



RESEARCH & PLANNING

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

Focus on Divers and Snorkellers

December 2008

Prepared for:
Research & Planning
Tourism British Columbia
300-1803 Douglas St.
Box 9830 Stn. Prov. Gov't.
Victoria, BC V8W 9W5
Web: www.tourismbc.com/research
Email: Research@tourismbc.com
Phone: 250-387-1567

Prepared by:
Nicolette Douglas
Nicolette Douglas Consulting
North Vancouver, BC



Acknowledgments

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

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

TAMS was a partnership of the following organizations:

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

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

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

I. Executive Summary

DIVERS AND SNORKELLERS ARE A NICHE MARKET FOR BRITISH COLUMBIA

At over 400,000, Divers and Snorkellers – Canadian adults who take vacations *in order to go scuba diving and/or snorkelling* - are a niche market. They represent 1-in-43 of the 20 million Canadian overnight pleasure travellers to *any destination* and 1-in-29 of the 6 million Canadians who have come to British Columbia for a vacation in the past two years or so (2004 and 2005).

MOST MEMBERS OF THE MARKET SECTOR ARE SNORKELLERS RATHER THAN DIVERS.

Consistent with those who engage in any diving or snorkelling, many more members of the market sector that take trips in order to engage in these activities are snorkellers (70%) rather than divers (41%) in seas or oceans.

BRITISH COLUMBIA ATTRACTS DIVERS AND SNORKELLERS AT A HIGHER THAN AVERAGE RATE.

While a small niche market, Divers and Snorkellers are more likely to have travelled to British Columbia recently as would be expected given their share of the total Canadian pleasure travel market. At approximately 202,907, this sector represents about 3% of the 6 million Canadian adults with pleasure travel experiences in British Columbia during 2004 or 2005.

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

Divers and Snorkellers live in every province but are concentrated in Central Canada and to a lesser degree in the West.

Participating in diving and snorkelling seems to be particularly popular among pleasure tourists who reside in the larger cities in Central Canada, such as Toronto and **Montreal**. **Vancouver** has the highest percentage of Divers and Snorkellers in the West. In contrast, Divers and Snorkellers are less likely to live in the Maritimes and the Prairie Provinces.

Regional marketing efforts to attract Divers and Snorkellers from Central Canada may be challenging, particularly in light of increased airfares, as these tourists are concentrated in Toronto and Montreal.

DIVERS AND SNORKELLERS SPAN ALL AGE CATEGORIES BUT TEND TO BE IN THEIR MID-THIRTIES TO MID-FIFTIES.

At over 6-in-10 Divers and 5-in-10 Snorkellers, men may predominate, but close to 4-in-10 Divers and Snorkellers are women. All age groups are represented, but they tend to be concentrated in the middle of the age spectrum and once a traveller reaches 65 years of age, he or she is unlikely to seek diving or snorkelling experiences.

DIVERS AND SNORKELLERS ARE AFFLUENT AND EDUCATED.

Tourists in these niche markets tend to be more **highly educated** and to be more **affluent** than are typical Canadian pleasure tourists. 46% of Divers have a **university degree**, and 35% of Snorkellers are university educated. Over 3-in-10 report incomes in the \$60,000 to under \$100,000 bracket and close to 4-in-10 fall within the more affluent \$100,000+ bracket.

ONTARIO AND QUEBEC ARE THE MAIN COMPETITORS FOR THESE TRAVELLERS.

British Columbia is especially successful in attracting Divers (50%) and Snorkellers (44%) vis à vis the general travelling public in Canada (30%). However, **Ontario** (62%) and **Quebec** (51%) - are the main provincial competitors for Canadian Divers, and Ontario (56%) is the main provincial competitor for Snorkellers.

The **United States** clearly leads the International market (Divers 67%; Snorkellers 66%) but other foreign competitive destinations for Divers and Snorkellers include the *Caribbean, Mexico* and *Europe*. Divers and Snorkellers are more likely than *typical* tourists to British Columbia and any destination, to travel to other countries and regions.

A SAFE DESTINATION WITH LOTS FOR ADULTS TO SEE AND DO ARE TOP PRIORITIES FOR DIVERS AND SNORKELLERS.

Most Divers and Snorkellers start a trip planning process with a *destination* in mind followed by on the **activities** they want to enjoy while on their trip and on the **type of vacation experience** they wish to have.

For **Divers** the destination should have *many things for adults to see and do*, be *safe*, pose *no health concerns*, have *destination information available on the internet* and offer *mid-range accommodation*.

For Snorkellers the destination should be *safe*, pose *no health concerns*, have *many things for adults to see and do*, offer *mid-range accommodation* and have *destination information available on the internet*.

DIVERS AND SNORKELLERS ARE MULTI-DIMENSIONAL TRAVELLERS BUT TEND TO BE OUTDOOR TOURISTS.

As demonstrated by their representation in other activity-based tourism sectors, Divers and Snorkellers are multi-dimensional tourists. Over 4-in-10 Divers are also **Alpine Skiers**, 3-in-10 are **Campers/RVers**, **Anglers** and/or **travellers on a self-guided tour** and 1-in-4 are **Hikers**. Whereas 3-in-10 Snorkellers are also **travellers on a self-guided tour**, **Alpine Skiers**, **Campers/RVers** and/or **Anglers** and 1-in-4 are **History/Heritage Tourists** and/or **Hikers**.

In addition to taking trips to go diving and/or snorkelling over 1-in-2 of these Canadians Divers and Snorkellers take trips motivated by engaging in at least one **land-based outdoor activity** and staying in **accommodation**. Whilst 1-in-2 Divers are motivated by participating in **outdoor winter activities**, 2-in-5 Snorkellers are interested in these activities.

At the individual level, many outdoor experiences are popular among Divers and Snorkellers. As their predisposition to snorkel, scuba dive and go to sun/sea destinations might suggest, they are especially interested in **water based travel** experiences: Over 2-in-5 **Divers** enjoy sunbathing or sitting on a beach, over 1-in-4 like swimming in oceans and fishing, especially in fresh water, about 1-in-5 enjoy swimming in lakes and kayaking/canoeing, especially in freshwater, while over 1-in-10 like motor boating. Over 3-in-5 **Snorkellers** enjoy sunbathing or sitting on a beach, over 1-in-2 like swimming in oceans, over 3-in-10 enjoy swimming in lakes, 1-in-4 like fishing, especially in fresh water, while over 1-in-10 like motor boating and kayaking/canoeing, especially in freshwater.

Land-based activities are also popular motivations for recent overnight pleasure trips for **Divers**, over 2-in-5 are motivated by Alpine skiing, over 1-in-4 take trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them, while over 1-in-8 like Hiking as a same day excursion and viewing marine wildlife and land based animals. Over 1-in-4 **Snorkellers** take trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them and go alpine skiing, while over 1-in-7 like Hiking as a same day excursion and viewing marine wildlife and land based animals.

DIVERS AND SNORKELLERS ARE NOT ESPECIALLY DRIVEN TO TAKE CULTURAL, CULINARY OR SHOPPING TRIPS.

By and large, Divers and Snorkellers 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 Divers and Snorkellers, attracting over 1-in-4 of these tourists.

Divers and Snorkellers are more inclined to engage in a variety of cultural and heritage activities as "one-of-many" trip activities than they are to be motivated to take overnight pleasure trips in order to engage in these activities. For example, about one-half have sought out a well-known historic site, or strolled around a city to observe its buildings and architecture on recent pleasure trips but less than one-quarter have taken a trip in order to engage in these activities.

Perhaps because they tend to live in families with children, Snorkellers are particularly apt to take a trip to go to an **amusement park**, whereas, Divers are drawn to rock & roll or popular music concerts. Snorkellers are also motivated by attending **live theatre performances**, visiting **casinos** and **firework displays**; where as Divers are motivated by visiting **aquariums** and **firework displays**.

Similar to many entertainment-oriented activities, dining out is a much more common trip experience (any) than trip drivers (main) for Divers and Snorkellers. Around 1-in-10 Divers and Snorkellers are motivated by dining out at **restaurants offering local ingredients and cuisine** and dining in **high-end restaurants**.

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

THE INTERNET TOPS THE CHART AS A TRIP PLANNING TOOL.

Of the many sources of travel information available to Divers and Snorkellers, the internet tops the chart. Over 7-in-10 Divers and 8-in-10 Snorkellers rely on the **internet** for travel information, 5-in-10 Divers and 6-in-10 Snorkellers rely on **travel agents**, while 5-in-10 (both Divers and Snorkellers) rely on anecdotal information provided by **friends and relatives** and on their own **past experience**. Over 4-in-10 Divers and 3-in-10 Snorkellers rely on **maps** and 3-in-10 (both Divers and Snorkellers) on **Visitor Information Centres**. Over 1-in-4 Divers and Snorkellers rely on **official DMO travel guides** to obtain travel information. 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.

DIVERS AND SNORKELLERS HAVE VERY FAVOURABLE IMPRESSIONS OF BRITISH COLUMBIA.

Canadian Divers and Snorkellers are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel; Divers accord B.C. a rating of 8.8 and Snorkellers an even higher rating of 9.0 on a ten-point scale. Though lower than B.C.'s, moderately favourable ratings are accorded a host of destinations, including **Hawaii, California, Florida, Nova Scotia, Alberta, Prince Edward Island** and **Ontario**.

British Columbia is given the highest rating as an appealing destination for pleasure travel, and less than 10% of Canadian Divers and Snorkellers refrained from rating the province, thus indicating that Canadian travellers are knowledgeable about the destination and its touristic appeal.

DISTANCE AND WATER TEMPERATURE MAY POSE A CHALLENGE FOR ATTRACTING DIVERS AND SNORKELLERS TO BRITISH COLUMBIA.

With their particular constellation of outdoor interests Divers and Snorkellers might seem to be an ideal market for the province. At present, however, the province is attracting only three percent of this market - a rate well below that achieved by destinations that offer warmer waters for underwater exploration and particularly for snorkelling, such as Florida, California, Hawaii, the Caribbean, and Mexico. To attract more Canadian divers and snorkellers, it may be necessary for British Columbia's businesses to target the portion of the larger market that would be challenged by diving in colder waters and to make these potential tourists aware of the unique diving opportunities the province has to offer.

Regional marketing efforts to attract Divers and Snorkellers may be challenging, particularly in light of air access challenges (such as increased airfares and reduced capacity), as these tourists are concentrated in Central Canada.

