



RESEARCH & PLANNING

Travel Activities and Motivations of Canadian Visitors to BC: Activity Profile

Focus on Backcountry Lodge Guests

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

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

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
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I. Executive Summary

BACKCOUNTRY LODGE GUESTS ARE A NICHE MARKET FOR BRITISH COLUMBIA

At over 500,000, *Backcountry Lodge Guests* – Canadian adults who take vacations *in order to stay in a Wilderness Lodge or Outpost* – are an important tourism market. They represent 1-in-34 of the 20.0 million Canadian overnight pleasure travellers to *any destination* and 1-in-38 of the 6 million Canadians who have come to British Columbia for a vacation in the past two years or so.

MOST BACKCOUNTRY LODGE GUESTS GO TO PROPERTIES ACCESSIBLE BY CAR.

Most Backcountry Lodge Guests have recent experiences at wilderness lodges that are accessible by car (80%), followed by remote or fly-in wilderness lodges (24%), and less commonly, fly-in outposts (9%).

THEY LIVE IN EVERY CANADIAN PROVINCE BUT ARE CONCENTRATED IN CENTRAL CANADA.

Backcountry Lodge Guests live in every province but not surprisingly, are apt to reside in provinces where opportunities to stay in a *backcountry lodge or outpost* are most prevalent – such as Central Canada and to a lesser degree in the West.

Staying at a *backcountry lodge or outpost* seems to be particularly popular among pleasure tourists who reside in the larger cities in Central Canada, such as **Toronto** and **Montreal**. Close proximity to ‘cottage country’ and the Great Lakes could be an influencing factor. **Vancouver** has the highest percentage of Backcountry Lodge Guests in the West. In contrast, Backcountry Lodge Guests are less likely to live in the Maritimes and the Prairie Provinces.

Regional marketing efforts to attract Backcountry Lodge Guests may be challenging, particularly in light of increased airfares, as these tourists are concentrated in Montreal and Toronto.

BACKCOUNTRY LODGE GUESTS TEND TO BE MIDDLE-AGED MEN.

Men predominate with only 3-in-10 Backcountry Lodge guests being women. While every age group is represented among Backcountry Lodge Guests, they tend to be concentrated in **the middle of the age spectrum**. Less than 1-in-10 are young adults (18 to 24 years) but 1-in-5 are in their mid-twenties to mid-thirties or their mid-thirties to mid-forties and 1-in-4 are in their **mid-forties to mid-fifties** or are 55 years of age or older. Nearly **one-half** of **male and female** Lodge Guests are between **35 to 54 years of age**.

BACKCOUNTRY LODGE GUESTS ARE EDUCATED AND AFFLUENT.

Tourists in this niche market tend to be more educated (over one-half of Lodge Guests have a **post-secondary diploma or University degree**), are more apt to be full-time paid employees (over one-half) and have higher incomes (one-third of earn between **over \$100,000**) than typical Canadian pleasure tourists.

OVER 1-IN-4 CANADIAN BACKCOUNTRY LODGE GUESTS HAVE BEEN TO BRITISH COLUMBIA ON A RECENT OVERNIGHT PLEASURE TRIP.

Although British Columbia attracts over one-quarter of Lodge Guests, it is not as successful in attracting them vis à vis the general travelling public in Canada (30.1%).

QUEBEC AND ONTARIO ARE THE MAIN COMPETITORS FOR THESE TRAVELLERS.

Quebec (56.7%) and **Ontario** (55.1%) are the main provincial competitors for Canadian Lodge Guests. The **United States** clearly leads the International market (51.0%) but other foreign competitive destinations for Lodge Guests include the Caribbean, Europe and Mexico.

A SAFE DESTINATION IS A PRIORITY.

Most Lodge Guests start a trip planning process with a *destination* in mind followed by the **activities** they want to enjoy while on their trip and on the **type of vacation experience** they wish to have. The destination should be *safe*, offer *convenient access by car*, pose *no health concerns*, have *many things for adults to see and do*, offer *mid-range accommodation*, and have *direct access by Air*.

BACKCOUNTRY LODGE GUESTS ARE MULTI-DIMENSIONAL TRAVELLERS BUT TEND TO BE OUTDOOR TOURISTS.

There is considerable overlap between Lodge Guests and other outdoor sectors of interest to tourism businesses in British Columbia. As demonstrated by their representation in other activity-based tourism sectors, Lodge Guests are multi-dimensional travellers. 3-in-5 Lodge Guests are also **Anglers**, 1-in-2 are **Campers/RVers**, 1-in-4 are **History & Heritage Tourists** and/or **travellers on a self-guided tours** and 1-in-5 are **Hikers**

Backcountry Lodge Guests are five times as likely to be Anglers, more than four times as likely to be Snowmobilers and/or Aboriginal Activity Tourists and more than three times as likely to be Nordic Skiers and/or Divers/Snorkellers. They are more than twice as likely to be, Campers/RVers, Cyclists/Mountain Bikers, Hikers, Golfers, Sea Kayakers, History & Heritage Tourists and River Rafter, than are the Canadian travelling public as a whole. This market is clearly motivated by outdoor activities.

THE MARKET INCLUDES PASSIVE AND ACTIVE NATURE SEEKERS.

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

The activity profile described above likely fits the majority of Backcountry Lodge Guests who go to drive-in wilderness lodges rather than fly-in outposts or lodges. There are, however, submarkets within Lodge Guests. For example, hunting and especially **big game hunting** motivate trips for one-fifth of Backcountry Lodge Guests – a rate that is dramatically higher than that evident among all Canadian overnight pleasure travellers (3%). Similarly, Backcountry Lodge Guests are much more likely to take a trip to **fish** (fresh water 54.3%; salt water 6.6%) and go trophy fishing (5.7%) than is the case among typical Canadian overnight pleasure travellers (fresh water 10.1%; salt water 1.3% and trophy fishing 0.5%). These anglers or hunters may be concentrated among Backcountry Lodge Guests who seek fly-in wilderness outpost or lodge experiences in order to hunt or fish in wilderness settings.

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

By and large, Backcountry Lodge Guests utilize destinations' cultural, culinary and retail infrastructure as *things to see and do* while on overnight pleasure trips rather than as the driving force behind or motivation for their trips. Entertainment-oriented activities in general, and particularly performing arts, festivals and events and spectator sporting events are however, trip motivators for Backcountry Lodge Guests, attracting about 1-in-3 of these tourists.

About one-half have **strolled around a city to observe its buildings and architecture** on recent pleasure trips but less than one-fifth have taken a trip in order to engage in these activities. Similar patterns are evident for seeing **historic sites**, well know and other. These tourists are about 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.

Backcountry Lodge Guests are especially drawn by **amusement parks, zoos, casinos** and going to the **movies**, as things to see and do on recent overnight pleasure trips. All of these entertainment-oriented experiences are much more commonly identified as *one among many* trip activities than as a main reason for taking a trip among Lodge Guests.

Similar to many entertainment-oriented activities, dining out at **restaurants offering local ingredients and cuisine**, visiting **local outdoor cafes** and dining in **high-end restaurants (not with an international reputation)** are much more common trip experiences (any) than trip drivers for Lodge Guests.

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

THE INTERNET TOPS THE CHART AS A TRIP PLANNING TOOL.

Over 6-in-10 Lodge Guests rely on the **internet** for travel information, over 5-in-10 anecdotal information provided by **friends and relatives** and on their own **past experience**, whilst over 3-in-10 rely on **official DMO travel guides, maps, travel agents** and/or **Visitor Information Centres**. In the main, these are the same sources of information that may be influencing Canadian pleasure travellers who have recently done so, to take trips to British Columbia.

BACKCOUNTRY LODGE GUESTS HAVE VERY FAVOURABLE IMPRESSIONS OF BRITISH COLUMBIA.

Canadian Backcountry Lodge Guests are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel; they accord B.C. a rating of 8.3 on a ten-point scale. Though lower than B.C.'s, moderately favourable ratings are accorded a host of destinations, including **Hawaii** (8.2), **Quebec** (7.6), **California** (7.5), **Nova Scotia** (7.4), **Prince Edward Island** (7.2), **Alberta** (7.1), **Ontario** (7.1) and **New Brunswick** (7.0).

British Columbia is given the highest rating as an appealing destination for pleasure travel, and less than ten percent of Canadian Lodge Guests refrained from rating the province, thus indicating that Canadian travellers are knowledgeable about the destination and its touristic appeal.

THEIR LOCATION IN CENTRAL CANADA IS A KEY CHALLENGE IN ATTRACTING BACKCOUNTRY LODGE GUESTS TO BRITISH COLUMBIA.

With their particular constellation of outdoor interests, Canadian Backcountry Lodge Guests seem an ideal market for the province. At present, however, only three percent of Canadian pleasure travellers to the province are Lodge Guests. Regional marketing efforts to attract Backcountry Lodge Guests may be challenging, particularly in light of increased airfares, as these tourists are concentrated in Montreal and Toronto.

TABLE OF CONTENTS

I. Executive Summary.....	3
II. Introduction.....	9
A. BACKGROUND AND OBJECTIVES.....	9
B. THE CANADIAN BACKCOUNTRY LODGE GUESTS REPORT	11
III. Overview of Canadian Tourism Activity Sectors	13
A. THE CANADIAN PLEASURE TRAVEL MARKET TO BRITISH COLUMBIA	13
B. TOURISM ACTIVITY SECTOR SIZE.....	14
C. TOURISM ACTIVITY SECTOR CROSS-OVER.....	16
IV. Backcountry Lodge Guests Market Profile	20
A. MARKET COMPOSITION.....	20
B. REGIONAL AND DEMOGRAPHIC CHARACTERISTICS	21
1. <i>Place of Residence</i>	21
2. <i>Personal and Household Characteristics</i>	23
3. <i>Household Composition</i>	27
V. Competitive Destinations.....	28
A. WORLDWIDE DESTINATIONS FOR OVERNIGHT PLEASURE TRIPS	28
B. DESTINATIONS: ROLES & RATINGS	30
1. <i>Importance of Destination</i>	30
2. <i>Importance of Conditions in Destination Choice</i>	32
3. <i>Appeal of Various Destinations</i>	35
4. <i>Number of Good Reasons to Visit Various Destinations</i>	37
VI. Activities on Overnight Trips.....	39
A. INTRODUCTION.....	39
B. TRIP ACTIVITIES & DRIVERS.....	40
1. <i>Backcountry Lodge Guests' Cross-Over with Other Trip Activity Sectors</i>	40
2. <i>Major Trip Activity Groups</i>	42
3. <i>Individual Trip Activities: The Outdoors</i>	45
4. <i>Individual Trip Activities: Culture, Entertainment, Dining, Shopping & Sports</i>	49
5. <i>Overnight Cruises & Organized Group Tours</i>	53
VII. Trip Planning.....	55
A. WHO DOES THE PLANNING?.....	55
B. TRAVEL INFORMATION SOURCES & TRAVEL MEDIA	56
C. INTERNET USE FOR TRAVEL INQUIRIES & BOOKINGS	59
VIII. Other Travel-Related Information.....	61
A. USE OF PACKAGE DEALS.....	61
B. BENEFITS SOUGHT FROM PLEASURE TRAVEL	62
C. INCIDENCE OF SUMMER/WINTER TRIPS	64
D. MEMBERSHIPS IN VARIOUS ORGANIZATIONS	65
E. SHELTER USED MOST OFTEN ON CAMPING TRIPS.....	66
F. LODGING	67
G. RECREATION OWNERSHIP	69
IX. Appendices	70
A. ABOUT THE TRAVEL ACTIVITIES AND MOTIVATION SURVEY (TAMS)	70
B. TRIP ACTIVITY SECTOR DEFINITIONS	71
C. TRIP ACTIVITIES – RECENT B.C. AND ANY DESTINATION PLEASURE TRAVELLERS	73

II. Introduction

A. Background and Objectives

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

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

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

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

The Canadian survey consisted of a telephone and a mail back survey:

- The household response rate to the telephone survey was 65.4%.
- Among those who qualified to receive the paper questionnaire, the response rate was 53.5%.
- The Canadian database consists of 53,150 completed records from the telephone survey and 24,692 completed paper questionnaires. The data has been weighted to project the results to the Canadian population.

