	61%
Theme/Amusement Parks/Movies (Entertainment)	22%	50%	22%	43%
Outdoor Winter Activities	19%	27%	8%	12%
Resorts	23%	54%	13%	32%
Fairs/Festivals	19%	57%	14%	41%
Spectator Sports	21%	41%	14%	27%
Food & Wine	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	(1,706)	(1,706)	(45,697)	(45,697)
Weighted, Projected	5,340,000	5,340,000	166,003,000	166,003,000
Camping	15%	33%	10%	23%
Public campground	12%	27%	7%	17%
Private campground	6%	15%	4%	10%
Camp site in wilderness setting	4%	9%	2%	5%
Sunbathing or sitting on a beach	14%	36%	13%	29%
Swimming in oceans	9%	33%	9%	28%
Alpine skiing/snow boarding	13%	17%	6%	8%
Nature park	23%	50%	10%	27%
A public campground in national/state/provincial park	12%	27%	7%	17%
Fishing	11%	23%	8%	19%
Fresh water	8%	17%	6%	15%
Salt water	5%	12%	3%	7%
Swimming in lakes	5%	21%	4%	16%
Well known natural wonders	19%	48%	7%	21%
Scuba diving/snorkelling	7%	26%	3%	12%
Snorkelling in seas/oceans	5%	24%	2%	11%
Seaside resorts (lodging)	12%	34%	7%	19%
Hiking - same day excursion on overnight trip	8%	36%	4%	18%
Hiking/backpacking as an overnight trip	6%	9%	3%	4%
Flora/fauna viewing	17%	50%	5%	21%
Wildlife viewing – land based animals	10%	33%	3%	13%
Wildflowers/flora	5%	25%	2%	9%
Whale watching	10%	31%	2%	8%
Bird watching	5%	20%	1%	7%
Cycling	6%	15%	2%	6%
Recreational cycling	4%	12%	1%	5%
Mountain biking	3%	6%	1%	2%

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

TABLE A3: OTHER INDIVIDUAL ACTIVITIES – MAIN & ANY*

	Overnight Trip Activities - U.S. Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,706)	(1,706)	(45,697)	(45,697)
Weighted, Projected	5,340,000	5,340,000	166,003,000	166,003,000
Cultural & Heritage				
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%
Entertainment				
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%
Food & Wine				
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%
Shopping				
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 Campers or RVers as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.