TABLE OF CONTENTS

I. Executive Summary.....	3
II. Introduction.....	9
A. BACKGROUND AND OBJECTIVES.....	9
B. THE CANADIAN DIVERS AND SNORKELLERS 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.....	17
IV. Divers and Snorkellers Market Profile	21
A. MARKET COMPOSITION.....	21
B. REGIONAL AND DEMOGRAPHIC CHARACTERISTICS	22
1. <i>Place of Residence</i>	22
2. <i>Personal and Household Characteristics</i>	25
3. <i>Household Composition</i>	29
V. Competitive Destinations.....	30
A. WORLDWIDE DESTINATIONS FOR OVERNIGHT PLEASURE TRIPS	30
B. DESTINATIONS: ROLES & RATINGS.....	32
1. <i>Importance of Destination</i>	32
2. <i>Importance of Conditions in Destination Choice</i>	34
3. <i>Appeal of Various Destinations</i>	37
4. <i>Number of Good Reasons to Visit Various Destinations</i>	40
VI. Activities on Overnight Trips.....	42
A. INTRODUCTION.....	42
B. TRIP ACTIVITIES & DRIVERS.....	43
1. <i>Divers and Snorkellers' Cross-Over with Other Trip Activity Sectors</i>	43
2. <i>Major Trip Activity Groups</i>	46
3. <i>Individual Trip Activities: The Outdoors</i>	49
4. <i>Individual Trip Activities: Culture, Entertainment, Dining, Shopping & Sports</i>	52
5. <i>Overnight Cruises & Organized Group Tours</i>	56
VII. Trip Planning.....	58
A. WHO DOES THE PLANNING?.....	58
B. TRAVEL INFORMATION SOURCES & TRAVEL MEDIA	59
C. INTERNET USE FOR TRAVEL INQUIRIES & BOOKINGS	62
VIII. Other Travel-Related Information.....	64
A. USE OF PACKAGE DEALS.....	64
B. BENEFITS SOUGHT FROM PLEASURE TRAVEL	65
C. INCIDENCE OF SUMMER/WINTER TRIPS	68
D. MEMBERSHIPS IN VARIOUS ORGANIZATIONS	69
E. SHELTER USED MOST OFTEN ON CAMPING TRIPS	70
F. LODGING	71
G. RECREATION OWNERSHIP	72
IX. Appendices	73
A. ABOUT THE TRAVEL ACTIVITIES AND MOTIVATION SURVEY (TAMS)	73
B. TRIP ACTIVITY SECTOR DEFINITIONS	74
C. TRIP ACTIVITIES – RECENT B.C. AND ANY DESTINATION PLEASURE TRAVELLERS	76

II. Introduction

A. Background and Objectives

The Travel Activities and Motivation Survey (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 from 2004 to 2005 and provides detailed information on Travellers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

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

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

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.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 **Scuba Divers** and **Snorkellers**, hereafter referred to as Divers and Snorkellers.

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 and cross-country or back country skiing as an overnight touring trip.

B. The Canadian Divers and Snorkellers Report

For purposes of this report, Canadian **Divers and Snorkellers** 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 years⁴ 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

- *Scuba diving in lakes/rivers*
- *Scuba diving in sea/ocean*
- *Snorkelling in lakes or rivers*
- *Snorkelling in sea/ocean*

People who take a trip *in order to* participate in scuba diving or snorkelling are only a fraction of tourists who participate in diving or snorkelling on their vacations. Of the 20.9 million Canadian Travellers, 1% (157,993) went scuba diving in lakes/rivers, 3% (553,464) went scuba diving in the sea/ocean, 2% (488,099) went snorkeling in lakes/rivers and 10% (2,052,088) went snorkeling in the sea/ocean.⁵

These under water enthusiasts – those for whom diving or snorkeling is the main reason for a trip – are the focus of this report because as the “dedicated” or “hard core” market, they represent a crystallization of the interests and characteristics that might attract more casual participants to the activity.

Note to Readers

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

In other words, Canadian Divers and Snorkellers claim to have taken an overnight trip motivated by diving or snorkelling 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, Divers and Snorkellers may or may not have been diving or snorkelling in a particular country, province or state they have visited recently for an overnight pleasure trip.

⁴ 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.

⁵ See *Travel Activities and Motivations of Canadian Residents: An Overview*, Tourism BC, May 2007, pg 16 http://www.tourism.bc.ca/pdf/TAMSCan2006_Overview.pdf

The report provides the following information:

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

III. Overview of 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).⁶ 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 (43%) of the Canadian overnight pleasure travel market, or about 8.6 million tourists, have had *some* experience with British Columbia over the past decade.⁷ They may have been on a vacation or visiting friends and relatives while on their pleasure trip to the province. Of the 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 (2004 and 2005) (30% 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 3-in-10 (30%) of these tourists to the province over a two-year period. The profiles of various activity-based sectors⁸ 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 taken an overnight pleasure trip to/in to British Columbia over the two-year period (6 million).⁹

⁶ Adults are defined as individuals 18 years of age or older.

⁷ 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.

⁸ 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.

⁹ 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 Size¹⁰

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.¹¹ 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 ¹	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
Scuba Divers	187,891	0.9%	93,320	1.6%	178
Snorkellers	319,704	1.6%	139,246	2.3%	144
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 for Tourism British Columbia.

¹⁰ Does not represent all participants in this activity, but instead represents those who were motivated to travel to participate in this activity.

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

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.

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. The province's success in attracting visitors within a sector is evident in the extent to which its index score is greater than 100. Conversely, British Columbia's relative weakness would be evident in the extent to which a score is less than 100.

Based on this index, British Columbia is attracting 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							
<i>At least 20% Duplication</i>							
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 to almost 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 out-door activities, including hiking, camping and Alpine skiing (see Chart B). **River Rafters, Sea Kayakers, Divers/Snorkellers**, and **Golfers**, on the other hand, are not as widely represented in other tourism activity sectors.

IV. Divers and Snorkellers Market Profile

A. Market Composition

The Divers and Snorkellers sector is composed of Canadian pleasure tourists who participated in diving or snorkelling as the *main reason* for an overnight trip in the past two years (2004 and 2005). They represent 1-in-43 of the 20 million Canadian overnight pleasure travellers to *any destination* (2%) and 1-in-29 of the 6 million Canadians who have come to British Columbia for a vacation in the past two years or so (3%).

Those who **snorkel** (70%) dominate this sector, representing over 3-in-5 Divers/Snorkellers. A further 2-in-5 Canadian Divers/Snorkellers claim to have participated in scuba diving (41%).

Table C below illustrates the percentage and total number of Canadian Divers/Snorkellers as well as Canadian Overnight Pleasure Travellers, to any destination and British Columbia, who indicated that their *main trip purpose* was to go diving/snorkelling:¹²

TABLE C: MAIN REASON FOR TAKING OVERNIGHT TRIPS IN 2004-2005	Total Divers/Snorkellers	Total Canadian Pleasure Tourists British Columbia	Total Canadian Pleasure Tourists Any Destination
<i>Unweighted Base</i>	(524)	(7,788)	(23,156)
<i>Weighted, Projected</i>	458,261	6,002,103	19,946,295
Divers/Snorkellers	459,261	202,907	459,261
<i>Percentage</i>	100%	3.4%	2.3%
Scuba Divers	187,891	93,320	187,891
<i>Percentage</i>	40.9%	1.6%	0.9%
Snorkellers	319,704	139,246	319,704
<i>Percentage</i>	69.6%	2.3%	1.6%

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

Readers should bear in mind the prominence of those tourists who **snorkel in the sea or ocean** in the following pages.

¹² Some Divers/Snorkellers have participated in both scuba diving and snorkelling 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 over 400,000, Divers and Snorkellers – Canadian adults who take vacations *in order to go scuba diving and/or snorkelling* - are a niche market. They represent 1-in-43 of the 20 million Canadian overnight pleasure travellers to *any destination* (2%, 459,261) and 1-in-29 of the 6 million Canadians who have come to British Columbia (3%, 202,907) for a vacation in the past two years or so (2004 and 2005).

At over 300,000 **Snorkellers** – Canadian adults who take vacations *in order to go snorkelling (in lakes/rivers and/or sea/ocean)* represent 1-in-63 Canadian overnight pleasure travellers to *any destination* (2%, 319,704) and 1-in-43 of the six million Canadians who have come to British Columbia for a vacation in the past two years or so (2%, 139,246).

While they are also an important market sector **Scuba Divers** – Canadian adults who take vacations *in order to go scuba diving (in lakes/rivers and/or sea/ocean)* – are less prevalent than Snorkellers. At nearly 200,000, Scuba Divers represent 1-in-111 Canadian overnight pleasure travellers to *any destination* (1%, 187,891) and 1-in-63 of the six million Canadians who have come to British Columbia for a vacation in the past two years or so (2%, 93,320).

Table 1 provides the place of residence by city, which emerge as noteworthy for Divers and Snorkellers.

- Divers and Snorkellers live in every province.
- Diving and snorkelling seems to be particularly popular among pleasure tourists who reside in the larger cities, such as **Toronto** (17%), **Montreal** (13%) and **Vancouver** (11%).
- **Toronto** has the highest percentage of Scuba divers (21%) and Snorkellers (14%) in Central Canada; this is followed by **Montreal** (17% Divers; 9% Snorkellers).
- **Montreal** is home to about 1-in-9 adult Canadians (12%) but significantly more Scuba divers (1-in-6, 17%) live in the city.
- **Vancouver** has the highest percentage of Scuba divers (8%) and Snorkellers (11%) in the West.

- In contrast, Divers and Snorkellers are less likely to live in the Maritimes and the Prairie Provinces.

Regional marketing efforts to attract Divers and Snorkellers from Central Canada may be challenging, particularly in light of increased airfares, as these tourists are concentrated in Toronto and Montreal.

TABLE 1: PLACE OF RESIDENCE	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total (176)	Total (401)	To British Columbia (7,788)	Any Destination (23,156)
Unweighted base	187,891	319,704	6,002,103	19,946,295
Weighted, Projected				
Incidence of Scuba Divers	100%	n/a	1.6%	0.9%
Incidence of Snorkellers	n/a	100%	2.3%	1.6%
Maritimes				
Halifax	1.3%	2.0%	0.6%	1.2%
Quebec				
Quebec City	1.0%	1.0%	0.4%	2.3%
Montreal	17.2%	8.6%	4.1%	11.6%
Ontario				
Ottawa	4.5%	3.3%	2.0%	2.9%
Oshawa	0.6%	2.7%	0.5%	1.1%
Toronto	20.6%	14.1%	9.1%	16.6%
Hamilton	0.9%	2.9%	1.3%	2.2%
Kitchener	0.2%	2.4%	0.7%	1.5%
St. Catharines-Niagara	0.6%	1.7%	0.4%	1.1%
London	1.9%	2.5%	0.6%	1.5%
Windsor	0.8%	1.6%	0.3%	1.0%
Manitoba				
Winnipeg	1.1%	0.9%	2.4%	2.1%
Saskatchewan				
Regina	1.0%	0.9%	0.9%	0.6%
Saskatoon	0.3%	0.6%	1.2%	0.8%
Alberta				
Calgary	1.4%	2.5%	9.0%	3.7%
Edmonton	5.1%	5.8%	7.6%	3.4%
British Columbia				
Vancouver	7.6%	11.1%	20.6%	7.7%
Victoria	1.0%	1.2%	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 Divers and Snorkellers, there are slight differences between them.

- Over 3-in-10 **Scuba Divers** are 25 to 34 years of age (32%) and 45 to 54 years of age (31%) While 1-in-10 of them are young adults (18 to 24 years; 10%), 1-in-5 are aged 35 to 44 (22%) and 1-in-23 are 65 years of age or older (4%). Over 4-in-5 are aged between 25 to 54 years (86%) (see Table 2).
- **Snorkellers**, in contrast, are more evenly distributed among the age categories, with over 1-in-5 being 25 to 34 years of age (22%), 35 to 44 years of age (24%) and 45 to 54 years of age (25%). While 1-in-7 of them are young adults (18 to 24 years; 15%) or are 65 years of age or older (15%). Over 2-in-3 are aged between 25 to 54 years (70%).
- Men (62%) are more likely to be **Scuba divers** than are women (38%). There is a higher percentage of younger (18-34 years old) female scuba divers (44%) than male (41%) and there are more male scuba divers 55 years and older (6%) than females (2%).
- Men (53%) are more likely to be **Snorkellers** than are women (47%). There is a higher percentage of younger (18-34 years old) male snorkellers (44%) than female (29%) and there are more female (57%) snorkellers aged 35 to 54 years than male (41%).