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 Canadians 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 Canadian tourist profiles based on the recently released 2006 Travel Activities and Motivation Survey (TAMS).²

- River Rafters
- **Backcountry Lodge Guests**
- Recreational Cyclists/Mountain Bikers
- History and Heritage Tourists
- Snowmobilers
- Divers & Snorkellers
- Nordic Skiers & Other Non-Alpine Winter Sport Participants³
- Golfers
- Alpine Skiers
- Aboriginal Activity Tourists
- Anglers
- Self-Guided Overnight Touring Travellers
- Hikers
- Campers/RVers

Even though these profiles span a wide range of tourism experiences, it is recognized that they cover only a fraction of the experiences British Columbia offers its tourists. This profile describes **Backcountry Lodge Guests**.⁴

² See Appendix for a brief description of the TAMS study and the activities used to define each of the activity sectors.

³ 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.

⁴ *Backcountry Lodge Guests* are commonly referred to throughout this report as *Lodge Guests*.

B. The Canadian Backcountry Lodge Guests Report

For purposes of this report, Canadian **Backcountry Lodge Guests** (*Lodge Guests*) are Canadian adults (18 years of age or over) who claim to have taken an overnight pleasure trip to any destination in the past two years⁵ 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

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

People who take a trip *in order to go to a backcountry lodge or outpost* are only a fraction of tourists who go to *these types of properties* on their vacations. Of the 20.9 million Canadian travellers, 2% (315,928) stayed at a *remote or fly-in wilderness lodge*, 1% (118,812) stayed at a *remote or fly-in wilderness outpost* and 5% (1,132,204) *drove by car to a Wilderness lodge*.⁶

Lodge Guests 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

Note to Readers

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

In other words, Canadian Lodge Guests claim to have taken an overnight trip motivated by a stay in a wilderness lodge or outpost in the past two years or so and to have taken overnight pleasure trips to specific destinations but TAMS does not provide information that links the activities to the destination(s) visited. Thus, Lodge Guests may or may not have been at a wilderness lodge or outpost in a particular country, province or state they have visited recently for an overnight pleasure trip.

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 *Travel Activities and Motivations of Canadian Residents: An Overview*, Tourism BC, May 2007, pg 22 http://www.tourism.bc.ca/pdf/TAMSCan2006_Overview.pdf

- Competitive destinations
- Ratings of British Columbia as a destination
- Other popular trip activities
- Trip planning and media behaviour
- Benefits of travel

III. Overview of Canadian Tourism Activity Sectors

A. The Canadian Pleasure Travel Market to British Columbia

Tourism businesses in British Columbia are competing for the attention of about 20 million Canadian adults who are in the market for overnight vacations (see Table A).⁷ These individuals claim to have taken at least one overnight pleasure or vacation trip over a two-year period. They represent three-fifths of the 33 million Canadians.

Over two-fifths (42.9%) of the Canadian overnight pleasure travel market, or about 8.6 million tourists, have had *some* experience with British Columbia over the past decade.⁸ They may have been on a vacation or visiting friends and relatives while on their pleasure trip to the province. Of overnight travellers who took trips for any reason, just under one third claim to have visited British Columbia in the past two years or so (30.1% or 6.0 million).

TABLE A: OVERVIEW OF BRITISH COLUMBIA'S MARKET SIZE	Recent Canadian Pleasure Travellers Any Destination	
Unweighted base	(23,156)	
Weighted, Projected	19,946,295	
Overnight Trips to British Columbia		
Pleasure, past 10 years	8,555,082	42.9%
Pleasure, past 2 years	6,002,103	30.1%

Source: Canadian TAMS Special Tabulations prepared for Tourism British Columbia.

Most of these recent Canadian visitors to the province – 6 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 20 million Canadian overnight pleasure travellers, they have attracted 1-in-3 (30.1%) of these tourists to the province over a two-year period. The profiles of various activity-based sectors⁹ described in this report are based on Canadians who have taken a recent overnight pleasure trip to *any destination* (20 million) and, where feasible, on the subset of these tourists who have been to British Columbia over the two-year period (6 million).¹⁰

⁷ Adults are defined as individuals 18 years of age or older.

⁸ 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.

⁹ 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.

¹⁰ 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 Size¹¹

Several outdoor-oriented tourism segments of importance to British Columbia represent relatively small *niche* markets, both within the overall Canadian pleasure travel market and among those who have recent tourism experience in British Columbia.¹² Examples of these niche markets include **River Rafters** and **Sea Kayakers**. Each of these sectors represents approximately 1-in-100 Canadian overnight pleasure travellers [see Table B].

Trips driven by **snowmobiling** or **diving and snorkelling** are slightly more common, representing about 1-in-40 Canadian overnight pleasure tourists. **Aboriginal activity tourists**, those staying in **wilderness or remote lodges** and **Nordic skiers** represent about 1-in-33 Canadian pleasure visitors. **Cyclists** represent 1-in-26 pleasure tourists while **Golfers** represent 1-in-17 and **Hikers** 1-in-13.

TABLE B: OVERVIEW OF SELECTED SECTOR MARKET SIZE	Canadian Overnight Pleasure Travellers In Past 2 Years				
	Any Destination		British Columbia		Index**
Unweighted base	(23,156)		(7,788)		
Weighted, Projected	19,946,295		6,002,103		
<i>In Rank Order by Tourists to British Columbia</i>					
Self-Guided Overnight Touring Travellers	3,531,758	17.7%	1,345,572	22.4%	127
Campers/RVers	3,205,733	16.1%	1,062,448	17.7%	110
Alpine Skiers	1,942,803	9.7%	896,103	14.9%	154
History and Heritage Tourists	2,420,162	12.1%	731,231	12.2%	100
Anglers	2,277,825	11.4%	651,917	10.9%	96
Hikers	1,523,989	7.6%	565,180	9.4%	124
Golfers	1,109,796	5.6%	431,021	7.2%	129
Recreational Cyclists/Mountain Bikers	761,808	3.8%	288,960	4.8%	126
Nordic Skiers	632,917	3.2%	225,129	3.8%	119
Aboriginal Activity Tourists	564,047	2.8%	220,826	3.7%	132
Divers & Snorkellers	459,261	2.3%	202,907	3.4%	148
Backcountry Lodge Guests	578,207	2.9%	155,296	2.6%	90
Snowmobilers	498,926	2.5%	112,498	1.9%	76
River Rafters	215,481	1.1%	98,220	1.6%	145
Sea Kayakers	153,231	0.8%	84,351	1.4%	175

Source: Canadian TAMS Special Tabulations prepared by Tourism British Columbia.

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. **Index calculation: Percentage of Pleasure visitors to BC in activity sector divided by All Canadian Pleasure (Any Destination) in activity sector, multiplied by 100.

¹¹ Does not represent all participants in this activity, but instead represents those who were motivated to travel to participate in this activity.

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, Alpine Skiing** and **Angling** are more widespread, representing more than 1-in-10 Canadian overnight pleasure tourists and considerably higher proportions of those who have recently visited British Columbia.

An index that compares the proportion of *all* Canadian 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 Canadian overnight pleasure travel market (such as History and Heritage Tourists). 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 (such as Anglers, **Backcountry lodge guests** and Snowmobilers).

Based on this index, British Columbia is attracting Canadians in **each** sector at a **higher rate** than they occur in the Canadian travelling public:

- Sea Kayakers
- Alpine Skiers
- Divers & Snorkellers
- River Rafters
- Aboriginal Activity Tourists
- Golfers
- Self-Guided Overnight Touring Travellers
- Cyclists/Mountain Bikers
- Hikers
- Nordic Skiers
- Campers/RVers

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 an 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 two sectors, **Sea Kayaking** and **Back-county lodge guests**, are at least half the members *also* members of another key sector: Hikers and Anglers (respectively) (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%+							
49%-45%							
44%-40%		History/Heritage				Hikers	
						Campers/RVers	
39%-35%		Campers/RVers				Self-Guided Touring	Anglers
							Campers/RVers
34%-30%	Self-Guided Touring	Campers/RVers			Campers/RVers	Alpine Skiers	
	Campers/RVers	Self-Guided Touring				Cycling/Mtn Biking	
29%-25%		Hikers			Self-Guided Touring	History/Heritage	
24%-20%		Anglers	History/Heritage	Self-Guided Touring	History/Heritage		Self-Guided Touring
			Campers/RVers	History/Heritage	Hikers		
				Anglers			
				Hikers			
				Alpine Skiers			

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, Campers, Self-Guided Touring travellers, Alpine Skiers and Cyclists.

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 (30% to 34%) 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 <i>At least 20% Duplication</i>								
<i>Level of Duplication</i>	RIVER RAFTERS	SEA KAYAKERS	BACK- COUNTRY LODGES	CYCLISTS	HIKERS	DIVERS/ SNORKEL- LERS	GOLFERS	ANGLERS
50%+		Hikers	Anglers					
49%- 45%			Campers/ RVers		Campers/ RVers			
44%- 40%	Alpine Skiers			Campers/ RVers				
39%- 35%	Campers/ RVers			Hikers		Alpine Skiers		
	Self- Guided Touring							
34%- 30%	Hikers	Campers/ RVers		Alpine Skiers	Self- Guided Touring	Self- Guided Touring		Campers/ RVers
		Alpine Skiers		Self- Guided Touring	History/ Heritage	Anglers		
		Self- Guided Touring				Campers/ RVers		
29%- 25%		Nordic Skiers	History/ Heritage	History/ Heritage	Alpine Skiers	Hikers		
			Self- Guided Touring	Nordic Skiers				
24%- 20%	Anglers	Cycling/ Mtn Biking		Anglers		History/ Heritage	Campers/ RVers	Self- Guided Touring
		History/ Heritage					Anglers	
							Self- Guided Touring	
							Alpine Skiers	

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

IV. Backcountry Lodge Guests Market Profile

A. Market Composition

The Backcountry Lodge Guest sector is composed of pleasure tourists who have stayed in one or more of three types of lodging as the *main reason* for an overnight trip in the past two years. They represent 1-in-34 of the 20 million Canadian overnight pleasure travellers to *any destination* and 1-in-38 of the 6 million Canadians who have come to British Columbia for a vacation in the past two years or so.

Those who seek a wilderness lodge experience that is accessible by car dominate this sector, representing 4-in-5 Lodge Guests (80%). A further 1-in-4 Canadian tourists claim to have stayed in a remote or fly-in wilderness lodge (24%) and fewer say they have recent experience at a remote or fly-in wilderness outpost (9%).

Table C below illustrates the percentage and total number of Canadian Backcountry Lodge Guests, as well as Canadian Overnight Pleasure Travellers, to any destination and British Columbia, who indicated that their *main trip purpose* was to stay in one or more of three types of lodging listed below:¹³

TABLE C: MAIN REASON FOR TAKING OVERNIGHT TRIPS IN 2004-2005	Total Backcountry Lodge Guests	Total Canadian Pleasure Tourists British Columbia	Total Canadian Pleasure Tourists Any Destination
<i>Unweighted Base</i>	(661)	(7,788)	(23,156)
<i>Weighted, Projected</i>	578,207	6,002,103	19,946,295
Backcountry Lodge Guests	578,207	155,296	578,207
<i>Percentage</i>	100%	2.6%	2.9%
Remote/Fly-In Wilderness Lodge	140,406	62,983	140,406
<i>Percentage</i>	24.3%	1.0%	0.7%
Remote/Fly-In Wilderness Outpost	51,455	23,295	51,455
<i>Percentage</i>	8.9%	0.4%	0.3%
Wilderness Lodge by Car	461,156	98,524	461,156
<i>Percentage</i>	79.8%	1.6%	2.3%

Source: Canadian TAMS Special Tabulations, prepared by Tourism British Columbia.

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

¹³ Some Backcountry Lodge Guests have stayed in more than one type of backcountry lodge over a two-year period, explaining why the percentages shown above add to more than one hundred percent.