TABLE 2: AGE & GENDER	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total (176)	Total (401)	To British Columbia (7,788)	Any Destination (23,156)
Unweighted base				
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
Age				
18 – 24 Years	10.2%	15.0%	12.9%	12.7%
25 – 34 Years	32.3%	21.8%	18.4%	18.8%
35 – 44 Years	22.4%	23.7%	18.7%	20.4%
45 – 54 Years	30.9%	24.8%	21.3%	20.2%
55 – 64 Years	3.4%	10.5%	14.9%	14.4%
65+ Years	0.9%	4.2%	13.9%	13.5%
Gender				
Men				
18 – 34 Years	41.2%	43.5%	32.8%	32.2%
35 – 54 Years	53.2%	41.1%	39.5%	41.0%
55+ Years	5.5%	15.5%	27.7%	26.7%
Women				
18 – 34 Years	44.3%	29.3%	29.8%	30.7%
35 – 54 Years	53.5%	56.9%	40.4%	40.3%
55+ Years	2.2%	13.8%	29.8%	29.0%

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.

Education, Occupation and Income

The diving and snorkelling sectors differ somewhat in terms of education and occupation/work status.

- Specifically, 46% of Divers have a **university degree**, whereas 35% of Snorkellers are university educated.
- Not surprisingly in light of the age differences between the two groups, Snorkellers are more likely to be **retirees** (7%) than Divers (2%) and more Divers work **part-time** (12%) than do Snorkellers (4%).

Despite their differences in education and work status, Divers and Snorkellers are quite similar to one another with respect to **household incomes**. Both groups represent a broad range of incomes. Around 2-in-10 report household incomes under \$60,000 (20% Divers; 21% Snorkellers), while over 3-in-10 report incomes in the \$60,000 to under \$100,000 bracket (31% Divers; 35% Snorkellers) and close to 4-in-10 fall within the more affluent \$100,000+ bracket (38% Divers; 38% Snorkellers).

Tourists in these niche markets tend to be more **highly educated** and to be more **affluent** than are typical Canadian pleasure tourists.

TABLE 3: EDUCATION, OCCUPATION, INCOME	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
Education				
High school diploma or less	21.3%	27.4%	32.6%	36.7%
Some post-secondary	10.3%	10.8%	11.9%	10.9%
Post-secondary diploma or certificate	22.5%	25.8%	19.5%	21.6%
University degree+	46.0%	34.9%	35.4%	30.0%
Occupation/Work Status				
Work 30+ hrs/week as paid employee	54.2%	54.2%	58.3%	47.8%
Work as paid employee but part- time (less than 30 hrs/week)	12.2%	4.4%	6.1%	5.4%
Self-employed/Unpaid worker at a family business	15.5%	17.1%	12.8%	9.9%
Going to school	5.7%	8.6%	6.5%	7.2%
Homemaker	2.3%	5.2%	6.1%	5.5%
Retired	2.2%	7.0%	17.8%	17.4%
Household Income				
Under \$40,000	12.4%	12.3%	17.8%	20.6%
\$40,000 - \$59,999	7.7%	8.4%	13.9%	14.6%
\$60,000 - \$99,999	31.3%	34.5%	27.0%	27.1%
\$100,000+	37.9%	37.5%	29.3%	22.4%

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.

3. Household Composition

About 2-in-3 **Divers** (64%) and 3-in-4 **Snorkellers** (74%) live with a spouse or partner (with or without children) and over 1-in-3 live with a spouse or partner with no children 17 years or younger (Divers 34%; Snorkellers 36%) (see Table 4).

Divers and **Snorkellers** are less likely to live with a spouse /partner and no children 17 years or younger (Divers 34%; Snorkellers 36%) than are typical tourists to British Columbia (39%) or any destination (38%).

A higher proportion of **Snorkellers** live with a spouse/partner and children 17 or under (29%) than do Divers (20%).

Divers (23%) are more likely to live with someone other than a spouse or child, than are Snorkellers (10%) and typical tourists to British Columbia (13%) and any destination (14%).

CHARACTERISTICS	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
			To British Columbia	Any Destination
	Total	Total		
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
"Do you live:"				
Alone	8.2%	8.6%	10.3%	10.7%
With spouse/partner & no children 17 years or younger	33.7%	35.6%	38.6%	38.0%
With spouse/partner & children 17 years or under	20.4%	28.9%	23.5%	22.0%
With spouse/partner & children 18 years & over but none under 17 years	9.7%	9.0%	7.9%	7.8%
With children and no spouse	5.5%	3.4%	5.1%	6.7%
Someone other than spouse/child	22.5%	10.3%	13.4%	13.6%

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.

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 Divers and Snorkellers indicated that they have taken recent vacations within Canada and less than 1-in-9 claim to have travelled *only* within Canada (Divers 15%; Snorkellers 11%); this is significantly lower than for Canadian travellers to B.C. (28%), and Canadian pleasure travellers to any destination (36%) (see Table 5). Over 2-in-3 have been to the United States on a recent overnight pleasure trip (Divers 67%; Snorkellers 66%) suggesting that the U.S.A. is a particularly attractive destination for these under water enthusiasts. This is higher than Canadian tourists to B.C. (60%) and Canadian pleasure tourists as a whole that have been to any destination recently (51%).

British Columbia is especially successful in attracting Divers (50%) and Snorkellers (44%) vis à vis the general travelling public in Canada (30%). **British Columbia** is an attractive destination for these under water enthusiasts.

Ontario (62%) and **Quebec** (51%) - are the main provincial competitors for Canadian **Divers**, and **Ontario** (56%) is the main provincial competitor for **Snorkellers**. There are significantly more **Divers** who have travelled to **Quebec** (51%) and **Ontario** (62%) than have Canadian pleasure visitors to B.C. (Quebec 24%; Ontario 40%) and Canadian travellers as a whole to any destination (Quebec 39%; Ontario 53%).

The **United States** clearly leads the International market (Divers 67%; Snorkellers 66%) but other foreign competitive destinations for Divers and Snorkellers include the *Caribbean* (Divers 34%; Snorkellers 43%), *Mexico* (Divers 31%; Snorkellers 38%) and *Europe* (Divers 28%; Snorkellers 18%). Divers and Snorkellers are more likely than *typical* tourists to British Columbia and any destination, to travel to other countries and regions.

Note to Readers

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

In other words, Canadian Divers and Snorkellers claim to have taken an overnight trip motivated by going diving and/or snorkelling 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, Divers and Snorkellers may or may not have gone diving or snorkelling in a particular country, province or state they have visited recently for an overnight pleasure trip.

TABLE 5: COMPETITIVE DESTINATIONS WORLDWIDE*	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
			To British Columbia	Any Destination
	Total	Total		
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
Canada				
Newfoundland & Labrador	5.5%	3.9%	3.4%	4.3%
Prince Edward Island	6.5%	8.9%	6.3%	7.2%
Nova Scotia	10.9%	15.1%	10.8%	11.7%
New Brunswick	16.2%	15.5%	9.0%	12.6%
Quebec	50.5%	37.0%	23.8%	38.5%
Ontario	62.3%	55.9%	40.2%	52.8%
Manitoba	11.3%	10.3%	16.0%	9.1%
Saskatchewan	12.2%	15.1%	23.2%	11.2%
Alberta	45.3%	40.2%	57.2%	25.4%
British Columbia	49.7%	43.6%	100%	30.1%
Yukon	0.9%	2.5%	3.1%	1.0%
Northwest Territories	0.2%	0.8%	1.8%	0.7%
Nunavut	0.9%	0.6%	0.5%	0.3%
United States	67.2%	66.2%	59.8%	50.6%
Other Countries/Regions				
Mexico	30.6%	38.2%	18.6%	12.0%
South/Central America	18.4%	13.9%	5.6%	4.8%
Caribbean	34.1%	43.4%	14.2%	15.4%
Europe (Incl. the UK and Russia)	28.1%	18.3%	18.7%	15.6%
Asia	17.4%	6.4%	8.7%	5.5%
Australia/New Zealand/Africa	8.4%	7.3%	4.3%	2.9%
Destination patterns				
Only Canada	14.6%	11.0%	28.1%	35.6%
Canada & U.S.A. only	29.5%	26.2%	54.5%	61.2%
Canada & Other Countries (Not USA)	32.8%	33.8%	40.2%	49.4%
Canada & Mexico only	20.1%	15.3%	30.7%	37.3%
U.S.A. only	0%	0%	0.0%	2.2%

Source: Canadian TAMS Special Tabulations, prepared for 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 Divers (51%) and Snorkellers (47%) the first consideration in planning their most recent **summer** trip was **destination** (see Table 8). For **Divers** over 1-in-7 begins with the **type of vacation experience** they wish to have (14%) and 1-in-6 on the **activities** they wish to participate in (17%). This level of **activity-driven** planning is significantly higher than is the case among typical Canadian tourists to British Columbia (10%) or in the Canadian travel market as a whole (11%). While for **Snorkellers** 1-in-6 begins with the **type of vacation experience** they wish to have (16%) and 1-in-8 on the **activities** they wish to participate in (12%).

Like summer trips, when planning a **winter** trip Canadian **Snorkellers** first consideration was the **destination** (38%), followed by the **activities** they wish to participate in (21%). However, for **Divers** over 1-in-3 start with the **activities** they wish to participate in (36%) followed by the destination (30%). This level of **activity-driven** planning is substantially higher than is the case among typical Canadian tourists to British Columbia (12%) or in the Canadian travel market as a whole (9%). A lower proportion of these tourists start their trip planning process with a focus on the **type of vacation experience** they wish to have (Divers 7%; Snorkellers 11%).

Destination is important to both Divers and Snorkellers; with over 2-in-3 Divers (70%) and close to 3-in-4 Snorkellers (74%) claiming that it is *extremely* or *very important* to them, this is higher than Canadians with recent pleasure travel experience in British Columbia (63%) or travellers as a whole (62%).

TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
First Consideration for Most Recent Summer Trip				
Start with destination	51.4%	47.3%	43.2%	37.8%
Start with activities	16.5%	11.8%	9.6%	10.6%
Start with type of vacation experience	13.9%	16.0%	18.4%	18.5%
Look for package deal (with out destination)	2.1%	3.9%	1.1%	1.1%
First Consideration for Most Recent Winter Trip				
Start with destination	29.8%	38.0%	32.5%	28.4%
Start with activities	35.8%	21.0%	11.6%	9.1%
Start with type of vacation experience	7.3%	10.8%	12.8%	11.4%
Look for package deal (with out destination)	0.4%	3.5%	1.4%	1.9%
Importance of Destination				
Extremely/Very Important	69.6%	73.6%	63.0%	62.1%
Extremely important	37.4%	26.3%	23.9%	23.1%
Very important	32.2%	47.3%	39.1%	39.0%
Average*	2.9	2.9	2.8	2.8

Source: Canadian TAMS Special Tabulations prepared for 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.¹³

Divers and Snorkellers 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, Snorkellers put *feeling safe* (62%) at the top of their list, however, Divers put having *many things for adults to see and do* (49%) at the top of their list, followed by *feeling safe* (48%) (see Table 9). Over 4-in-10 Divers (40%) and 5-in-10 Snorkellers (51%) place high importance on a destination that poses *no health concerns*, while over 3-in-10 require the availability of *destination information on the internet* (Divers 32%; Snorkellers 32%), and a destination that offers *mid-range lodging* (Divers 32%; Snorkellers 34%).

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

- **Scuba divers** are more apt to take into account the *culture being very different than their own* (26%), *camping* (16%) and *convenient access by train/bus* (16%) than are Snorkellers (different culture 14%; camping 12%; train/bus 11%), visitors to B.C. (different culture 9%; camping 14%; train/bus 11%), or Canadian travellers as a whole (different culture 9%; camping 13%; train/bus 13%).
- **Scuba divers** are significantly less likely to be motivated by having *great shopping* available (3%) than are Snorkellers (11%), visitors to B.C. (11%) or Canadian travellers as a whole (12%).
- Although 1-in-5 **Scuba divers** indicated that *direct access by air* (22%) is an important consideration, this is lower than for visitors to B.C. (32%) or Canadian travellers as a whole (29%). 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.).
- **Snorkellers** are more apt to take into account the *convenient access by car* (31%) and *lots for children to see and do* (17%) than are divers (24% and 10% respectively).

¹³ “Highly important”, “Somewhat important”, and “Of no importance”.

Summary: Considerations Deemed *Highly Important* By At Least 1-in-4 Scuba Divers/Snorkellers¹⁴

	<u>Canadian Pleasure Tourists</u>			
	<u>Scuba Divers</u>	<u>Snorkellers</u>	<u>To British Columbia</u>	<u>Any Destination</u>
Lots for adults to see/do	49.3%	50.1%	39.2%	38.0%
Feeling safe	47.8%	62.2%	65.1%	65.9%
No health concerns	40.1%	51.0%	46.8%	49.9%
Information available on the internet	32.1%	32.2%	25.7%	24.6%
Mid Range accommodation	32.0%	33.7%	29.6%	29.6%
Very different culture than own	26.2%	14.3%	9.1%	8.9%
Convenient Access by Car	23.5%	31.2%	36.2%	43.3%
Direct Access by Air	22.4%	33.7%	31.6%	28.9%

Conditions rated as not being of high importance for Divers and Snorkellers are being familiar with the culture and language, the availability of luxury accommodation having great shopping, having friends and relatives there, and being disabled-person friendly.

¹⁴ See Table 9 for full array of considerations deemed “highly important” and “of no importance”.

TABLE 9: CONDITIONS FOR SELECTING A DESTINATION	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
			To British Columbia	Any Destination*
	Total	Total		
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
<i>Bold rows are proportion stating "Highly Important" In rank order by Scuba Divers</i>				
Lots for adults to see/do	49.3%	50.1%	39.2%	38.0%
Of no importance	3.2%	4.8%	7.2%	7.3%
Feeling safe	47.8%	62.2%	65.1%	65.9%
Of no importance	5.8%	5.7%	3.1%	3.5%
No health concerns	40.1%	51.0%	46.8%	49.9%
Of no importance	9.6%	11.9%	8.8%	8.2%
Information available on internet	32.1%	32.2%	25.7%	24.6%
Of no importance	18.6%	16.3%	24.7%	27.1%
Mid-range accommodation	32.0%	33.7%	29.6%	29.6%
Of no importance	12.0%	8.8%	12.6%	12.8%
Very different culture than own	26.2%	14.3%	9.1%	8.9%
Of no importance	30.1%	23.9%	39.6%	39.7%
Convenient access by car	23.5%	31.2%	36.2%	43.3%
Of no importance	24.5%	17.1%	13.6%	11.5%
Direct access by air	22.4%	33.7%	31.6%	28.9%
Of no importance	19.8%	15.4%	17.0%	21.7%
Budget accommodation	19.2%	16.2%	21.5%	21.7%
Of no importance	22.9%	26.7%	23.4%	23.8%
Low cost packages available	17.1%	19.3%	20.9%	22.8%
Of no importance	34.5%	27.6%	27.3%	23.1%
Camping	16.1%	11.9%	13.9%	12.8%
Of no importance	38.0%	46.5%	48.7%	50.6%
Convenient access by train/bus	15.5%	10.9%	11.4%	13.1%
Of no importance	35.8%	37.2%	40.3%	39.3%
Lots for children to see/do	10.4%	16.6%	13.7%	16.4%
Of no importance	64.7%	64.0%	62.0%	56.5%
Familiar with culture & language	6.8%	6.9%	10.8%	13.6%
Of no importance	38.2%	36.6%	28.6%	26.9%
Luxury accommodation	6.4%	11.6%	5.7%	6.8%
Of no importance	59.0%	46.2%	57.5%	54.5%
Great shopping	3.3%	11.0%	11.1%	12.3%
Of no importance	61.0%	44.6%	45.0%	43.2%
Have friends or relatives there	2.0%	3.7%	10.2%	11.1%
Of no importance	73.9%	74.5%	59.6%	59.0%
Disabled-person-friendly	0.6%	2.7%	3.6%	5.6%
Of no importance	84.7%	80.0%	79.6%	73.8%

Source: Canadian TAMS Special Tabulations prepared for 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 Divers and Snorkellers are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel; Divers accord B.C. a rating of 8.8 and Snorkellers an even higher rating of 9.0 on a ten-point scale (see Table 10).¹⁵ Though lower than B.C.'s, moderately favourable ratings are accorded a host of destinations, including **Hawaii** (Divers 8.9; Snorkellers 8.6), **California** (Divers 7.9; Snorkellers 7.8), **Florida** (Divers 7.0; Snorkellers 7.1), **Nova Scotia** (Divers 6.9; Snorkellers 7.2), **Alberta** (Divers 6.8; Snorkellers 7.2), **Prince Edward Island** (Divers 6.8; Snorkellers 7.1) and **Ontario** (Divers 6.4; Snorkellers 7.1).

Summary: Most Appealing Destinations among Divers and Snorkellers (with an average score of at least 7.0)¹⁶

	<u>Canadian Pleasure Tourists</u>			
	<u>Scuba</u>		<u>To British</u>	
	<u>Divers</u>	<u>Snorkellers</u>	<u>Columbia</u>	<u>Total</u>
British Columbia	8.8	9.0	9.0	8.8
Hawaii	8.9	8.6	8.1	8.3
California	7.9	7.8	7.4	8.4
Florida	7.0	7.1	6.5	8.7
Nova Scotia	6.9	7.2	7.2	8.4
Alberta	6.8	7.2	7.3	8.5
Prince Edward Island	6.8	7.1	7.2	8.3
Ontario	6.4	7.1	6.6	9.2

British Columbia is given the highest rating as an appealing destination for pleasure travel, and less than 10% of Canadian Divers and Snorkellers refrained from rating the province, thus indicating that Canadian travellers are knowledgeable about the destination and its touristic appeal.

The impact of direct experience 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).

¹⁵ 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.

¹⁶ See Table 10 for full array of average ratings and proportion unable/unwilling to rate each destination.

Among *all Divers and Snorkellers* who have been to British Columbia in the past two years or so, the province achieves a rating of 8.9, surpassing Hawaii (8.7).¹⁷ The challenge, of course, is getting these under water enthusiasts back to the province!

¹⁷ Includes Divers and Snorkellers (NET).

TABLE 10: APPEAL OF
VARIOUS DESTINATIONS

	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination*
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
<i>Bold rows are average ratings**</i>				
British Columbia	8.8	9.0	9.0	8.8
No rating provided	7.5%	6.7%	2.1%	12.4%
Newfoundland & Labrador	6.1	6.6	6.8	7.9
No rating provided	21.6%	23.3%	19.5%	21.5%
Nova Scotia	6.9	7.2	7.2	8.4
No rating provided	18.5%	16.1%	14.5%	16.3%
New Brunswick	6.2	6.8	6.5	8.3
No rating provided	19.2%	14.4%	16.8%	16.9%
Prince Edward Island	6.8	7.1	7.2	8.3
No rating provided	19.2%	15.8%	15.5%	16.6%
Quebec	6.7	6.7	6.7	9.0
No rating provided	8.5%	9.9%	11.1%	10.2%
Ontario	6.4	7.1	6.6	9.2
No rating provided	5.4%	8.8%	8.0%	8.0%
Manitoba	4.2	4.9	4.8	7.9
No rating provided	22.2%	16.7%	14.6%	21.1%
Saskatchewan	3.9	4.5	4.8	7.9
No rating provided	22.6%	16.0%	13.4%	20.7%
Alberta	6.8	7.2	7.3	8.5
No rating provided	11.8%	8.1%	6.8%	15.3%
Yukon	6.0	6.5	6.4	7.5
No rating provided	25.0%	21.0%	19.5%	24.9%
Northwest Territories	5.3	5.8	5.8	7.4
No rating provided	24.0%	22.2%	21.1%	25.7%
Nunavut	5.1	5.1	5.0	7.2
No rating provided	26.2%	23.7%	24.3%	28.1%
New York State	6.5	6.4	6.2	8.4
No rating provided	11.3%	13.2%	14.1%	16.0%
Colorado	6.3	6.6	6.1	7.6
No rating provided	18.5%	20.5%	19.9%	24.5%
Florida	7.0	7.1	6.5	8.7
No rating provided	11.4%	11.6%	12.2%	13.5%
California	7.9	7.8	7.4	8.4
No rating provided	13.0%	13.3%	10.5%	16.0%
Hawaii	8.9	8.6	8.1	8.3
No rating provided	17.2%	14.4%	12.5%	17.1
Arizona	6.2	6.9	6.5	7.8
No rating provided	17.2%	18.7%	15.9%	21.1%

Source: Canadian TAMS Special Tabulations prepared for 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 Divers' and Snorkellers' lists for having *many good reasons* to visit on a pleasure trip (see Table 11).¹⁸ Specifically, **British Columbia** tops the list with over 8-in-10 Divers (80%) and Snorkellers (81%) 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 Divers (80%) and Snorkellers (81%) *many good reasons* to visit. Other destinations with many reasons to visit, according to Divers and Snorkellers are Hawaii, California, Quebec, Alberta, Florida, Nova Scotia and Ontario.

Significantly more Divers and Snorkellers, than Canadian pleasure tourists to B.C. and any destination, state that there are many good reasons to visit the Northwest Territories, Nunavut and the Yukon.

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

<u>Scuba Divers</u>		<u>Snorkellers</u>		<u>Canadian Pleasure Tourists</u>			
				<u>To British Columbia</u>		<u>Total</u>	
B.C.	80%	B.C.	81%	B.C.	83%	B.C.	65%
Hawaii	68%	Hawaii	67%	Hawaii	56%	Hawaii	55%
California	54%	California	56%	California	50%		
Quebec	51%						

Among *all Divers and Snorkellers* who have recently travelled to British Columbia, over 8-in-10 say that there are many good reasons to go (81%).¹⁹ 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*.

¹⁹ Includes Divers and Snorkellers (NET).