B. Regional and Demographic Characteristics

1. Place of Residence

At close to 600,000, **Backcountry Lodge Guests** – Canadian adults who take vacations *in order to go to a backcountry lodge or outpost* - are a niche market. They represent 1-in-34 Canadian overnight pleasure travellers to *any destination* (2.9%) and 1-in-38 of the six million Canadians who have come to British Columbia for a vacation in the past two years or so (2.6%).

Table 1 provides the place of residence by city, which emerge as noteworthy for Backcountry Lodge Guests.

Backcountry Lodge Guests live in every province but not surprisingly, are apt to reside in provinces where opportunities to stay in a *backcountry lodge or outpost* are most prevalent – such as Central Canada and to a lesser degree in the West.

- Staying at a *backcountry lodge or outpost* seems to be particularly popular among pleasure tourists who reside in the larger cities in Central Canada, such as **Toronto** (14.6%) and **Montreal** (14.2%). Close proximity to ‘cottage country’ and the Great Lakes could be an influencing factor.
- **Vancouver** has the highest percentage of **Backcountry Lodge Guests** (4.6%) in the West.
- In contrast, **Backcountry Lodge Guests** are less likely to live in the **Maritimes** and the **Prairie Provinces** (with the **exception of Winnipeg**, with 2.3% of Lodge Guests residing in the area).

Regional marketing efforts to attract Backcountry Lodge Guests may be challenging, particularly in light of increased airfares, as these tourists are concentrated in Montreal and Toronto.

TABLE 1: PLACE OF RESIDENCE	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
Incidence of Backcountry Lodge Guests	100%	2.6%	2.9%
Maritimes			
Halifax	0.6%	0.6%	1.2%
Quebec			
Quebec City	3.6%	0.4%	2.3%
Montreal	14.2%	4.1%	11.6%
Ontario			
Ottawa	1.2%	2.0%	2.9%
Oshawa	1.8%	0.5%	1.1%
Toronto	14.6%	9.1%	16.6%
Hamilton	1.4%	1.3%	2.2%
Kitchener	1.0%	0.7%	1.5%
Windsor	1.2%	0.3%	1.0%
Manitoba			
Winnipeg	2.3%	2.4%	2.1%
Saskatchewan			
Regina	0.8%	0.9%	0.6%
Saskatoon	0.8%	1.2%	0.8%
Alberta			
Calgary	2.0%	9.0%	3.7%
Edmonton	1.9%	7.6%	3.4%
British Columbia			
Vancouver	4.6%	20.6%	7.7%
Victoria	0.5%	3.2%	1.1%

Source: Canadian TAMS Special Tabulations, prepared for Tourism British Columbia. "All Canadian Pleasure Tourists" are Canadians 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 Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

2. Personal and Household Characteristics

Age & Gender

While every age group is represented among Backcountry Lodge Guests, they tend to be concentrated in **the middle of the age spectrum**. Less than 1-in-10 are young adults (18 to 24 years, 8.7%) but 1-in-5 are in their mid-twenties to mid-thirties (18.5%) or their mid-thirties to mid-forties (20.5%) and 1-in-4 are in their **mid-forties to mid-fifties** (26.1%) or are 55 years of age or older (26.4%) (see Table 2).

While Lodge Guests' age distribution closely resembles the age profile of all Canadian tourists and the typical Canadian visitor to British Columbia, it differs from both particularly in the **mid-forties to mid-fifties** age range, with Lodge Guests representing over 1-in-4 and all Canadian pleasure tourists (to B.C. or Canada) representing 1-in-5.

There are more **male** (65.6%) than female (34.4%) Backcountry Lodge Guests.

Nearly **one-half** of **male** and **female** Lodge Guests are between **35 to 54** years of age (male 45.5%; female 48.5%).

Over one-quarter of both male and female Lodge Guests are between the ages of 18 and 34 years (male 28.3%; female 25.0%) or aged 55 years and older (male 26.3%; female 26.5%).

TABLE 2: AGE & GENDER	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
Age			
18 – 24 Years	8.7%	12.9%	12.7%
25 – 34 Years	18.5%	18.4%	18.8%
35 – 44 Years	20.5%	18.7%	20.4%
45 – 54 Years	26.1%	21.3%	20.2%
55 – 64 Years	15.2%	14.9%	14.4%
65+ Years	11.2%	13.9%	13.5%
Gender			
Men			
18 – 34 Years	28.3%	32.8%	32.2%
35 – 54 Years	45.5%	39.5%	41.0%
55+ Years	26.3%	27.7%	26.7%
Women			
18 – 34 Years	25.0%	29.8%	30.7%
35 – 54 Years	48.5%	40.4%	40.3%
55+ Years	26.5%	29.8%	29.0%

Source: Canadian TAMS Special Tabulations, prepared by Tourism British Columbia. "All Canadian Pleasure Tourists" are Canadians 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 Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

Education, Occupation and Income

Backcountry Lodge Guests are **well educated** and they are more **affluent** than Canadian pleasure visitors (to B.C. or Canada).

One-third of Lodge Guests report annual household incomes **over \$100,000** bracket (33.4%); this is higher than Canadian travellers as a whole (22.4%) and visitors to B.C. (29.3%). Over one-quarter have household incomes between \$60,000-\$99,999 (27.6%) and under one-fifth fall in the \$40,000-\$59,999 (17.2%) and under \$40,000 categories (15.9%).

Over one-quarter of Lodge Guests have a **university degree** (27.4%) and just under one-quarter have a **post-secondary diploma or certificate** (23.8%), whereas one-fifth of Canadian travellers (to B.C. or Canada) have a post-secondary diploma or certificate.

Not surprisingly in light of the age categories that Lodge Guests fall in, a high percentage are **employed** (53.0%). Their occupation or work status situation closely resembles recent visitors to B.C. and the Canadian travelling public as a whole.

TABLE 3: EDUCATION, OCCUPATION, INCOME	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
Education			
High school diploma or less	36.6%	32.6%	36.7%
Some post-secondary	11.3%	11.9%	10.9%
Post-secondary diploma or certificate	23.8%	19.5%	21.6%
University degree+	27.4%	35.4%	30.0%
Occupation/Work Status			
Work 30+ hrs/week as paid employee	53.0%	58.3%	47.8%
Work as paid employee but part-time (less than 30 hrs/week)	4.9%	6.1%	5.4%
Self-employed/Unpaid worker at a family business	11.2%	12.8%	9.9%
Going to school	5.8%	6.5%	7.2%
Homemaker	2.9%	6.1%	5.5%
Retired	16.6%	17.8%	17.4%
Household Income			
Under \$40,000	15.9%	17.8%	20.6%
\$40,000 - \$59,999	17.2%	13.9%	14.6%
\$60,000 - \$99,999	27.6%	27.0%	27.1%
\$100,000+	33.4%	29.3%	22.4%

Source: Canadian TAMS Special Tabulations prepared by Tourism British Columbia. "All Canadian Pleasure Tourists" are Canadians 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 Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

3. Household Composition

7-in-10 Lodge Guests **live with a spouse or partner** (with or without children) (70.3%) and 2-in-5 live with a spouse/partner and **no children 17 years or younger** (39.1%), with only 1-in-5 have children 17 years or younger (21.8%) (see Table 4).

More Lodge Guests live with **children and no spouse/partner** (9.1%) than to *typical* tourists to British Columbia (5.1%) and any destination (6.7%).

Lodge Guests are less likely to live alone (6.5%) than are *typical* tourists to British Columbia (10.3%) or any destination (10.7%).

TABLE 4: HOUSEHOLD CHARACTERISTICS	Backcountry	All Canadian Pleasure Tourists	
	Lodge Guests	To British Columbia	Any Destination
	Total		
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
"Do you live:"			
Alone	6.5%	10.3%	10.7%
With spouse/partner & no children 17 years or younger	39.1%	38.6%	38.0%
With spouse/partner & children 17 years or under	21.8%	23.5%	22.0%
With spouse/partner & children 18 years & over but none under 17 years	9.4%	7.9%	7.8%
With children and no spouse	9.1%	5.1%	6.7%
Someone other than spouse/child	12.4%	13.4%	13.6%

Source: Canadian TAMS Special Tabulations prepared by Tourism British Columbia. "All Canadian Pleasure Tourists" are Canadians 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 Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

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 Backcountry Lodge Guests indicated that they have taken recent vacations within Canada and nearly 2-in-5 claim to travel *only* within Canada (38.5%), this is significantly higher than for Canadian travellers to B.C. (28.1%) (see Table 5). Over one-half of them have been to the United States on a recent overnight pleasure trip (51.0%), suggesting that America is a particularly attractive destination for these Lodge Guests.

British Columbia is not as successful in attracting Lodge Guests (26.9%) vis-à-vis the general travelling public in Canada (30.1%).

Quebec (56.7%) and **Ontario** (55.1%) are the main provincial competitors for Canadian Lodge Guests.

The **United States** clearly leads the International market (51.0%) but other foreign competitive destinations for Lodge Guests include the *Caribbean* (17.9%), *Europe* (14.3%) and *Mexico* (13.2%).

Note to Readers

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

In other words, Canadian Backcountry Lodge Guests claim to have taken an overnight trip motivated by staying at a wilderness lodge/outpost in the past two years or so and to have taken overnight pleasure trips to specific destinations but TAMS does not provide information that links the activities to the destination(s) visited. Thus, Lodge Guests may or may not have stayed at a wilderness lodge/outpost in a particular country, province or state they have visited recently for an overnight pleasure trip.

TABLE 5: COMPETITIVE DESTINATIONS WORLDWIDE*	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
Canada			
Newfoundland & Labrador	3.5%	3.4%	4.3%
Prince Edward Island	10.4%	6.3%	7.2%
Nova Scotia	17.7%	10.8%	11.7%
New Brunswick	19.5%	9.0%	12.6%
Quebec	56.7%	23.8%	38.5%
Ontario	55.1%	40.2%	52.8%
Manitoba	10.2%	16.0%	9.1%
Saskatchewan	14.1%	23.2%	11.2%
Alberta	26.3%	57.2%	25.4%
British Columbia	26.9%	100%	30.1%
Yukon	2.1%	3.1%	1.0%
Northwest Territories	1.8%	1.8%	0.7%
Nunavut	0.7%	0.5%	0.3%
United States	51.0%	59.8%	50.6%
Other Countries/Regions			
Mexico	13.2%	18.6%	12.0%
South/Central America	7.0%	5.6%	4.8%
Caribbean	17.9%	14.2%	15.4%
Europe (Incl. the UK and Russia)	14.3%	18.7%	15.6%
Asia	2.4%	8.7%	5.5%
Australia/New Zealand/ Africa	3.7%	4.3%	2.9%
Destination patterns			
Only Canada.	38.5%	28.1%	35.6%
Canada & U.S.A. only	63.3%	54.5%	61.2%
Canada & Other Countries (Not USA)	49.0%	40.2%	49.4%
Canada. & Mexico only	40.6%	30.7%	37.3%
U.S.A. only	0.1%	0.0%	2.2%

Source: Canadian TAMS Special Tabulations, prepared by Tourism British Columbia. *Locations visited on overnight pleasure trip, past two years. "All Canadian Pleasure Tourists" are Canadians 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 Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

B. Destinations: Roles & Ratings

1. Importance of Destination

For most Canadian Backcountry Lodge Guests the first consideration in planning their most recent **summer** trip was **destination** (35.4%) (see Table 8). At the same time, one-fifth begins with the **activities** they wish to participate in (20.1%) and on the **type of vacation experience** they wish to have (20.4%). This level of **activity-driven** planning is significantly higher than is the case among typical Canadian tourists to British Columbia (9.6%) or in the Canadian travel market as a whole (10.6%).

Like summer trips, when planning a **winter** trip most Canadian Backcountry Lodge Guests first consideration was the **destination** (33.0%) followed by the **activities** they wish to participate in (15.9%). This level of **activity-driven** planning is higher than is the case among typical Canadian tourists to British Columbia (11.6%) or in the Canadian travel market as a whole (9.1%). A lower proportion of these tourists start their trip planning process with a focus on the **type of vacation experience** they wish to have (14.2%).

Although Lodge Guests put a premium on destination choice *per se*, with just under 6-in-10 claiming that it is *extremely* or *very important* to them (58.6%), this is lower than Canadians with recent pleasure travel experience in British Columbia (63.0%) or travellers as a whole (62.1%).

TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION	Backcountry Lodge	All Canadian Pleasure Tourists	
	Guests	To British Columbia	Any Destination
	Total		
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
First Consideration for Most Recent Summer Trip			
Start with destination	35.4%	43.2%	37.8%
Start with activities	20.1%	9.6%	10.6%
Start with type of vacation experience	20.4%	18.4%	18.5%
Look for package deal (with out destination)	1.9%	1.1%	1.1%
First Consideration for Most Recent Winter Trip			
Start with destination	33.0%	32.5%	28.4%
Start with activities	15.9%	11.6%	9.1%
Start with type of vacation experience	14.2%	12.8%	11.4%
Look for package deal (with out destination)	1.7%	1.4%	1.9%
Importance of Destination			
Extremely/Very Important	58.6%	63.0%	62.1%
Extremely important	18.9%	23.9%	23.1%
Very important	39.7%	39.1%	39.0%
Average*	2.7	2.8	2.8

Source: Canadian TAMS Special Tabulations prepared by Tourism British Columbia. *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 Canadian Pleasure Tourists" are Canadians 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 Canadian 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.¹⁴

Backcountry Lodge Guests resemble Canadian overnight pleasure travellers as a whole in terms of the conditions they accord *high importance* when selecting a destination. Like other Canadian tourists, Lodge Guests put *feeling safe* (58.2%) at the top of their list (see Table 9). Over 4-in-10 Lodge Guests place high importance on a destination that has *convenient access by car* (48.1%) and that has *no health concerns* (46.8%), whilst over 3-in-10 need *many things for adults to see and do* (35.7%) and require the availability of *mid-range lodging* (32.5%).

Summary: Considerations Deemed Highly Important By At Least 1-in-4 Backcountry Lodge Guests¹⁵

	<u>Backcountry</u> <u>Lodge</u> <u>Guests</u>	<u>Canadian Pleasure Tourists</u>	
		<u>To British</u> <u>Columbia</u>	<u>Any</u> <u>Destination</u>
Feeling safe	58.2%	65.1%	65.9%
Convenient Access by Car	48.1%	36.2%	43.3%
No health concerns	46.8%	46.8%	49.9%
Lots for adults to see/do	35.7%	39.2%	38.0%
Mid Range accommodation	32.5%	29.6%	29.6%
Direct Access by Air	25.9%	31.6%	28.9%

Lodge Guests are more apt to take into account the *convenient access by car* (48.1%) and *lots for children to see and do* (18.8%) than are visitors to B.C. (36.2% and 13.7% respectively) or Canadian travellers as a whole (43.3% and 16.4% respectively). Although one-quarter of Lodge Guests indicated that *direct access by air* (25.9%) is an important consideration, this is a lower percentage than visitors to B.C. (31.6%) or Canadian travellers as a whole (28.9%). This does not bode well for British Columbia, as the vast majority of this market is from Central Canada, which is not conveniently accessible by car (to B.C.).

Lodge Guests lodging preference may be a function of their age and life stage. As older more affluent tourists, they are more willing to pay for *mid-range accommodation* (32.5%) and *luxury accommodation* (7.6%) than are visitors to B.C. (29.6% and 5.7%

¹⁴ “Highly important”, “Somewhat important”, and “Of no importance”.

¹⁵ See Table 9 for full array of considerations deemed “highly important” and “of no importance”.

respectively) or Canadian travellers as a whole (29.6% and 6.8% respectively). Another factor influenced by their age is that they are less interested in having *information available on the internet* (19.0%) than are visitors to B.C. (25.7%) or Canadian travellers as a whole (24.6%).

Having convenient access by train/bus, luxury accommodation, great shopping and having friends and relative there and being disabled-person friendly are not rated as being of high importance for Lodge Guests.

TABLE 9: CONDITIONS FOR SELECTING A DESTINATION	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
<i>Bold rows are proportion stating "Highly Important" In rank order by Backcountry Lodge Guests</i>			
Feeling safe	58.2%	65.1%	65.9%
Of no importance	3.7%	3.1%	3.5%
Convenient access by car	48.1%	36.2%	43.3%
Of no importance	7.9%	13.6%	11.5%
No health concerns	46.8%	46.8%	49.9%
Of no importance	6.1%	8.8%	8.2%
Lots for adults to see/do	35.7%	39.2%	38.0%
Of no importance	8.0%	7.2%	7.3%
Mid-range accommodation	32.5%	29.6%	29.6%
Of no importance	11.4%	12.6%	12.8%
Direct access by air	25.9%	31.6%	28.9%
Of no importance	24.7%	17.0%	21.7%
Budget accommodation	20.9%	21.5%	21.7%
Of no importance	24.4%	23.4%	23.8%
Low cost packages available	20.4%	20.9%	22.8%
Of no importance	25.8%	27.3%	23.1%
Information available on internet	19.0%	25.7%	24.6%
Of no importance	37.4%	24.7%	27.1%
Lots for children to see/do	18.8%	13.7%	16.4%
Of no importance	50.4%	62.0%	56.5%
Familiar with culture & language	17.0%	10.8%	13.6%
Of no importance	26.2%	28.6%	26.9%
Camping	16.0%	13.9%	12.8%
Of no importance	43.7%	48.7%	50.6%
Very different culture than own	13.3%	9.1%	8.9%
Of no importance	39.5%	39.6%	39.7%
Convenient access by train/bus	10.8%	11.4%	13.1%
Of no importance	47.6%	40.3%	39.3%
Luxury accommodation	7.6%	5.7%	6.8%
Of no importance	51.7%	57.5%	54.5%
Great shopping	6.5%	11.1%	12.3%
Of no importance	55.5%	45.0%	43.2%
Have friends or relatives there	5.5%	10.2%	11.1%
Of no importance	63.4%	59.6%	59.0%
Disabled-person-friendly	3.1%	3.6%	5.6%
Of no importance	78.3%	79.6%	73.8%

Source: Canadian TAMS Special Tabulations prepared by Tourism British Columbia. **Bold rows** are proportion stating "Highly Important". *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian 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

Canadian Backcountry Lodge Guests are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel; they accord B.C. a rating of 8.3 on a ten-point scale (see Table 10).¹⁶ Though lower than B.C.'s, moderately favourable ratings are accorded a host of destinations, including **Hawaii** (8.2), **Quebec** (7.6), **California** (7.5), **Nova Scotia** (7.4), **Prince Edward Island** (7.2), **Alberta** (7.1), **Ontario** (7.1) and **New Brunswick** (7.0).

Summary: Most Appealing Destinations among Backcountry Lodge Guests (with an average score of at least 7.0)¹⁷

	<u>Lodge</u> <u>Guests</u>	<u>Canadian Pleasure</u> <u>Tourists</u>	
		<u>To British</u> <u>Columbia</u>	<u>Total</u>
British Columbia	8.3	9.0	8.8
Hawaii	8.2	8.1	8.3
Quebec	7.6	6.7	9.0
California	7.5	7.4	8.4
Nova Scotia	7.4	7.2	8.4
Prince Edward Island	7.2	7.2	8.3
Alberta	7.1	7.3	8.5
Ontario	7.1	6.6	9.2
New Brunswick	7.0	6.5	8.3

British Columbia is given the highest rating as an appealing destination for pleasure travel, and less than ten percent of Canadian Lodge Guests refrained from rating the province, thus indicating that Canadian travellers are knowledgeable about the destination and its touristic appeal.

The impact of direct experience¹⁷ with a destination seems to play a role in Canadian consumers' appraisals. For example, among Canadians who have recently travelled to British Columbia, the province's overall appeal rating is higher (9.0) than that volunteered by all Canadian pleasure travellers (8.8). The challenge, of course, is getting these Backcountry Lodge Guests back to the province!

¹⁶ 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 destinations included in this question, presumably because they did not have sufficient information about the destination to form a clear image.

¹⁷ See Table 10 for full array of average ratings and proportion unable/unwilling to rate each destination.

TABLE 10: APPEAL OF VARIOUS DESTINATIONS

Backcountry Lodge Guests	All Canadian Pleasure Tourists		
	To British Columbia	Any Destination*	
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
<i>Bold rows are average ratings**</i>			
British Columbia	8.3	9.0	8.8
No rating provided	9.4%	2.1%	12.4%
Newfoundland & Labrador	6.6	6.8	7.9
No rating provided	19.3%	19.5%	21.5%
Nova Scotia	7.4	7.2	8.4
No rating provided	10.9%	14.5%	16.3%
New Brunswick	7.0	6.5	8.3
No rating provided	10.0%	16.8%	16.9%
Prince Edward Island	7.2	7.2	8.3
No rating provided	10.9%	15.5%	16.6%
Quebec	7.6	6.7	9.0
No rating provided	7.5%	11.1%	10.2%
Ontario	7.1	6.6	9.2
No rating provided	4.7%	8.0%	8.0%
Manitoba	5.1	4.8	7.9
No rating provided	18.1%	14.6%	21.1%
Saskatchewan	5.0	4.8	7.9
No rating provided	17.5%	13.4%	20.7%
Alberta	7.1	7.3	8.5
No rating provided	13.2%	6.8%	15.3%
Yukon	6.1	6.4	7.5
No rating provided	20.7%	19.5%	24.9%
Northwest Territories	5.5	5.8	7.4
No rating provided	21.4%	21.1%	25.7%
Nunavut	4.8	5.0	7.2
No rating provided	23.3%	24.3%	28.1%
New York State	6.2	6.2	8.4
No rating provided	14.2%	14.1%	16.0%
Colorado	6.1	6.1	7.6
No rating provided	23.5%	19.9%	24.5%
Florida	6.9	6.5	8.7
No rating provided	10.8%	12.2%	13.5%
California	7.5	7.4	8.4
No rating provided	12.8%	10.5%	16.0%
Hawaii	8.2	8.1	8.3
No rating provided	16.2%	12.5%	17.1%
Arizona	6.6	6.5	7.8
No rating provided	20.0%	15.9%	21.1%

Source: Canadian TAMS Special Tabulations prepared by Tourism British Columbia. ****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. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian 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 Backcountry Lodge Guests' lists for having *many good reasons* to visit on a pleasure trip (see Table 11).¹⁸ Specifically, **British Columbia** tops the list with over 6-in-10 Lodge Guests stating that there are *many good reasons* to go to this destination.

British Columbia surpasses all other Canadian and U.S. destinations, as a destination that offers Lodge Guests (61.2%) *many good reasons* to visit. Other destinations with many reasons to visit, according to Lodge Guests, are Hawaii (55.9%), Quebec (52.2%), California (45.6%), Ontario (45.6%), and Florida (40.8%).

More Lodge Guests, than Canadian pleasure tourists to B.C. and Canada, state that there are many good reasons to visit **Quebec** (52.2%) (visitors to B.C 35.3%, visitors to Canada 41.6%), **Ontario** (45.6%) (visitors to B.C 35.4%, visitors to Canada 43.3%) or **New Brunswick** (30.5%) (visitors to B.C 21.3%, visitors to Canada 22.9%).

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

		<u>Canadian Pleasure Tourists</u>			
<u>Backcountry</u>		<u>To British Columbia</u>		<u>Total</u>	
<u>Lodge Guests</u>					
B.C.	61%	B.C.	83%	B.C.	65%
Hawaii	56%	Hawaii	56%	Hawaii	55%
Quebec	52%	California	50%		

As with the *appeal* rating discussed in the previous chapter, the province has a favourable image among those who have experienced what it can offer.

¹⁸ 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*.