TABLE 11: NUMBER OF REASONS TO VISIT VARIOUS DESTINATIONS	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination*
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
<i>% stating "MANY" good reasons to visit In Rank order by Scuba Divers</i>				
British Columbia	79.7%	80.7%	83.4%	64.6%
Hawaii	68.1%	66.8%	55.5%	54.6%
California	54.1%	56.4%	49.8%	47.1%
Quebec	51.3%	43.9%	35.3%	41.6%
Alberta	47.9%	44.9%	45.3%	34.9%
Florida	43.5%	42.0%	35.0%	40.4%
Nova Scotia	40.9%	41.9%	33.5%	32.4%
Ontario	37.7%	43.5%	35.4%	43.3%
New York State	34.4%	35.5%	30.8%	30.4%
Prince Edward Island	34.2%	38.7%	33.8%	32.0%
Newfoundland & Labrador	31.7%	33.1%	30.3%	27.4%
Yukon	29.8%	25.0%	22.1%	16.9%
Northwest Territories	24.0%	21.8%	15.5%	12.3%
New Brunswick	22.7%	33.4%	21.3%	22.9%
Colorado	21.5%	27.1%	17.8%	18.7%
Nunavut	21.3%	17.6%	11.0%	9.1%
Arizona	20.1%	28.4%	22.1%	22.9%
Manitoba	9.3%	9.3%	8.6%	7.5%
Saskatchewan	6.7%	9.9%	10.1%	7.7%

Source: Canadian TAMS Special Tabulations prepared for 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 (2004 and 2005) was a *main reason for taking any of these trips*.²⁰

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 **scuba diving or snorkelling** 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 **scuba diving or snorkelling** 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 scuba divers or snorkellers* 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 **scuba divers or snorkellers** provided in this chapter are appended (see Tables A1, A2 and A3).

²⁰ Presumably, “these trips” are those on which the specific activity took place.

B. Trip Activities & Drivers

1. Divers and Snorkellers' Cross-Over with Other Trip Activity Sectors

As demonstrated by their representation in other activity-based tourism sectors, Divers and Snorkellers are multi-dimensional tourists.²¹ Over 4-in-10 **Divers** are also **Alpine Skiers** (45%), 3-in-10 are **Campers/RVers** (33%), **Anglers** (31%) and/or **travellers on a self-guided tour** (30%) and 1-in-4 are **Hikers** (25%) (see Table 12). Whereas 3-in-10 **Snorkellers** are also **travellers on a self-guided tour** (33%), **Alpine Skiers** (30%), **Campers/RVers** (30%) and/or **Anglers** (30%) and 1-in-4 are **History/Heritage Tourists** (27%) and/or **Hikers** (25%).

By indexing the share of Divers and Snorkellers in each other activity sector to the Canadian pleasure market in total, Divers and Snorkellers' predisposition toward various activity sectors becomes clear (see Index, based on the share of Divers and Snorkellers in each other activity sector relative to the Canadian pleasure market in total).

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

- Divers are seven times as likely to be Sea Kayakers.
- They are four times as likely to be Alpine Skiers.
- They are three times as likely to be Aboriginal Activity Tourists, Hikers and Cyclists/Mountain Bikers.
- Divers are twice as likely to be Backcountry Lodge Guests, Anglers, River Rafters, Nordic Skiers, and Campers/RVers than are the Canadian travelling public as a whole.

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

- Snorkellers are six times as likely to be Sea Kayakers.
- They are four times as likely to be River Rafters.

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 Divers and Snorkellers provided in this chapter are appended (see Table A1).

- They are three times as likely to be Aboriginal Activity Tourists, Backcountry Lodge Guests, Hikers, Nordic Skiers and Alpine Skiers.
- Snorkellers are twice as likely to be Anglers, Cyclists/Mountain Bikers, History/Heritage Tourists and Golfers than are the Canadian travelling public as a whole.

TABLE 12: CROSS-OVER WITH OTHER SELECTED TRIP ACTIVITY SECTORS	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists		Index to All Canadian Tourists**	
	Total	Total	To British Columbia	Any Destination*	Scuba Divers	Snorkellers
	Unweighted base	(176)	(401)	(7,788)	(23,156)	
Weighted, Projected	187,891	319,704	6,002,103	19,946,295		
<i>In Rank order by Scuba Divers</i>						
Divers & Snorkellers	100%	100%	3.4%	2.3%	n/a	n/a
Alpine Skiers	44.6%	30.3%	14.9%	9.7%	460	312
Campers/RVers	33.0%	30.0%	17.7%	16.1%	205	186
Anglers	30.5%	29.9%	10.9%	11.4%	268	262
Self-Guided Overnight Touring Travellers	29.8%	32.9%	22.4%	17.7%	168	186
Hikers	25.1%	24.6%	9.4%	7.6%	330	324
History and Heritage Tourists	20.0%	26.8%	12.2%	12.1%	165	221
Cycling/Mountain Biking	12.5%	9.9%	4.8%	3.8%	329	261
Aboriginal Activity Tourists	11.0%	10.4%	3.7%	2.8%	393	371
Golfers	9.1%	11.8%	7.2%	5.6%	163	211
Backcountry Lodge Guests	8.6%	10.5%	2.6%	2.9%	297	362
Nordic Skiers	7.8%	10.0%	3.8%	3.2%	244	313
Sea Kayakers	6.0%	5.0%	1.4%	0.8%	750	625
Snowmobilers	3.0%	3.7%	1.9%	2.5%	120	148
River Rafters	2.8%	4.5%	1.6%	1.1%	255	409

Source: Canadian TAMS Special Tabulations prepared for 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/hon 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 Divers/Snorkellers in activity sector divided by All Canadian Pleasure (Any Destination) in activity sector, multiplied by 100.

2. Major Trip Activity Groups

By definition, all Divers and Snorkellers are motivated to take overnight pleasure trips in order to engage in diving and snorkelling. Consequently, they are all members of the more broadly defined outdoor water activity market. Like most tourists however, Divers and Snorkellers take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.²²

- In addition to taking trips to go diving and/or snorkelling over 1-in-2 of these Canadians Divers and Snorkellers take trips motivated by engaging in at least one **land-based outdoor activity** (Divers 57%; Snorkellers 58%) and staying in **accommodation** (Divers 56%; Snorkellers 54%). Whilst 1-in-2 Divers are motivated by participating in **outdoor winter activities** (52%), 2-in-5 Snorkellers are interested in these activities (44%).
- Over 3-in-10 Divers and Snorkellers are motivated by **Performing Arts** (Divers 36%; Snorkellers 35%). Whilst 3-in-10 Divers visit **Exhibits/Historic Sites/Museums** (35%) over 4-in-10 Snorkellers (41%) are interested in these activities.
- Around 3-in-10 Divers and Snorkellers are motivated by attending **Festivals and Events** (Divers 29%; Snorkellers 37%) and **Theme/Amusement Parks/Movies** (Divers 27%; Snorkellers 33%).

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, more Divers and Snorkellers *participated* in at least one performing arts experience while on a recent overnight pleasure trip (Divers 69%; Snorkellers 60%) than claim to have taken a trip motivated by one of these activities (Divers 36%; Snorkellers 35%).

Shopping and dining experiences are especially likely to be “one-of-many” trip activities (Divers 93%; Snorkellers 94%) but the driving force behind a trip for relatively few segment members (Divers 22%; Snorkellers 35%). Similarly, over 7-in-10 went on a recent trip to visit exhibits, historic sites and museums (Divers 77%; Snorkellers 79%) but only 3-in-10 Divers (35%) and 4-in-10 Snorkellers (41%) took the trip in order to do so.

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 Divers and Snorkellers provided in this chapter are appended (see Table A1).

Compared to *all* Canadian overnight pleasure travellers, **Divers and Snorkellers** are twice as likely to identify water and winter outdoor activities as ones that *motivated* recent trips (main reason).

Divers are twice as likely to identify as *all* Canadian overnight pleasure travellers are, to identify air-based activities and hands-on learning activities as ones that *motivated* recent trips (main reason).

Summary: Activities that twice as likely to have motivated (main reason) a recent overnight trip for Divers and/or Snorkellers, compared to all Canadian Pleasure travellers.

<u>Major Activity Group</u>	<u>Main Reason</u>			<u>Any Participation</u>		
			All			All
	Scuba		Canadian	Scuba		Canadian
	Divers	Snorkellers	Pleasure Tourists	Divers	Snorkellers	Pleasure Tourists
Air Based	2%	4.7%	0.3%	1%	3%	1%
Outdoor Winter Activities	52%	67%	17%	44%	57%	30%
Outdoor Water-Based	100%	100%	33%	100%	100%	65%
Hands-on Learning	20%	34%	4%	14%	22%	13%

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

	Scuba Divers		Snorkellers	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(176)	(176)	(401)	(401)
Weighted, Projected	187,891	187,891	319,704	319,704
<i>Rank order among Divers - Main Reason</i>				
Outdoor Water Based Activities	100%	100%	100%	100%
Scuba Diving In Lakes /Rivers	39.3%	41.8%	4.0%	5.0%
Scuba Diving In Sea /Ocean	74.5%	77.3%	13.8%	17.7%
Snorkelling In Lakes /Rivers	8.1%	15.5%	19.2%	26.8%
Snorkelling In Sea /Ocean	22.7%	50.6%	88.8%	89.2%
Outdoor Land Based Activities	56.6%	91.7%	57.9%	89.6%
Accommodation Stayed at	55.8%	88.2%	54.3%	88.2%
Outdoor Winter Activities	52.0%	66.7%	43.7%	57.2%
Performing Arts	36.1%	68.5%	35.3%	59.8%
Exhibits/Historic Sites/Museums	34.8%	76.7%	40.7%	78.8%
Festivals & Events	28.9%	48.3%	37.4%	62.9%
Theme/Amusement Parks/Movies	27.3%	59.6%	33.4%	67.6%
Spectator Sports	25.8%	56.2%	29.0%	45.7%
Shopping/Dining/Food Related	22.3%	93.2%	35.1%	94.4%
Hands-on Learning Activities	20.0%	33.9%	13.5%	22.4%
Team Sports/Tournaments/Games	16.2%	31.6%	19.7%	39.1%
Aboriginal Experiences	11.0%	21.5%	10.4%	26.4%
Air Based Activities	2.4%	4.7%	1.3%	3.4%

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

3. Individual Trip Activities: The Outdoors

Many outdoor experiences are popular among Divers and Snorkellers (see Table 14).²³ As their predisposition to snorkel, scuba dive and go to sun/sea destinations might suggest, they are especially interested in water based travel experiences:

Water based Activities:

- **Divers** are especially interested in water-based travel experiences as motivations for recent overnight pleasure trips, over 2-in-5 enjoy sunbathing or sitting on a beach (43%), over 1-in-4 like swimming in oceans (28%) and fishing, especially in fresh water (26%), about 1-in-5 enjoy swimming in lakes (22%) and kayaking/canoeing, especially in freshwater (18%), while over 1-in-10 like motor boating (13%).
- Over 3-in-5 **Snorkellers** enjoy sunbathing or sitting on a beach (63%), over 1-in-2 like swimming in oceans (54%), over 3-in-10 enjoy swimming in lakes (32%), 1-in-4 like fishing, especially in fresh water (27%), while over 1-in-10 like motor boating (15%) and kayaking/canoeing, especially in freshwater (13%).

Land Based Activities:

- Land-based activities are also popular motivations for recent overnight pleasure trips for **Divers**, over 2-in-5 are motivated by Alpine skiing (42%), over 1-in-4 take trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them (26%), while over 1-in-8 like Hiking as a same day excursion (18%) and viewing marine wildlife (14%) and land based wild life (12%).
- Over 1-in-4 **Snorkellers** take trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them (28%) and go alpine skiing (26%), while over 1-in-7 like Hiking as a same day excursion (15%) and viewing marine wildlife (14%) and land based animals (14%).

Comparison to Canadian Pleasure Travellers

Compared to the typical Canadian overnight pleasure traveller, Divers and Snorkellers are more likely to identify passive outdoor activities such as sunbathing on a beach, and *active* ones such as swimming, as ones that motivated recent trips (main reason) and as activities that they 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 Divers and Snorkellers represent a distinctive market.

²³ 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 Divers and Snorkellers provided in this chapter are appended (see Table A2).