TABLE 11: NUMBER OF REASONS TO VISIT VARIOUS DESTINATIONS	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
<i>% stating "MANY" good reasons to visit In Rank order by Backcountry Lodge Guests</i>			
British Columbia	61.2%	83.4%	64.6%
Hawaii	55.9%	55.5%	54.6%
Quebec	52.2%	35.3%	41.6%
California	45.6%	49.8%	47.1%
Ontario	45.6%	35.4%	43.3%
Florida	40.8%	35.0%	40.4%
Alberta	38.4%	45.3%	34.9%
Prince Edward Island	35.3%	33.8%	32.0%
Nova Scotia	34.6%	33.5%	32.4%
Newfoundland & Labrador	32.5%	30.3%	27.4%
New Brunswick	30.5%	21.3%	22.9%
Yukon	24.9%	22.1%	16.9%
New York State	23.8%	30.8%	30.4%
Arizona	23.7%	22.1%	22.9%
Colorado	20.9%	17.8%	18.7%
Northwest Territories	18.3%	15.5%	12.3%
Nunavut	13.0%	11.0%	9.1%
Saskatchewan	11.0%	10.1%	7.7%
Manitoba	9.2%	8.6%	7.5%

Source: Canadian TAMS Special Tabulations prepared by Tourism British Columbia. Proportions are those stating MANY good reasons to visit. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian 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*.¹⁹

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 at a wilderness lodge/outpost** 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 staying at wilderness lodge/outpost 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* Lodge Guests to take overnight pleasure trips (*main reason*) and the level of *any* participation in these same activities.

Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Backcountry Lodge Guests provided in this chapter are appended.

¹⁹ Presumably, “these trips” are those on which the specific activity took place.

B. Trip Activities & Drivers

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

As demonstrated by their representation in other activity-based tourism sectors, Backcountry Lodge Guests are multi-dimensional travellers.²⁰

3-in-5 Lodge Guests are also **Anglers**, 1-in-2 are **Campers/RVers**, 1-in-4 are **History & Heritage Tourists** and/or **travellers on a self-guided tour** and 1-in-5 are **Hikers** (see Table 12).

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

Lodge Guests are more apt than the Canadian travelling public as a whole to be members of *other* activity-based segments:

- Backcountry Lodge Guests are five times as likely to be Anglers.
- They are more than four times as likely to be Snowmobilers and/or Aboriginal Activity Tourists.
- They are more than three times as likely to be Nordic Skiers and/or Divers/Snorkellers.
- They are more than twice as likely to be Campers/RVers, Cyclists/Mountain Bikers, Hikers, Golfers, Sea Kayakers, History & Heritage Tourists and River Rafters, than are the Canadian travelling public as a whole.

²⁰ Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Backcountry Lodge Guests provided in this chapter are appended.

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

	Backcountry Lodge Guests	All Canadian Pleasure Tourists		
	Total	To British Columbia	Any Destination*	Index to All Canadian Tourists** Backcountry Lodge Guests
Unweighted base	(661)	(7,788)	(23,156)	
Weighted, Projected	578,207	6,002,103	19,946,295	
<i>In Rank order by Backcountry Lodge Guests</i>				
Backcountry Lodge Guests	100%	2.6%	2.9%	n/a
Anglers	59.0%	10.9%	11.4%	518
Campers/RVers	46.0%	17.7%	16.1%	286
History and Heritage Tourists	25.6%	12.2%	12.1%	212
Self-Guided Overnight Touring Travellers	24.5%	22.4%	17.7%	138
Hikers	19.1%	9.4%	7.6%	251
Alpine Skiers	15.7%	14.9%	9.7%	162
Golfers	12.7%	7.2%	5.6%	227
Aboriginal Activity Tourists	12.4%	3.7%	2.8%	443
Nordic Skiers	12.2%	3.8%	3.2%	381
Snowmobilers	11.3%	1.9%	2.5%	452
Cycling/Mountain Biking	9.8%	4.8%	3.8%	258
Divers & Snorkellers	8.0%	3.4%	2.3%	348
River Rafters	2.2%	1.6%	1.1%	200
Sea Kayakers	1.7%	1.4%	0.8%	213

Source: Canadian TAMS Special Tabulations prepared by Tourism British Columbia. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. **Index calculation: Percentage Backcountry Lodge Guests in activity sector divided by All Canadian Pleasure (Any Destination) in activity sector, multiplied by 100.

2. Major Trip Activity Groups

Like most tourists, Backcountry Lodge Guests take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.²¹

- In addition to taking trips in stay in a wilderness lodge/outpost nearly 4-in-5 Lodge Guests (79%) take trips motivated by engaging in at least one **water-based outdoor activity**.
- Over 2-in-3 Lodge Guests are motivated by the **land-based activities** (67%).
- Nearly 1-in-2 Lodge Guests participate in outdoor **winter activities** (47%).
- Nearly 2-in-5 Lodge Guests are motivated by **theme parks and movies** (39%), the Performing **Arts** (38%), **shopping** and **dining-related** experiences (37%) and to attend **Festivals and Events** (36%).

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, more Lodge Guests *participated* in at least one performing arts experience while on a recent overnight pleasure trip (56.4%) than claim to have taken a trip motivated by one of these activities (37.9%). However, when it comes to outdoor water based activities the difference between *participation* rates (92.7%) and *motivation* rates (78.8%) is not as great as compared to the other categories.

Shopping and dining experiences are especially likely to be “one-of-many” trip activities (86.3%) but the driving force behind a trip for relatively few segment members (36.7%). Similarly, over 6-in-10 went on a recent trip to visit exhibits, historic sites and museums but only 3-in-10 took the trip in order to do so.

Compared to *all* Canadian overnight pleasure travellers, Backcountry Lodge Guests are five times as likely to identify hands-on learning activities, four times as likely to identify aboriginal experiences and three times as likely identify staying in accommodation and participating in air-based activities, as ones that *motivated* recent trips (main reason).

They are twice as likely as *all* Canadian overnight pleasure travellers, to identify outdoor winter activities, theme/amusement parks, outdoor water-based activities, shopping/dining/food related, land-based activities, spectator sports, and performing arts as ones that *motivated* recent trips (main reason).

²¹ Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Backcountry Lodge Guests provided in this chapter are appended.

Summary: Activities that are 2.5 times as likely to have motivated (main reason) a recent overnight trip for Backcountry Lodge Guests, compared to all Canadian Pleasure travellers.

<u>Major Activity Group</u>	<u>Main Reason</u>		<u>Any Participation</u>	
	Back- country Lodge Guests	All Canadian Pleasure Tourists	Back- Country Lodge Guests	All Canadian Pleasure Tourists
Hands-On Learning Activities	19%	4%	30%	13%
Aboriginal Experiences	12%	3%	23%	11%
Accommodation Stayed at	100%	28%	100%	64%
Air-Based Activities	1%	0.3%	3%	1%
Outdoor Winter Activities	47%	17%	60%	30%
Theme/Amusement Parks/Movies	39%	15%	61%	47%

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

TABLE 13: MAJOR ACTIVITY GROUPS – MAIN & ANY	Backcountry Lodge Guests	
	Main Reason	Any Participation
Unweighted base	(661)	(661)
Weighted, Projected	578,207	578,207
<i>In Rank order - Main Reason</i>		
Accommodation Stayed at	100%	100%
Outdoor Water Based Activities	78.8%	92.7%
Outdoor Land Based Activities	67.1%	87.0%
Outdoor Winter Activities	47.0%	60.1%
Theme/Amusement Parks/Movies	38.6%	61.2%
Performing Arts	37.9%	56.4%
Shopping/Dining/Food Related	36.7%	86.3%
Festivals & Events	35.9%	59.2%
Exhibits/Historic Sites/Museums	31.7%	65.7%
Spectator Sports	29.3%	42.5%
Hands-on Learning Activities	19.2%	30.0%
Team Sports/Tournaments/Games	17.4%	28.5%
Aboriginal Experiences	12.4%	23.1%
Air Based Activities	0.9%	2.5%

Source: Canadian TAMS Special Tabulations prepared by Tourism British Columbia.

3. Individual Trip Activities: The Outdoors

When taken as a whole, the outdoor activity profile of Backcountry Lodge Guests suggests a group of tourists seeking comparatively sedentary experiences and passive interactions with nature (see Table 14).²² They seem to want to be in nature rather than to engage nature, with some obvious exceptions such as fishing and hunting. Perhaps these tourists rely on a variety of accommodation options – wilderness lodges and outposts along with campgrounds and various types of resorts – as a way to appreciate natural settings with relatively little effort on their part. Missing as prominent trip drivers for Backcountry Lodge Guests are outdoor activities such as climbing, backpacking, skiing, paddling or rafting.

Water based Activities:

- **Fishing**, especially in fresh water, is a driving force behind recent overnight pleasure trips for over one-half of Lodge Guests (54.3%).
- 3-in-10 Lodge Guests are motivated by the opportunity to **sunbathe on a beach** (30.3%).
- 1-in-5 enjoy **swimming in lakes** (21.3%), whilst over 1-in-10 are motivated by **swimming in oceans** (15.9%) and **motor boating** (12.1%).

Land Based Activities:

- Along with their interest in taking trips to stay in wilderness lodges or outposts, over one-third of Backcountry Lodge Guests take pleasure trips to stay at lake/riverside **resorts** (35.5%) and one-quarter stay at seaside resorts (24.4%).
- 1-in-3 Backcountry Lodge Guests take trips to **camp** (public campground 30.8%), generally within national, provincial or state nature parks or to simply visit the parks (29.6%).
- Close to 2-in-10 are motivated by seeing **well-known natural wonders** (17.2%).
- Over one-tenth of Lodge Guests take trips in order to take day **hikes** (12.6%).

Markets-within-markets

The comparatively passive activity profile described above likely fits the majority of Backcountry Lodge Guests who go to drive-in wilderness lodges rather than fly-in outposts or lodges (see figures on the following page). There are, however, submarkets within Lodge Guests. For example, hunting and especially big game hunting motivate trips for one-fifth of Backcountry Lodge Guests (18.5%) – a rate that is dramatically

²² Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Backcountry Lodge Guests provided in this chapter are appended.

higher than that evident among all Canadian overnight pleasure travellers (3%).²³ Similarly, Backcountry Lodge Guests are much more likely to take a trip to fish (fresh water 54.3%; salt water 6.6%) and go trophy fishing (5.7%) than is the case among typical Canadian overnight pleasure travellers (fresh water 10.1%; salt water 1.3% and trophy fishing 0.5%). These anglers or hunters may be concentrated among Backcountry Lodge Guests who seek fly-in wilderness outpost or lodge experiences in order to hunt or fish in wilderness settings. [See summary table below.]

Summary: Sub-markets - Backcountry Lodge Guests

	<u>Main Reason</u>		<u>Any Participation</u>	
	Lodge Guests	All Canadian Pleasure Tourists	Lodge Guests	All Canadian Pleasure Tourists
Backcountry Lodge Guests				
Wilderness lodge – drive to by car	79.8%	2.3%	81.6%	5.5%
Remote/Fly-In Wilderness Lodge	24.3%	0.7%	24.7%	1.6%
Remote/Fly-In Wilderness Outpost	8.9%	0.3%	9.3%	0.6%
Fishing				
Fishing – Fresh Water	54.3%	10.1%	70.9%	20.5%
Fishing – Salt Water	6.6%	1.3%	10.9%	4.2%
Fishing – Trophy Fishing	5.7%	0.5%	8.1%	0.7%
Hunting				
Hunting – Big Game	18.5%	3.0%	19.3%	3.9%
Hunting – Small Game	10.9%	1.3%	13.2%	2.1%
Hunting – Birds	6.1%	0.9%	8.0%	1.5%

As is evident from the figures shown above, Canadians who go to wilderness lodges as the main reason for a trip are the same people who rely on this form of accommodation as one of their activities (any). In other words, being at a wilderness lodge is the trip's core experience. The findings also suggest that there are sub-markets within the larger Backcountry Lodge Guests market – the big game hunter or sport fisherman or woman at a fly-in lodge or outpost likely represents a different niche than the Lodge Guest who is staying at a drive-in wilderness lodge and enjoying a natural setting in a relatively passive way.

In contrast, many more Backcountry Lodge Guests engage in a variety of other outdoor activities than consider these activities to be the primary motivation for their recent overnight pleasure trips. For example, over two-fifths of them have been to a national or state/provincial nature park, but only 1-in-3 were motivated by this activity.

²³ Hunting is not included in Table 14 because the activities presented in the summary table required that one-third of Backcountry Lodge Guests declare an activity as a main reason for an overnight pleasure trip.

Comparison to Canadian Pleasure Travellers

Compared to the typical Canadian overnight pleasure traveller, a Lodge Guest is more likely to identify passive and active outdoor activities including fishing, hunting, dog Sledding, snowshoeing, viewing wildlife, snowmobiling, ATV'ing and camping, 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 Canadian tourist is further evidence that Backcountry Lodge Guests represent a distinctive market. These Lodge Guests participate in both summer and winter outdoor activities, in fact they are six times more likely than Canadian pleasure traveller to go Ice fishing and dog sledding and five times more likely to go snowshoeing and/or snowmobiling overnight.

Summary of Outdoor activities where Backcountry Lodge Guests are more than *five times* as likely than Canadian Pleasure Travellers to be *motivated by* (main reason) for a recent overnight trip.²⁴ (In rank order from highest - trophy fishing 11 times to lowest- ATV 5 times more likely than Canadian Pleasure Travellers).

	<u>Main Reason</u>		<u>Any Participation</u>	
	Lodge Guests	All Canadian Pleasure Tourists	Lodge Guests	All Canadian Pleasure Tourists
Fishing – Trophy	5.7%	0.5%	8.1%	0.7%
Hunting – Small Game	10.9%	1.3%	13.2%	2.1%
Hunting – Birds	6.1%	0.9%	8.0%	1.5%
Fishing – Ice Fishing	17.5%	2.7%	21.2%	5.2%
Hunting – Big Game	18.5%	3.0%	19.3%	3.9%
Dog Sledding	1.8%	0.3%	3.3%	0.9%
Snowshoeing	6.1%	1.1%	12.1%	4.2%
Fishing – Fresh Water	54.3%	10.1%	70.9%	20.5%
Fishing – Salt Water	6.6%	1.3%	10.9%	4.2%
Wildlife – Viewing Land Based				
Animals	12.5%	2.5%	28.2%	13.6%
Snowmobiling – Overnight	6.0%	1.2%	6.7%	1.7%
All Terrain Vehicle – Overnight	5.0%	1.0%	8.3%	2.1%

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

²⁴ These activities are not included in Table 14 because the activities presented in the summary table required that one-third of Backcountry Lodge Guests declare an activity as a main reason for an overnight pleasure trip.

TABLE 14: INDIVIDUAL OUTDOOR ACTIVITIES –
MAIN & ANY*

	Backcountry Lodge Guests	
	Main Reason	Any Participation
Unweighted base	(661)	(661)
Weighted, Projected	578,207	578,207
<i>In Rank order - Main Reason within each subgroup</i>		
Wilderness Lodge by car (Lodging)	79.8%	81.6%
Fishing – Fresh water	54.3%	70.9%
Lakeside/Riverside Resort (Lodging)	35.5%	48.0%
Camping -Public campground	30.8%	39.8%
Sunbathing or sitting on a beach	30.3%	51.8%
Nature park	29.6%	42.6%
Seaside Resort (Lodging)	24.4%	29.9%
Swimming in lakes	21.3%	52.7%
Camping - Private campground	20.5%	29.8%
Well known natural wonders	17.2%	36.1%
Swimming in oceans	15.9%	35.3%
Hiking Same day excursion	12.6%	32.6%
Motor Boating	12.1%	35.3%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British. *Activities shown here are those that are named by at least 1-in-3 Backcountry Lodge Guests as ones they participated in (any) on a recent overnight trip.

4. Individual Trip Activities: Culture, Entertainment, Dining, Shopping & Sports

By and large, Backcountry Lodge Guests utilize destinations' cultural, culinary and retail infrastructure as *things to see and do* while on overnight pleasure trips rather than as the driving force behind or motivation for their trips.²⁵ Entertainment-oriented activities in general, and particularly performing arts, festivals and events and spectator sporting events are however, trip motivators for Backcountry Lodge Guests (see Table 15), attracting about 1-in-3 of these tourists.

Culture

Backcountry Lodge Guests are more inclined to engage in a variety of cultural and heritage activities as "one-of-many" trip activities than they are to be motivated to take overnight pleasure trips in order to engage in these activities. For example, about one-half have **strolled around a city to observe its buildings and architecture** on recent pleasure trips but less than one-fifth have taken a trip in order to engage in these activities. Similar patterns are evident for seeing **historic sites**, well know and other. These tourists are about 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

Backcountry Lodge Guests are especially drawn by **amusement parks, zoos, casinos** and **going to the movies**, as things to see and do on recent overnight pleasure trips. All of these entertainment-oriented experiences are much more commonly identified as *one among many* trip activities than as a main reason for taking a trip among Lodge Guests.

Dining

Similar to many entertainment-oriented activities, dining out at **restaurants offering local ingredients and cuisine** (Main, 14%; Any, 61%), visiting **local outdoor cafes** (Main, 10%; Any, 47%), and dining in **high-end restaurants (not with an international reputation)** (Main, 9%; Any, 37%) are much more common trip experiences (any) than trip drivers for Lodge Guests.

Shopping

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

²⁵ Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Backcountry Lodge Guests provided in this chapter are appended.

Sports

Attending spectator-sporting events (close to 1-in-3) is trip motivators for Backcountry Lodge Guests. The difference between *participation* rates (4-in-10) and *motivation* rates (3-in-10) is not as great as compared to the other categories.

Comparison to Canadian Pleasure Travellers

As noted in the previous section, compared to *all* Canadian overnight pleasure travellers, Backcountry Lodge Guests are more likely to engage in outdoor activities or take trips for these activities. These wilderness lodge enthusiasts are also more likely than the *typical* Canadian pleasure traveller to identify a wide range of cultural, entertainment and culinary activities as ones that *motivated* recent trips (main reason) or were engaged in on these trips (any participation).

Summary of Outdoor activities where Backcountry Lodge Guests are *six times* more likely than Canadian Pleasure Travellers to be *motivated by (main reason)* for a recent overnight trip.²⁶ (In rank order from highest – Wilderness skills courses 14 times to lowest - Courses to learn another language 6 times more likely than Canadian Pleasure Travellers).

	<u>Main Reason</u>		<u>Any Participation</u>	
	Back- country Lodge Guests	All Canadian Pleasure Tourists	Back- country Lodge Guests	All Canadian Pleasure Tourists
<u>Other Activities</u>				
Wilderness Skills Courses	8.3%	0.6%	9.7%	1.4%
Badminton	1.9%	0.2%	3.0%	1.9%
Aboriginal Outdoor Adventure	1.7%	0.2%	3.1%	1.1%
National/International Sports Event	3.4%	0.5%	3.4%	1.0%
Aboriginal Arts/Craft Shows	5.4%	0.8%	12.1%	4.9%
Amateur Tournaments – Not Sports	3.3%	0.5%	4.6%	1.3%
Aboriginal Heritage Attractions	9.1%	1.4%	17.6%	7.4%
Aboriginal Cuisine (Tasted)	3.9%	0.6%	9.0%	3.3%
Garden Theme Park	8.3%	1.3%	13.8%	6.9%
Science & Technology Theme park	8.1%	1.4%	14.3%	6.7%
Dine at a Farm	4.6%	0.8%	11.4%	5.0%
Interpretive Program	5.1%	0.9%	8.4%	4.7%
Planetarium	2.8%	0.5%	6.4%	3.1%
Courses to Learn Another Language	2.8%	0.5%	4.6%	1.9%

²⁶ These activities are not included in Table 15 because the activities presented in the summary table required that one-third of Backcountry Lodge Guests declare an activity as a main reason for an overnight pleasure trip.

Lodge Guests are about twice as likely to be motivated to go to a casino, shop for books or music, dine at restaurants offering local ingredients, go to festivals and events, go to amusement parks, to attend spectator sports, to attend arts performances, and to visit historic sites than are *typical* Canadian pleasure travellers. They are three times more likely to dine in an outdoor local café, shop for local arts & crafts and go to movies (as a main trip motivator), four times more likely to go to zoos and shop for antiques and five times as likely to participate in Hands-on learning activities than are *typical* Canadian pleasure travellers.

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

TABLE 15: OTHER INDIVIDUAL ACTIVITIES – MAIN & ANY*	Backcountry Lodge Guests	
	Main Reason	Any Participation
Unweighted base	(661)	(661)
Weighted, Projected	578,207	578,207
<i>In rank order by main reason within each subgroup</i>		
Cultural & Heritage		
Any Performing Arts	37.9%	56.4%
Festival & Events	35.9%	59.2%
Hands-on Learning Activities	19.2%	30.0%
Strolling around a city to see architecture	16.1%	45.8%
Historic sites – well known	13.3%	33.4%
Historic sites – other	10.4%	30.6%
Sports		
Spectator Sports (Any)	29.3%	42.5%
Entertainment		
Amusement Park	19.4%	29.5%
Zoos	17.3%	31.1%
Casino	17.2%	31.8%
Movies/cinema	13.1%	35.1%
Food & Dining		
Dining – restaurants offering local ingredients and recipes	13.5%	61.2%
Local outdoor cafes	10.4%	47.0%
Dining - other high-end (not with international reputation)	9.1%	36.5%
Shopping		
Clothing, shoes, jewellery	13.2%	55.1%
Local arts & crafts studios	10.4%	42.7%
Bookstores or music stores	9.3%	46.6%
Antiques	8.6%	30.5%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. *Activities shown here are those that are named by at least about 1-in-3 Backcountry Lodge Guests as ones they participated in (any) on a recent overnight trip.

5. Overnight Cruises & Organized Group Tours

Most Backcountry Lodge Guests are not recent overnight cruise passengers (see Table 16). Of the 1-in-14 Lodge Guests who have taken an overnight ocean cruise in the past two years or so, destinations in the Caribbean and other locations are more popular than Alaska.

Of those who participate in **overnight group tours**, Lodge Guests who have gone on an overnight-organized tour display slightly more preference for tours to *multiple* (14.2%) versus *single* destinations (11.2%). They are also more likely to participate in these tours than are recent Canadian travellers to B.C. (single location 8.2%, multiple locations 12.2%) or any other destination (single location 7.9%; multiple locations 10.2%).

More Lodge Guests claim to have taken **self-directed** same day touring trips over a two-year period (33.9%) than self-directed day tours that are not organized (24.5%).

Favoured themes for organized day excursions include tours around the countryside, wilderness or outdoor tours, city tours, and sightseeing cruises. Backcountry Lodge Guests are more than twice as likely to go on wilderness or outdoor tours, as are *typical* Canadian pleasure travellers.

TABLE 16: CRUISES/GROUP TOURS	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
Took any overnight cruise in past 2 years			
Type of Cruise/Destination			
Ocean (Net)	7.4%	12.6%	8.8%
Ocean – Caribbean	3.8%	5.9%	5.3%
Ocean – Other	2.2%	5.1%	3.2%
Ocean – Alaska	1.6%	4.0%	1.7%
Lake or River cruise (Net)	8.4%	3.0%	4.4%
St. Lawrence River	4.7%	0.7%	1.9%
Other lake/River	4.2%	2.2%	2.3%
Great Lakes	1.7%	0.4%	0.8%
Touring			
Overnight group tour – multiple locations	14.2%	12.2%	10.2%
Overnight group tour – Single Location	11.2%	8.2%	7.9%
Organized group tour – same day	23.8%	28.3%	21.9%
Self-Directed tour – same day	33.9%	34.8%	28.6%
Self-Directed tour – not organized	24.5%	22.4%	17.7%
Unspecified same day tours	4.9%	1.9%	2.9%
Type of Organized Day Tour			
<i>(In rank order by Backcountry Lodge Guests)</i>			
Countryside	29.9%	26.4%	22.0%
Wilderness/outdoor	27.1%	15.6%	12.7%
City	23.5%	28.4%	22.9%
Sightseeing cruise (day excursion)	17.7%	15.9%	12.8%
Casino	9.2%	6.6%	6.5%
Wineries	8.3%	8.7%	5.6%
Airplane/helicopter (pilot or passenger)	3.5%	3.0%	1.9%
Factory	2.5%	4.2%	2.6%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. *To British Columbia* is the subset of *All Canadian Pleasure Tourists* who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

VII. Trip Planning

A. Who Does the Planning?

The majority of Backcountry Lodge Guests claim to have *personal involvement* in trip planning for **all** or **most** trips planned over the past two years.

In most households, the main responsibility for travel planning falls to the Lodge Guest or is shared with other household members.