These Divers and Snorkellers over about forty times more likely than Canadian pleasure travellers to go snorkelling (lakes/rivers/sea/ocean) and diving (lakes/rivers/sea/ocean). They are seven times more likely to go and view Northern Lights, they are six times as likely to go rock climbing and they are over five times as likely to go kayaking or canoeing on the ocean, go sailing, exercise/jog outdoors, view land based wildlife, go swimming in oceans and view marine wildlife, than Canadian pleasure travellers.

Summary of Outdoor activities where Scuba Divers and Snorkellers 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 – snorkelling in lakes/rivers 45 times - to lowest; Viewing wildlife - whale/marine 5 times more likely than Canadian Pleasure Travellers).

	<u>Main Reason</u>	
	Divers & Snorkellers	All Canadian Pleasure Tourists
Snorkelling In Lakes /Rivers	13.4%	0.3%
Snorkelling In Sea /Ocean	61.8%	1.4%
Scuba Diving In Sea /Ocean	30.5%	0.7%
Scuba Diving In Lakes /Rivers	16.1%	0.4%
Viewing Northern Lights	4.5%	0.6%
Climbing - Rock Climbing	2.4%	0.4%
Kayaking/ Canoeing - Ocean	4.7%	0.8%
Sailing	7.8%	1.4%
Fitness - Jog/Exercise Outdoors	7.4%	1.4%
Viewing Wildlife - Land Based Animals	13.3%	2.5%
Swimming In Oceans	42.9%	8.4%
Viewing Wildlife - Whale/Marine	13.6%	2.7%

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

²⁴ Not all of these activities are included in Table 14 because the activities presented in the summary table required that one-third of Divers and Snorkellers declare an activity as a main reason for an overnight pleasure trip.

TABLE 14: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN & ANY*

	Scuba Divers		Snorkellers	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(176)	(176)	(401)	(401)
Weighted, Projected	187,891	187,891	319,704	319,704
<i>Rank order among Divers - Main Reason</i>				
Scuba Diving In Sea /Ocean	74.5%	77.3%	13.8%	17.7%
Sunbathing/Sitting On A Beach	42.6%	61.6%	62.6%	75.8%
Skiing - Downhill	42.2%	48.0%	26.0%	34.7%
Scuba Diving In Lakes /Rivers	39.3%	41.8%	4.0%	5.0%
Swimming In Oceans	27.8%	65.5%	53.8%	75.5%
Nature Park- National/Provincial	26.2%	45.0%	27.8%	48.9%
Fishing - Fresh Water	26.1%	36.8%	26.8%	38.1%
Snorkelling In Sea /Ocean	22.7%	50.6%	88.8%	89.2%
Swimming In Lakes	21.8%	53.3%	32.1%	59.9%
Kayaking/Canoeing - Freshwater	18.1%	29.7%	13.2%	26.0%
Hiking - Same Day Excursion	18.1%	37.6%	14.9%	40.4%
Viewing Wildlife - Whale/Marine	13.9%	29.6%	14.2%	31.1%
Motor Boating	13.0%	33.0%	15.1%	33.9%
Wildlife - Land Based Animals	11.7%	20.7%	14.0%	34.5%
Fitness - Jog/Exercise Outdoors	8.3%	28.9%	7.2%	29.8%
Snorkelling In Lakes /Rivers	8.1%	15.5%	19.2%	26.8%
Golfing - Occasional Game	5.8%	36.7%	7.4%	29.0%

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

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

By and large, Divers and Snorkellers 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 Divers and Snorkellers (see Table 15), attracting over 1-in-4 of these tourists.

Culture

Divers and Snorkellers are more inclined to engage in a variety of cultural and heritage activities as "one-of-many" trip activities than they are to be motivated to take overnight pleasure trips in order to engage in these activities. For example, about one-half have sought out a well-known historic site, or strolled around a city to observe its buildings and architecture on recent pleasure trips but less than one-quarter have taken a trip in order to engage in these activities. Similar patterns are evident for seeing other historic sites, visiting museums, going to art galleries and participating in hands on learning activities. 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

Perhaps because they tend to live in families with children, Snorkellers are particularly apt to take a trip to go to an **amusement park** (Main, 23%; Any, 34%). Whereas, Divers are drawn to rock & roll or popular music concerts (Main, 20%; Any, 31%).

Snorkellers are also motivated by attending **live theatre performances**, visiting **casinos** and **firework displays**; whereas Divers are motivated by visiting **aquariums** and **firework displays**. All of these entertainment-oriented experiences are much more commonly identified as *one among many* trip activities than as a main reason for taking a trip among both Divers and Snorkellers.

Dining

Similar to many entertainment-oriented activities, dining out is a much more common trip experience (any) than trip drivers (main) for Divers and Snorkellers. Around 1-in-10 Divers and Snorkellers are motivated by dining out at **restaurants offering local ingredients and cuisine** and dining in **high-end restaurants**.

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 Divers and Snorkellers in this chapter are appended (see Table A3).

Shopping

Shopping for apparel, books or music, antiques, local arts and crafts and gourmet food is a common trip pastime for Divers and Snorkellers but tends not to be the motivation for their recent overnight pleasure travel. Significantly more Snorkellers (11%) are motivated by shopping at greenhouses/garden centre than are Divers (2%)

Sports

Over 1-in-4 Divers and Snorkellers attend spectator-sporting events. The difference between *participation* rates (Divers 5-in-10; Snorkellers 4-in-10) and *motivation* rates (2-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, Divers and Snorkellers are more likely to engage in outdoor activities or take trips for these activities. These under water 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).

Divers and Snorkellers are more likely to engage in outdoor activities or take trips for these activities. They are thirteen times as likely to be motivated to attend a wilderness skills course, ten times as likely to play badminton, over eight times as likely to attend aboriginal arts/crafts shows, take courses to learn another language and attending non-sporting amateur tournaments and over seven times as likely to attend national/international sports events, attend aboriginal festivals and events, taste aboriginal cuisine, play football, attend professional golf tournaments and go hot air ballooning, than are *typical* Canadian pleasure travellers (as a main trip motivator).

Summary of other activities where Divers and Snorkellers are *seven 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 at 13 times - to lowest, Hot Air Ballooning at 7 times more likely than Canadian Pleasure Travellers).

<u>Other Activities</u>	<u>Main Reason</u>	
	Divers & Snorkellers	All Canadian Pleasure Tourists
Wilderness Skills Courses	8.0%	0.6%
Badminton	2.0%	0.2%
Aboriginal Arts/Crafts Shows	6.7%	0.8%
Courses Learn Another Language	4.2%	0.5%

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

<u>Other Activities</u>	<u>Main Reason</u>	
	Divers & Snorkellers	All Canadian Pleasure Tourists
Amateur Tournaments Not Sports	4.0%	0.5%
National/ International Sports Event	3.7%	0.5%
Aboriginal Festivals And Events	6.7%	0.9%
Aboriginal Cuisine (Tasted)	4.4%	0.6%
Football	2.9%	0.5%
Professional Golf Tournaments	2.8%	0.4%
Hot Air Ballooning	0.7%	0.1%

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*

	Scuba Divers		Snorkellers	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(176)	(176)	(401)	(401)
Weighted, Projected	187,891	187,891	319,704	319,704
<i>In rank order by main reason within each subgroup (Divers)</i>				
Cultural & Heritage				
Any Performing Arts	36.1%	68.5%	35.3%	59.8%
Festival & Events	28.9%	48.3%	37.4%	62.9%
Hands on Learning Activities	20.0%	33.9%	13.5%	22.4%
Art Galleries	13.9%	38.3%	9.5%	31.5%
Strolling around a city to see architecture	13.2%	53.2%	21.1%	60.6%
Historic sites – well known	10.6%	44.3%	15.8%	48.8%
Farmers' Markets/ Country Fair	10.4%	20.9%	12.2%	35.5%
Historic sites – other	8.4%	37.5%	11.2%	41.1%
Museum - History/Heritage	8.8%	42.8%	10.7%	42.0%
Museum - Science/Technology	6.1%	31.3%	7.5%	23.1%
Sports				
Spectator Sports (Any)	25.8%	56.2%	29.0%	45.7%
Team Sports, Tournaments, Games (Any)	16.2%	31.6%	19.7%	39.1%
Entertainment				
Rock & Roll/Popular Concert	20.2%	31.1%	13.7%	28.3%
Amusement park	17.0%	35.0%	22.7%	33.6%
Aquariums	12.4%	30.3%	8.4%	27.6%
Firework displays	12.2%	25.5%	10.4%	32.3%
Live Theatre	8.0%	29.9%	15.6%	29.7%
Free Outdoor Performances	7.4%	25.3%	10.8%	31.0%
Movies/cinema	7.3%	44.6%	9.0%	40.2%
Imax Movie Theatres	5.3%	31.9%	3.3%	18.8%
Casino	4.4%	35.1%	12.6%	38.6%
Food & Dining				
Dining – restaurants offering local ingredients and recipes	10.5%	66.8%	14.6%	74.8%
Dining - High-End Restaurants	8.0%	39.7%	9.0%	36.6%
Wineries Day Visits Tasting	6.9%	32.4%	5.6%	27.7%
Local outdoor cafes	4.9%	70.1%	7.7%	59.5%
Dining - other high-end (not with international reputation)	4.8%	47.7%	7.2%	41.0%
Shopping				
Clothing, shoes, jewellery	8.2%	69.1%	12.6%	67.1%
Bookstores or music stores	5.3%	59.2%	11.7%	59.3%
Antiques	4.6%	31.6%	7.4%	38.1%
Local arts & crafts studios	3.7%	54.8%	7.1%	58.9%
Retail Gourmet Foods	2.7%	27.1%	2.9%	29.6%
Greenhouse/Garden Centre	1.9%	20.0%	10.6%	33.6%

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 Divers or Snorkellers as ones they participated in (any) on a recent overnight trip.

5. Overnight Cruises & Organized Group Tours

Most Divers and Snorkellers are not recent overnight cruise passengers (see Table 16). Of the 1-in-9 Divers and 1-in-6 Snorkellers who have taken an overnight ocean cruise in the past two years or so (2004 and 2005), destinations in the Caribbean and other locations are more popular than Alaska.

Of those who participate in **overnight group tours**, Divers and Snorkellers who have gone on an overnight-organized tour display a slight preference for tours to *multiple* (Divers 13%; Snorkellers 18%) versus *single* destinations (Divers 12%; Snorkellers 16%). They are also more likely to participate in single and multiple destination tours than are recent Canadian travellers to B.C. (single 8%; multiple 12%) or any other destination (single 8%; multiple 10%).

More Divers and Snorkellers claim to have taken **self-directed** same day touring trips over a two-year period (Divers 50%; Snorkellers 50%) than self-directed day tours that are not organized (Divers 30%; Snorkellers 33%).

Significantly more Divers and Snorkellers take organised **same day group tours** (Divers 44%; Snorkellers 43%). than do than the Canadian travelling public as a whole (22%), or those who have recently travelled to British Columbia (28%).

Favoured themes for organized day excursions include tours around the countryside, city tours, wilderness or outdoor tours and sightseeing cruises. Divers are three times as likely to take airplane or helicopter tours, wilderness or outdoor tours and tours of factories as are *typical* Canadian pleasure travellers.