TABLE 17: TRAVEL PLANNING	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
Frequency of personal involvement in trip planning, past 2 years			
All	64.8%	65.9%	61.8%
Most	17.1%	16.7%	15.1%
Some	12.7%	9.6%	10.3%
None/not stated	5.4%	7.8%	12.8%
Main responsibility for trip planning			
Respondent	39.3%	37.8%	34.9%
Shared with other household member	30.1%	28.7%	27.6%
Spouse/partner	12.0%	15.0%	13.5%
Other/not stated/not involved in travel planning	14.7%	13.0%	14.8%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

B. Travel Information Sources & Travel Media

Of the many sources of travel information available to Backcountry Lodge Guests, the internet tops the chart (see Table 18). Over 6-in-10 of these tourists rely on the **internet** for travel information; over 5-in-10 anecdotal information provided by **friends and relatives** and on their own **past experience**, whilst over 3-in-10 rely on **official DMO travel guides, maps, travel agents** and/or **Visitor Information Centres**. In the main, these are the same sources of information that may be influencing Canadian pleasure travellers who have recently done so, to take trips to British Columbia.

Although not a commonly used source of information, consumer travel shows or sportsmen's shows are more widely used by Backcountry Lodge Guests (8.5%) than by Canadian overnight pleasure travellers as a whole (2.7%) or those who have recently travelled to British Columbia (3.2%).

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

(In rank order in each column)

<u>Backcountry Lodge Guests</u>	<u>Canadian Pleasure Tourists</u>	
	<u>To British Columbia</u>	<u>Total</u>
Internet website	Internet website	Internet website
Advice of friends/relatives	Advice of friends/relatives	Advice of friends/relatives
Past experience	Past experience	Past experience
Official DMO travel guides	Maps	Travel Agent
Maps	Travel agent	
Travel Agent		
Visitor Information Centres		

With most Lodge Guests relying on the internet for travel planning and with nearly one-half (45%) saying that they *normally* visit **travel websites**, the internet has the greatest reach for wilderness lodges and outfitters in British Columbia. Lodge Guests are more apt to watch **televised travel shows** (36.0%) than to read the **travel section** in their daily newspaper (22.5%).

General **travel magazines** such as *Condé Nast* are less popular (14.5%) than are **outdoor activities/sports magazines** such as *Backpacker* or *Outdoor Life* among Lodge Guests (28.2%) but readership for both is higher amongst Lodge Guests than it is for recent visitors to B.C. or the Canadian travelling public as a whole. **General Interest** and

News Magazines are the most popular magazines amongst Lodge Guests (32.5% and 32.3% respectively).

Frequent readership of travel sections in a local newspaper's weekend or weekday editions is more common among Backcountry Lodge Guests than the Canadian travelling public as a whole but is similar to those who have recently travelled to British Columbia.

TABLE 18: INFORMATION SOURCES FOR TRAVEL PLANNING & GENERAL MEDIA HABITS	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
<i>In rank order by Backcountry Lodge Guests</i>			
SOURCES OF TRAVEL PLANNING INFO			
Internet website	64.3%	67.2%	57.2%
Advice of friends/relatives	56.6%	52.4%	44.9%
Past experience	55.0%	52.1%	43.9%
Official DMO travel guides	36.8%	27.2%	22.7%
Maps	34.7%	39.0%	28.6%
Travel agent	34.1%	36.0%	30.4%
Visitor information centres	29.8%	24.7%	20.5%
Articles in Newspaper/Magazine	27.6%	21.3%	18.4%
Advertisements in Newspaper/Magazine	20.2%	12.8%	12.5%
Auto club	18.9%	19.9%	15.6%
Travel guide books	13.7%	18.1%	11.8%
Travel information in mail	13.3%	7.6%	7.8%
Television Programs	12.7%	9.0%	6.6%
Trade, travel, sportsmen's shows	8.5%	3.2%	2.7%
Television Advertisements	7.9%	4.0%	4.5%
Electronic newsletters via e-mail	5.6%	4.6%	3.7%
TRAVEL MEDIA			
Frequently read Travel Section daily newspaper	22.5%	21.1%	17.9%
Frequently read weekend edition of newspaper	24.5%	24.8%	21.9%
Magazines read in typical month			
General Interest	32.5%	33.0%	30.7%
News magazine	32.3%	25.8%	23.6%
Entertainment/Music	31.8%	31.1%	32.0%
Outdoor activities/sports	28.2%	15.4%	12.6%
Home & Garden	27.6%	23.8%	24.5%
Science and geography	22.3%	20.6%	16.3%
Food & Cooking	21.7%	26.2%	26.5%
Business/Finance	21.1%	19.0%	16.0%
Fashion & Beauty	18.8%	21.6%	23.3%
Automobiles/Cycles	17.0%	13.7%	13.1%
Health, fitness and well living	16.7%	24.7%	21.7%
Magazines about your City	15.4%	14.4%	11.7%
Travel	14.5%	11.3%	11.5%
Normally watch Travel Shows on TV	36.0%	33.1%	30.3%
Normally visit Travel websites	45.0%	46.3%	39.0%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

C. Internet Use for Travel Inquiries & Bookings

As noted in the previous section, most Backcountry Lodge Guests and tourists who have taken a recent pleasure trip to British Columbia rely on the internet for travel planning. **Hotel/resort** sites (42.2%), **Destination marketing organization** sites (37.9%), **Travel** sites such as *Expedia* or *Travelocity* (28.2%) and **Airline** sites (27.1%) are the most commonly used websites among these Canadian tourists who rely on the internet for travel planning (see Table 19). Approximately one-quarter of these tourists use **attractions** sites (24.5%).

Not surprisingly, **booking** on-line is less common than is searching for information on the internet. Nonetheless, over 2-in-5 Lodge Guests claim to have made a travel-related booking on-line over the past two years or so (41.1%). As their website preferences would suggest, the most common on-line bookings for Backcountry Lodge Guests is for **accommodation**, followed by **air tickets** and, to a lesser degree, tickets for attractions and car rentals.

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

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
Used Internet website for vacation information, past 2 years	64.3%	67.2%	57.2%
Internet website(s) used			
<i>(Among Users, in rank order by Backcountry Lodge Guests)</i>			
Hotel/resort	42.2%	40.2%	31.9%
Destination marketing organization	37.9%	34.4%	27.7%
Travel planning/booking	28.2%	34.4%	25.6%
Airline	27.1%	39.2%	25.8%
Attraction	24.5%	23.7%	19.1%
Cruise	4.0%	6.2%	4.5%
Motorcoach	2.1%	1.6%	1.4%
Other	22.3%	17.4%	15.4%
Any Internet Bookings in Past 2 Years	41.1%	49.2%	36.6%
<i>(Among All Overnight Pleasure Travellers)</i>			
Items Purchased On-Line			
<i>(Among Users, in rank order by Backcountry Lodge Guests)</i>			
Accommodation	32.0%	33.8%	25.2%
Air tickets	25.5%	39.2%	25.1%
Tickets for activities/attractions	15.0%	11.9%	8.5%
Car rental	12.0%	16.5%	9.8%
Package deal (2+ items)	8.5%	7.7%	5.6%
Rail, bus, boat tickets	7.0%	8.7%	5.6%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

VIII. Other Travel-Related Information

A. Use of Package Deals

Purchase of package deals in the past two years is relatively uncommon among Backcountry Lodge Guests (see Table 20). 1-in-10 say they relied on a package deal for *all* or *most* of their trips over the past two years or so and a further 1-in-3 have used package deals for *one* or *some* of these trips.

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

TABLE 20: PACKAGE DEALS	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
Frequency of Purchasing Packages in Past 2 Years			
Most/all trips	9.7%	5.9%	7.1%
One/some trips	31.0%	27.0%	23.9%
No trips/not stated/not sure	59.3%	67.1%	68.9%
Desired Components of Packages (Among Purchasers of Packages)			
<i>In rank order by Backcountry Lodge Guests</i>	(100%)	(100%)	(100%)
Accommodation	84.5%	84.4%	81.4%
Transport to destination	67.2%	80.2%	72.2%
Food and beverage	53.6%	48.5%	52.2%
Transport at destination	50.0%	51.9%	49.8%
Tickets for activities/attractions	49.4%	43.1%	45.2%
Other	16.7%	11.9%	11.7%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. *To British Columbia* is the subset of *All Canadian 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 for over 7-in-10 Backcountry Lodge Guests is a **break from the day-to-day environment** and the ability to **relieve stress** (see Table 21).²⁷

Over 6-in-10 Backcountry Lodge Guests want their vacations to help **enrich familial relationships**, whilst 5-in-10 want it to be the basis of lasting **memories**, **abandoning a fixed schedule** and to do **something new and/or different** whilst on vacation. Whilst 4-in-10 regard **keeping family ties alive** as a highly important benefit of vacations. By and large, these are the same benefits of vacations deemed to be highly important by recent Canadian tourists to British Columbia and Canadian overnight pleasure travellers in general.

Summary: 5 Top *Highly Important* Benefits in Rank Order Among Backcountry Lodge Guests and Recent Pleasure Tourists to British Columbia and Any Destination²⁸

<u>Backcountry Lodge</u> <u>Guests</u>	<u>Canadian Pleasure Tourists</u>	
	<u>To British Columbia</u>	<u>Total</u>
Break from day-to-day	Break from day-to-day	Break from day-to-day
Relax/relieve stress	Relax/relieve stress	Relax/relieve stress
Enrich Relations – partner/children	Memories	Enrich Relations–partner/children
Memories	Enrich Relations–partner/children	Memories
No fixed schedule	New/different	No fixed schedule

While not as widely endorsed as those cited above **enriching their perspectives on life** and **gaining knowledge of history, other cultures or other places** are important benefits of pleasure travel experiences for about one-quarter of Lodge Guests. Around one-fifth are interested in **stimulating their minds or being intellectually challenged, being physically challenged**²⁹, and/or renewing **connections with people (other than family)**. Benefits with low appeal to Lodge Guests include the opportunity to experience **solitude and isolation, having stories to tell** once the trip is over and **being pampered**.

²⁷ 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*.

²⁸ For full array, see Table 21.

²⁹ To be challenged physically/feel physically energized.

TABLE 21: BENEFITS SOUGHT FROM PLEASURE TRAVEL	Backcountry Lodge	All Canadian Pleasure Tourists	
	Guests	To British Columbia	Any Destination*
Unweighted base	Total (661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
<i>% Stating "Highly Important"</i>			
<i>In rank order by Backcountry Lodge Guests</i>			
Break from day-to-day environment	71.8%	66.5%	66.8%
Relax/relieve stress	70.6%	65.0%	65.4%
Enrich relationship with partner/children	61.3%	54.5%	52.8%
Create lasting memories	54.7%	55.6%	52.3%
No fixed schedule	51.3%	42.8%	47.8%
See/do something new/different	50.9%	49.3%	44.0%
Keep family ties alive	45.9%	43.6%	43.5%
Enrich perspectives on life	26.6%	31.9%	27.7%
Knowledge of history, cultures, places	25.3%	27.7%	24.3%
Stimulate mind/intellectual challenge	20.6%	19.3%	17.4%
Physical challenge	20.0%	18.1%	15.7%
Renew personal connections (non-family)	19.5%	20.3%	18.9%
Solitude and isolation	15.6%	8.9%	9.3%
Stories to share	11.9%	12.4%	12.9%
To be pampered	10.4%	9.9%	13.3%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

C. Incidence of Summer/Winter Trips

Almost all Backcountry Lodge Guests say that they have taken an overnight pleasure trip during the summer months (94.6%), this is higher than the Canadian travelling public as a whole (86.4%), and those with recent travel to British Columbia (89.7% (see Table 22).

More Lodge Guests take winter trips (77.2%) than the Canadian travelling public as a whole (64%), and those with recent travel to British Columbia (70.4%).

TABLE 22: INCIDENCE OF SUMMER/ WINTER PLEASURE TRIPS	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
Took Overnight Pleasure Trip in Past 2 Years			
In . . .			
Summer	94.6%	89.7%	86.4%
Winter	77.2%	70.4%	64.0%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian 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 Backcountry Lodge Guests (37.2%) (see Table 23). Close to 3-in-10 claim to have memberships in sports club (27.7%) and close to 1-in-4 are members of a frequent flyer program (24.6%)

Compared to the Canadian travelling public as a whole and recent visitors to British Columbia, Lodge Guests memberships are higher for community service clubs, nature/environmental clubs and hobby clubs.