TABLE 16: CRUISES/GROUP TOURS	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
			To British Columbia	Any Destination*
	Total	Total		
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
Took any overnight cruise in past 2 years				
Type of Cruise/Destination				
Ocean (Net)	11.0%	16.7%	12.6%	8.8%
Ocean – Caribbean	6.9%	12.4%	5.9%	5.3%
Ocean – Other	4.1%	6.9%	5.1%	3.2%
Ocean – Alaska	0.4%	1.4%	4.0%	1.7%
Lake or River cruise (Net)	8.7%	7.2%	3.0%	4.4%
St. Lawrence River	3.1%	2.3%	0.7%	1.9%
Great Lakes	3.1%	1.6%	0.4%	0.8%
Other lake/River	2.8%	3.6%	2.2%	2.3%
Touring				
Overnight group tour – multiple locations	12.7%	17.9%	12.2%	10.2%
Overnight group tour – Single Location	12.2%	15.8%	8.2%	7.9%
Organized group tour – same day	44.3%	42.5%	28.3%	21.9%
Self-Directed tour – same day	49.8%	50.4%	34.8%	28.6%
Self-Directed tour – not organized	29.8%	32.9%	22.4%	17.7%
Unspecified same day tours	0.3%	1.0%	1.9%	2.9%
Type of Organized Day Tour				
<i>(In rank order by Divers)</i>				
Countryside	36.5%	46.7%	26.4%	22.0%
City	35.0%	39.1%	28.4%	22.9%
Wilderness/outdoor	34.2%	31.4%	15.6%	12.7%
Sightseeing cruise (day excursion)	24.2%	28.6%	15.9%	12.8%
Wineries	8.7%	8.7%	8.7%	5.6%
Factory	6.4%	3.4%	4.2%	2.6%
Airplane/helicopter (pilot or passenger)	6.0%	3.0%	3.0%	1.9%
Casino	4.6%	7.5%	6.6%	6.5%

Source: TAMS Canadian Special Tabulations, prepared for 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 Divers and Snorkellers claim to have *personal involvement* in trip planning for **all** or **most** trips planned over the past two years (2004 and 2005).

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

TABLE 17: TRAVEL PLANNING	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
			To British Columbia	Any Destination*
	Total	Total		
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
Frequency of personal involvement in trip planning, past 2 years				
All	70.1%	70.3%	65.9%	61.8%
Most	22.4%	13.6%	16.7%	15.1%
Some	4.5%	13.1%	9.6%	10.3%
None/not stated	3.0%	3.0%	7.8%	12.8%
Main responsibility for trip planning				
Respondent	55.7%	38.2%	37.8%	34.9%
Shared with other household member	19.8%	29.2%	28.7%	27.6%
Spouse/partner	12.2%	17.7%	15.0%	13.5%
Other/not stated/not involved in travel planning	9.3%	12.4%	13.0%	14.8%

Source: TAMS Canadian Special Tabulations, prepared for 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 Divers and Snorkellers, the internet tops the chart (see Table 18). Over 7-in-10 Divers and 8-in-10 Snorkellers rely on the **internet** for travel information, 5-in-10 Divers and 6-in-10 Snorkellers rely on **travel agents**, while 5-in-10 (both Divers and Snorkellers) rely on anecdotal information provided by **friends and relatives** and on their own **past experience**. Over 4-in-10 Divers and 3-in-10 Snorkellers rely on **maps** and 3-in-10 (both Divers and Snorkellers) on **Visitor Information Centres**. Over 1-in-4 Divers and Snorkellers rely on **official DMO travel guides** to obtain travel information. 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 Divers (6%) and Snorkellers (6%) than by Canadian overnight pleasure travellers as a whole (3%) or those who have recently travelled to British Columbia (3%).

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

(In rank order in each column)

<u>Scuba Divers</u>	<u>Snorkellers</u>	<u>Canadian Pleasure Tourists</u>	
		<u>To British Columbia</u>	<u>Total</u>
Internet website	Internet website	Internet website	Internet website
		Advice of friends/ relatives	Advice of friends/ relatives
Travel Agent	Travel Agent	Past experience	Past experience
Advice of friends/ relatives	Past experience	Past experience	Past experience
Past experience	Advice of friends/ relatives	Maps	Travel Agent
Maps	Official DMO travel guides	Travel agent	
Official DMO travel guides	Maps		
Visitor Information Centres	Articles in Newspaper/ Magazine		
	Ads in Newspaper/ Magazine		

With most Divers and Snorkellers relying on the internet for travel planning and with 3-in-5 saying that they *normally* visit **travel websites**, the internet has the greatest reach for snorkelling and diving businesses in British Columbia. Both Divers and Snorkellers are more apt to watch **televised travel shows** (40% Divers; 48% Snorkellers) than to read the **travel section** in their daily newspaper (26% Divers; 29% Snorkellers). General **travel magazines** such as *Condé Nast* are less popular (19% Divers; 22% Snorkellers) than are **outdoor activities/sports magazines** such as *Backpacker* or *Outdoor Life* among Divers (36%) and Snorkellers (28%).

Compared to recent Canadian tourists to British Columbia, Divers and Snorkellers are significantly more likely to read affinity group magazines such as *Outdoor Life* and generic *travel* magazines. Frequent readership of travel sections in a local newspaper's weekend or weekday editions is more common among Divers and Snorkellers and those who have recently travelled to British Columbia.

TABLE 18: INFORMATION SOURCES FOR TRAVEL PLANNING & GENERAL MEDIA HABITS	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination*
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
<i>In rank order by Divers</i>				
SOURCES OF TRAVEL PLANNING INFO				
Internet website	79.0%	87.6%	67.2%	57.2%
Travel agent	53.6%	60.1%	36.0%	30.4%
Advice of friends/relatives	50.7%	54.7%	52.4%	44.9%
Past experience	50.7%	57.7%	52.1%	43.9%
Maps	45.2%	37.7%	39.0%	28.6%
Official DMO travel guides	33.9%	37.8%	27.2%	22.7%
Visitor information centres	31.5%	27.4%	24.7%	20.5%
Travel guide books	27.0%	25.5%	18.1%	11.8%
Articles in Newspaper/Magazine	19.6%	31.8%	21.3%	18.4%
Advertisements in Newspaper/Magazine	17.1%	29.6%	12.8%	12.5%
Auto club	17.8%	26.1%	19.9%	15.6%
Electronic newsletters via e-mail	14.7%	11.8%	4.6%	3.7%
Television Programs	13.5%	16.0%	9.0%	6.6%
Travel information in mail	8.7%	12.9%	7.6%	7.8%
Trade, travel, sportsmen's shows	5.7%	6.2%	3.2%	2.7%
Television Advertisements	2.5%	8.9%	4.0%	4.5%
TRAVEL MEDIA				
Frequently read Travel Section daily newspaper	25.8%	29.2%	21.1%	17.9%
Frequently read weekend edition of newspaper	32.1%	32.1%	24.8%	21.9%
Magazines read in typical month				
<i>(In rank order by Divers)</i>				
Entertainment/Music	39.0%	37.5%	31.1%	32.0%
Outdoor activities/sports	36.3%	27.7%	15.4%	12.6%
Health, fitness and well living	35.1%	28.5%	24.7%	21.7%
Food & Cooking	32.9%	31.6%	26.2%	26.5%
Science and geography	32.1%	27.8%	20.6%	16.3%
News magazine	28.2%	25.3%	25.8%	23.6%
Business/Finance	25.9%	21.5%	19.0%	16.0%
Home & Garden	24.4%	27.5%	23.8%	24.5%
Fashion & Beauty	21.2%	26.8%	21.6%	23.3%
General Interest	20.8%	30.7%	33.0%	30.7%
Travel	18.8%	21.8%	11.3%	11.5%
Normally watch Travel Shows on TV	39.5%	48.2%	33.1%	30.3%
Normally visit Travel websites	62.1%	68.1%	46.3%	39.0%

Source: TAMS Canadian Special Tabulations, prepared for 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, 8-in-10 Divers and Snorkellers who have taken a recent pleasure trip to British Columbia rely on the internet for travel planning (79% Divers; 88% Snorkellers). However, Divers and Snorkellers differ on which websites they most commonly use for travel planning (see Table 19):

- **Divers** rely on **airline** sites (55%), **destination marketing organization** sites (50%), **travel** sites such as *Expedia* or *Travelocity* (45%), **hotel/resort** sites (45%), and **attractions** sites (26%) for travel planning.
- **Snorkellers** rely on **hotel/resort** sites (57%), **travel** sites such as *Expedia* or *Travelocity* (51%), **destination marketing organization** sites (48%), **airline** sites (46%), and **attractions** sites (34%) for travel planning.

Not surprisingly, *booking* on-line is less common than is searching for information on the internet. Nonetheless, 3-in-5 Divers and over 1-in-2 Snorkellers claim to have made a travel-related booking on-line over the past two years or so (Divers 60%; Snorkellers 57%). As their website preferences would suggest, the most common on-line bookings for Divers and Snorkellers is for **air tickets** (Divers 52%; Snorkellers 45%), followed by **accommodation** (Divers 48%; Snorkellers 45%) and to a lesser degree, tickets for car rentals (Divers 29%; Snorkellers 24%) and attractions (Divers 25%; Snorkellers 21%).

Use of the internet for travel planning and for booking travel arrangements is noticeably more widespread among both Divers and Snorkellers than among Canadian overnight pleasure travellers to British Columbia and Canadian overnight pleasure travellers as a whole.

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination*
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
Used Internet website for vacation information, past 2 years	79.0%	87.6%	67.2%	57.2%
<u>Internet website(s) used</u> <i>(Among Users, in rank order by Divers)</i>				
Airline	54.6%	46.1%	39.2%	25.8%
Destination marketing organization	50.0%	48.2%	34.4%	27.7%
Travel planning/booking	45.3%	51.4%	34.4%	25.6%
Hotel/resort	44.8%	56.6%	40.2%	31.9%
Attraction	26.1%	34.2%	23.7%	19.1%
Motorcoach	8.6%	5.8%	1.6%	1.4%
Cruise	6.3%	14.4%	6.2%	4.5%
Other	22.7%	25.8%	17.4%	15.4%
Any Internet Bookings in Past 2 Years <i>(Among All Overnight Pleasure Travellers)</i>	60.1%	57.3%	49.2%	36.6%
<u>Items Purchased On-Line</u> <i>(Among Users, in rank order by Divers)</i>	(100%)	(100%)	(100%)	(100%)
Air tickets	51.7%	45.1%	39.2%	25.1%
Accommodation	48.1%	44.5%	33.8%	25.2%
Car rental	29.0%	23.9%	16.5%	9.8%
Tickets for activities/attractions	24.6%	21.3%	11.9%	8.5%
Package deal (2+ items)	18.7%	15.7%	7.7%	5.6%
Rail, bus, boat tickets	16.8%	11.3%	8.7%	5.6%

Source: TAMS Canadian Special Tabulations, prepared for 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 (2004 and 2005) is relatively uncommon among Divers and Snorkellers (see Table 20). 1-in-10 say they relied on a package deal for *all* or *most* of their trips (Divers 11%; Snorkellers 14%) over the past two years or so and a over 2-in-5 have used package deals for *one* or *some* of these trips (Divers 43%; Snorkellers 49%).

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

The inclusion of tickets for activities and attractions and food and beverages is noticeably more widespread among Divers and Snorkellers than the Canadian travelling public as a whole, or those who have recently travelled to British Columbia.