TABLE 23: MEMBERSHIPS	Backcountry Lodge	All Canadian Pleasure Tourists	
	Guests	To British Columbia	Any Destination*
	Total	(7,788)	(23,156)
Unweighted base	(661)		
Weighted, Projected	578,207	6,002,103	19,946,295
<i>In rank order by Backcountry Lodge Guests</i>			
Auto club	37.2%	46.5%	38.3%
Sports club	27.7%	28.9%	23.5%
Frequent flyer program	24.6%	38.3%	25.7%
Community service club	15.3%	11.2%	10.7%
Hotel/car rental loyalty program	13.2%	14.0%	8.8%
Nature/environmental club	10.3%	4.6%	3.5%
Hobby club	7.5%	5.4%	4.6%
Book/reading club	5.2%	5.4%	4.9%
Travel club	1.5%	2.9%	2.1%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian 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

Nearly three-fifths of Canadian Backcountry Lodge Guests have taken a camping trip in the past two years (57.1%). Of these Lodge Guests that camp, they use a *tent* most often for shelter on recent camping trips (37.5%) to a much greater extent than they rely on a *motor home or RV* for shelter (5.0%).

Use of tents among Lodge Guests (37.5%) who go camping, is significantly higher than is the case among typical Canadian tourists who have been camping (25.4%) and those who have recently travelled to British Columbia (28.2%).

	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
Took Camping Trip in Past Two Years	57.1%	46.2%	40.0%
<i>In rank order by Backcountry Lodge Guests</i>			
Tent	37.5%	28.2%	25.4%
Travel trailer/fifth wheel	6.0%	7.1%	6.0%
Motor home or RV	5.0%	5.0%	3.4%
Truck camper or van	4.9%	3.3%	2.0%
Tent trailer	3.8%	2.7%	3.2%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

F. Lodging

A significantly higher percentage of Backcountry Lodge Guests, compared to recent visitors to B.C. and the Canadian travelling public as a whole, stay in wilderness lodges/outposts while on vacation. Over four-fifths of Lodge Guests have stayed at a wilderness lodge (accessible by car) (81.6%), while one-quarter have stayed at a remote/fly-in wilderness lodge (24.7%) and one-tenth have stayed at a remote/fly-in wilderness outpost (9.3%). Compared to Canadian pleasure travellers, Lodge Guests are more than thirty four times as likely to stay in a wilderness lodge (by car) or a remote/fly-in wilderness lodge and they are nearly thirty times as likely to stay at a remote/fly-in wilderness outpost.

More Lodge Guests stay at a lakeside/riverside resort (48.0%) than a seaside resort (29.9%), ski resort or mountain resort (22.3%). Lodge guests are nearly five times more likely to stay at a lakeside/riverside resort than are Canadian pleasure travellers.

Campgrounds are also a popular form of accommodation for Lodge guests while on vacation. Over two-fifths of Lodge Guests have stayed at a public campground (39.8%), while 3-in-10 have camped in a private campground (29.8%) and 1-in-4 in a wilderness setting (23.6%).

Use of lodging among Backcountry Lodge Guests is higher than is the case among typical Canadian tourists and those who have recently travelled to British Columbia (with the exception of ski/mountain resort which is lower than recent visitors to B.C.).

TABLE 25: LODGING USED WHILE ON AN OVERNIGHT PLEASURE TRIP IN PAST TWO YEARS	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
<i>In rank order by any participation within each subgroup (Lodge Guests)</i>			
Used Any Lodging	100%	73.4%	63.8%
Wilderness/remote lodge			
Wilderness Lodge By Car	81.6%	5.6%	5.5%
Remote/Fly-In Wilderness Lodge	24.7%	2.7%	1.6%
Remote/Fly-In Wilderness Outpost	9.3%	1.0%	0.6%
Resort/Spa			
Lakeside/riverside resort	48.0%	26.6%	22.1%
Seaside Resort	29.9%	26.5%	20.3%
Ski resort or mountain resort	22.3%	23.8%	13.6%
Health Spa	14.2%	6.9%	5.8%
Camping			
Public campground in national/provincial/state park	39.8%	32.8%	25.8%
Private Campground	29.8%	22.9%	18.4%
Campsite in wilderness setting	23.6%	12.1%	8.4%
Motorhome/RV while touring (not camping)	9.0%	7.0%	4.5%
Farm or guest ranch	5.7%	4.5%	2.9%
Houseboat	2.7%	2.5%	1.4%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

G. Recreation Ownership

More Backcountry Lodge Guests have regular access to **cottages and/or cabins** (46.7%) than do recent visitors to British Columbia (32.1%) and the Canadian travelling public as a whole (32.8%). Lodge Guests' access to cottages and/or cabins in their home province (41.6%) is significantly higher than recent visitors to British Columbia (25.0%) and the Canadian travelling public as a whole (27.9%).

Nearly 3-in-10 Backcountry Lodge Guests own motor boats (28.6%) and canoes or kayaks (27.4%), whilst 1-in-4 own All-terrain vehicles (ATV's) (23.3%) and nearly 1-in-5 own snowmobiles (16.8%), ownership of these types of equipment is appreciably higher among Lodge Guests than it is among recent visitors to British Columbia and the Canadian travelling public as a whole. This is evidence of their preference for staying at wilderness lodges/outposts and riverside or lakeside resorts.

TABLE 25: RECREATION OWNERSHIP	Backcountry Lodge Guests	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(661)	(7,788)	(23,156)
Weighted, Projected	578,207	6,002,103	19,946,295
<i>In rank order by Backcountry Lodge Guests</i>			
Cottage/Cabin			
Cottage/cabin regular access	46.7%	32.1%	32.8%
Cottage/cabin in home province	41.6%	25.0%	27.9%
Cottage/cabin other province	7.1%	8.1%	4.8%
Cottage/cabin outside Canada	3.1%	3.4%	3.1%
Motor boat	28.6%	17.2%	17.0%
Canoe/kayak	27.4%	17.3%	15.4%
All-terrain vehicle (ATV)	23.3%	11.3%	12.9%
Motor home, camper, RV	17.1%	19.8%	15.3%
Snowmobile	16.8%	7.3%	10.0%
Sailboat	3.4%	4.4%	3.1%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian 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 ³⁰	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

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

The Canadian survey consisted of a telephone and a mail back survey:

- The household response rate to the telephone survey was 65.4%.
- Among those who qualified to receive the paper questionnaire, the response rate was 53.5%.
- The Canadian database consists of 53,150 completed records from the telephone survey and 24,692 completed paper questionnaires.
- The data has been weighted to project the results to the Canadian population.

Tourism British Columbia used the TAMS Canadian data files provided by TAMS partners. As such, the organisation takes no responsibility for the quality of the data or the accuracy of the weighting and projection processes.

³⁰ 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

Name	Main Activities on At Least One Overnight Trip in Past 2 Years
	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
Day Hikes	Hiking – same day excursion while on a trip of one or more nights
Backpacking - Overnight	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 travelling or touring (not a camping trip)
Camping/Tents or RVs	As above, excluding “A motor home or RV while travelling 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 travelling 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
Non-Campers	NOT Camping – Tents (16C) and NOT Camping – RV (16D)

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

TABLE A1: MAJOR ACTIVITY GROUPS – MAIN & ANY	Overnight Trip Activities - Canadian Pleasure Tourists			
	To British Columbia		To Any Destination*	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(7,788)	(7,788)	(23,156)	(23,156)
Weighted, Projected	6,002,103	6,002,103	19,946,295	19,946,295
Outdoor Land Based Activities	33.7%	76.7%	29.4%	66.9%
Outdoor Water Based Activities	34.2%	70.8%	33.3%	65.3%
Accommodation Stayed at	30.8%	73.4%	28.3%	63.8%
Outdoor Winter Activities	19.9%	34.8%	16.8%	29.7%
Performing Arts	16.6%	47.7%	17.6%	44.3%
Festivals & Events	15.3%	49.7%	15.8%	44.1%
Theme/Amusement Parks/Movies	14.5%	54.5%	15.4%	46.7%
Shopping/Dining/Food Related	13.0%	89.2%	16.0%	83.6%
Exhibits/Historic Sites/Museums	17.4%	68.2%	17.4%	58.5%
Spectator Sports	15.3%	33.8%	13.4%	27.5%
Team Sports/Tournaments/Games	9.0%	23.5%	8.8%	21.8%
Aboriginal Experiences	3.7%	17.5%	2.8%	11.3%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. *To British Columbia* is the subset of *All Canadian Pleasure Tourists* who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

TABLE A2: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN & ANY**	Overnight Trip Activities - Canadian Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(7,788)	(7,788)	(23,156)	(23,156)
Weighted, Projected	6,002,103	6,002,103	19,946,295	19,946,295
<i>In rank order by Main Reason – To British Columbia</i>				
Sunbathing or sitting on a beach	18.0%	45.1%	17.5%	40.2%
Camping - Public campground	13.2%	32.8%	11.6%	25.8%
Nature park	12.5%	38.8%	11.5%	29.9%
Swimming in lakes	9.3%	40.4%	8.8%	34.5%
Fishing - Fresh water	8.6%	19.6%	10.1%	20.5%
Seaside Resort	8.3%	26.5%	7.2%	20.3%
Lakeside/Riverside Resort	8.1%	26.6%	7.4%	22.1%
Camping - Private campground	7.3%	22.9%	6.5%	18.4%
Swimming in oceans	6.8%	33.0%	8.4%	28.2%
Well known natural wonders	6.8%	31.2%	6.3%	23.8%
Hiking - same day excursion	6.5%	33.1%	5.3%	23.8%
Motor Boating	4.1%	20.6%	3.9%	17.9%
Wilderness Lodge by Car	1.6%	5.6%	2.3%	5.5%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. **Activities shown here are those that are named by at least 1-in-3 Backcountry Lodge Guests as ones they participated in (any) on a recent overnight trip. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. *To British Columbia* is the subset of *All Canadian Pleasure Tourists* who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

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

	Overnight Trip Activities - Canadian Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(7,788)	(7,788)	(23,156)	(23,156)
Weighted, Projected	6,002,103	6,002,103	19,946,295	19,946,295
<i>In rank order by main reason within each subgroup (To British Columbia)</i>				
Cultural & Heritage				
Any Performing Arts	16.6%	47.7%	17.6%	44.3%
Festival & Events	15.3%	49.7%	15.8%	44.1%
Strolling around a city to see architecture	8.5%	50.0%	8.2%	40.5%
Historic sites - well known	6.7%	38.6%	6.2%	29.7%
Historic sites - other	4.5%	29.6%	4.3%	24.3%
Hands-on Learning Activities	4.2%	16.9%	3.7%	13.3%
Sports				
Spectator Sports (Any)	15.3%	33.8%	13.4%	27.5%
Entertainment				
Amusement Park	8.6%	23.7%	8.6%	21.3%
Casino	4.9%	26.9%	5.9%	25.6%
Zoos	3.5%	18.7%	4.3%	16.6%
Movies/cinema	3.2%	33.9%	3.7%	27.9%
Shopping				
Clothing, shoes, jewellery	5.5%	63.7%	6.9%	57.0%
Bookstores or music stores	2.9%	51.7%	3.4%	41.4%
Local arts & crafts studios	2.8%	47.3%	3.1%	37.5%
Antiques	1.6%	28.3%	2.1%	23.5%
Food & Dining				
Dining – restaurants offering local ingredients and recipes	4.2%	65.1%	5.5%	57.1%
Dining - other high-end (not with international reputation)	2.6%	33.8%	2.8%	27.3%
Local outdoor cafes	2.4%	48.6%	2.8%	38.9%

Source: TAMS Canadian Special Tabulations, prepared by Tourism British Columbia. **Activities shown here are those that are named by at least about 1-in-3 Backcountry Lodge Guests as ones they participated in (any) on a recent overnight trip. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. *To British Columbia* is the subset of "All Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.