TABLE 20: PACKAGE DEALS	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination*
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
Frequency of Purchasing Packages in the Past 2 Years				
Most/all trips	10.6%	14.3%	5.9%	7.1%
One/some trips	43.1%	48.5%	27.0%	23.9%
No trips/not stated/not sure	46.2%	37.1%	67.1%	68.9%
Desired Components of Packages (Among Purchasers of Packages)				
<i>In rank order by Divers</i>	(100%)	(100%)	(100%)	(100%)
Accommodation	91.5%	91.6%	84.4%	81.4%
Transport to destination	85.0%	85.4%	80.2%	72.2%
Food and beverage	61.1%	69.0%	48.5%	52.2%
Transport at destination	53.1%	57.3%	51.9%	49.8%
Tickets for activities/attractions	52.5%	52.9%	43.1%	45.2%
Other	8.5%	20.0%	11.9%	11.7%

Source: TAMS Canadian Special Tabulations, prepared for 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 6-in-10 **Divers** is a *break from the day-to-day environment* (65%) and to *see and do something new or different* (62%), while 5-in-10 want the ability to *relieve stress* (59%) or be the basis of lasting *memories* (56%) (see Table 21).²⁷

On the other hand, 7-in-10 **Snorkellers** put the ability to *relieve stress* (78%) at the top of their list, followed by is a *break from the day-to-day environment* (74%). Over 6-in-10 Snorkellers want to *see and do something new or different* (64%), to help *enrich familial relationships* (64%) or be the basis of lasting *memories* (64%).

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 Divers, Snorkellers and Recent Pleasure Tourists to British Columbia and Any Destination²⁸

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

While not as widely endorsed as those cited above, 4-in-10 Divers and Snorkellers are interested in enriching their perspectives on life. 4-in-10 Divers and 2-in-10 Snorkellers want to be being physically challenged²⁹, while 4-in-10 Divers and 3-in-10 Snorkellers are interested in gaining knowledge of history, other cultures or other places. Over 5-in-10 Snorkellers and 3-in-10 Divers are looking to avoid a fixed schedule and 3-in-10

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.

Divers and Snorkellers want to help keep family ties alive. Benefits with low appeal to Divers and Snorkellers include stimulating their minds or being intellectually challenged, experiencing solitude and isolation, having stories to tell once the trip is over, being pampered and renewing connections with people (other than family).

TABLE 21: BENEFITS SOUGHT FROM PLEASURE TRAVEL	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination*
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
<i>% Stating "Highly Important"</i>				
<i>In rank order by Divers</i>				
Break from day-to-day environment	65.3%	74.2%	66.5%	66.8%
See/do something new/different	61.7%	64.1%	49.3%	44.0%
Relax/relieve stress	59.0%	77.5%	65.0%	65.4%
Create lasting memories	56.3%	63.6%	55.6%	52.3%
Enrich relationship with partner/children	48.4%	63.7%	54.5%	52.8%
Enrich perspectives on life	43.4%	41.7%	31.9%	27.7%
Physical challenge	42.7%	25.7%	18.1%	15.7%
Knowledge of history, cultures, places	41.4%	32.4%	27.7%	24.3%
No fixed schedule	38.5%	56.2%	42.8%	47.8%
Keep family ties alive	30.6%	39.8%	43.6%	43.5%
Stimulate mind/intellectual challenge	29.6%	28.9%	19.3%	17.4%
Solitude and isolation	16.8%	11.4%	8.9%	9.3%
Stories to share	11.2%	16.4%	12.4%	12.9%
To be pampered	11.2%	21.1%	9.9%	13.3%
Renew personal connections (non-family)	10.2%	25.9%	20.3%	18.9%

Source: TAMS Canadian Special Tabulations, prepared for 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 Divers and Snorkellers say that they have taken an overnight pleasure trip during the **summer months** (Divers 97%; Snorkellers 93%); this is higher than the Canadian travelling public as a whole (86%), and those with recent travel to British Columbia (90%) (see Table 22).

Significantly more Divers and Snorkellers take **winter trips** (Divers 83%; Snorkellers 86%) than do the Canadian travelling public as a whole (64%), and those with recent travel to British Columbia (70%).

TABLE 22: INCIDENCE OF SUMMER/ WINTER PLEASURE TRIPS	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination*
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
Took Overnight Pleasure Trip in Past 2 Years In . . .				
Summer	97.3%	93.4%	89.7%	86.4%
Winter	83.0%	85.7%	70.4%	64.0%

Source: TAMS Canadian Special Tabulations, prepared for 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

Divers and Snorkellers differ in the memberships that they hold. Over 4-in-10 Divers are members of a **sports club** (45%), a **frequent flyer program** (44%) and an **Auto club** (41%) (see Table 23). Whereas 4-in-10 Snorkellers are members of a **frequent flyer program** (43%) and an **Auto club** (42%), while 3-in-10 are members of a **sports club** (36%).

Compared to the Canadian travelling public as a whole, Divers and Snorkellers memberships are higher for all listed organizations, with the exception of book/reading club which is lower for Snorkellers (4%) than the Canadian travelling public as a whole (5%).

TABLE 23: MEMBERSHIPS	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination*
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
<i>In rank order by Divers</i>				
Sports club	44.5%	36.3%	28.9%	23.5%
Frequent flyer program	44.2%	43.4%	38.3%	25.7%
Auto club	40.7%	42.2%	46.5%	38.3%
Hotel/car rental loyalty program	16.8%	17.9%	14.0%	8.8%
Hobby club	15.0%	6.8%	5.4%	4.6%
Community service club	8.2%	15.4%	11.2%	10.7%
Book/reading club	6.7%	3.5%	5.4%	4.9%
Nature/environmental club	3.8%	8.6%	4.6%	3.5%
Travel club	0.8%	5.4%	2.9%	2.1%

Source: TAMS Canadian Special Tabulations, prepared for 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

Over 5-in-10 Canadian Snorkellers (55%) and 6-in-10 Divers (62%) have taken a camping trip in the past two years. Of these Divers and Snorkellers that camp, they use a *tent* most often for shelter on recent camping trips (Divers 48%; Snorkellers 39%) to a much greater extent than they rely on a *motor home or RV* for shelter (4% both Divers and Snorkellers).

Use of a *Tent* among Divers and Snorkellers who go camping (Divers 48%; Snorkellers 39%), is higher than is the case among typical Canadian tourists (25%) who have been camping and those who have recently travelled to British Columbia (28%).

	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination*
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
Took Camping Trip in Past Two Years (2004 and 2005).	62.0%	55.2%	46.2%	40.0%
<i>In rank order by Divers</i>				
Tent	47.8%	38.6%	28.2%	25.4%
Travel trailer/fifth wheel	5.0%	5.4%	7.1%	6.0%
Motor home or RV	4.0%	4.3%	5.0%	3.4%
Truck camper or van	3.2%	2.0%	3.3%	2.0%
Tent trailer	1.9%	5.0%	2.7%	3.2%

Source: TAMS Canadian Special Tabulations, prepared for 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

Use of lodging among Divers and Snorkellers (both 88%) is higher than is the case among typical Canadian tourists (64%) and those who have recently travelled to British Columbia (73%).

Campgrounds are a popular form of accommodation for Divers while on vacation. Nearly 1-in-2 Divers have stayed at a public campground (48%), while Snorkellers prefer staying at seaside resorts (52%). Resorts are also popular with Divers, with over 2-in-5 staying in a seaside resort (47%), and over 1-in-3 Divers and Snorkellers enjoy staying at lakeside/riverside resorts (Divers 40%; Snorkellers 35%) and ski or mountain resorts (Divers 32%; Snorkellers 34%).

TABLE 25: LODGING USED WHILE ON AN OVERNIGHT PLEASURE TRIP IN PAST TWO YEARS (2004 and 2005)	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination*
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
<i>In rank order by any participation within each subgroup (Divers)</i>				
Used Any Lodging	88.2%	88.2%	73.4%	63.8%
Camping				
Public campground in national/provincial/state park	47.6%	30.0%	32.8%	25.8%
Private Campground	34.5%	36.0%	22.9%	18.4%
Campsite in wilderness setting	26.0%	19.8%	12.1%	8.4%
Resort/Spa				
Seaside Resort	47.3%	51.8%	26.5%	20.3%
Lakeside/riverside resort	39.8%	34.9%	26.6%	22.1%
Ski resort or mountain resort	32.2%	33.8%	23.8%	13.6%
Health Spa	17.0%	12.2%	6.9%	5.8%
Backcountry Lodge/Outpost				
Wilderness Lodge By Car	11.1%	13.9%	5.6%	5.5%
Remote/Fly-In Wilderness Lodge	3.1%	6.8%	2.7%	1.6%
Remote/Fly-In Wilderness Outpost	2.5%	2.0%	1.0%	0.6%
Motorhome/RV while touring (not camping)	6.5%	3.7%	7.0%	4.5%
Houseboat	6.3%	3.3%	2.5%	1.4%
Farm or guest ranch	4.5%	6.1%	4.5%	2.9%

Source: TAMS Canadian Special Tabulations, prepared for 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 Divers and Snorkellers have regular access to **cottages and/or cabins** (Divers 41%; Snorkellers 40%) than do recent visitors to British Columbia (32%) and the Canadian travelling public as a whole (33%). Divers and Snorkellers' access to cottages and/or cabins in their home province (Divers 33%; Snorkellers 32%) is also higher than recent visitors to British Columbia (25%) and the Canadian travelling public as a whole (28%).

1-in-4 Divers (25%) and 3-in-10 Snorkellers (30%) own canoes or kayaks; ownership of this type of equipment is appreciably higher among Divers and Snorkellers than it is among recent visitors to British Columbia (17%) and the Canadian travelling public as a whole (15%). Over 2-in-10 Divers and Snorkellers own motorboats (Divers 23%; Snorkellers 20%) this is evidence of their preference for water-based activities and staying at riverside or lakeside resorts. However, ownership of a motor home/camper/RV, ATV, snowmobile or sailboat is less common.

TABLE 25: RECREATION OWNERSHIP	Scuba Divers	Snorkellers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination*
Unweighted base	(176)	(401)	(7,788)	(23,156)
Weighted, Projected	187,891	319,704	6,002,103	19,946,295
<i>In rank order by Divers</i>				
Cottage/Cabin				
Cottage/cabin regular access	41.7%	40.0%	32.1%	32.8%
Cottage/cabin in home province	32.7%	31.7%	25.0%	27.9%
Cottage/cabin other province	15.5%	8.4%	8.1%	4.8%
Cottage/cabin outside Canada	4.9%	5.2%	3.4%	3.1%
Canoe/kayak	24.6%	30.2%	17.3%	15.4%
Motor boat	23.1%	20.1%	17.2%	17.0%
Motor home, camper, RV	14.0%	14.9%	19.8%	15.3%
All-terrain vehicle (ATV)	11.2%	12.8%	11.3%	12.9%
Snowmobile	9.9%	9.6%	7.3%	10.0%
Sailboat	8.7%	4.5%	4.4%	3.1%

Source: TAMS Canadian Special Tabulations, prepared for 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	Parks Canada
Atlantic Canada Tourism Partnership	Ontario Tourism Marketing Partnership
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 (2004 and 2005) 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%
Hands-On Learning Activities	4.2%	16.9%	3.7%	13.3%
Aboriginal Experiences	3.7%	17.5%	2.8%	11.3%
Air-Based Activities	0.5%	1.6%	0.3%	1.1%

Source: TAMS Canadian Special Tabulations, prepared for 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%
Alpine skiing	12.8%	17.7%	8.4%	12.1%
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%
Swimming in oceans	6.8%	33.0%	8.4%	28.2%
Hiking - same day excursion	6.5%	33.1%	5.3%	23.8%
Golfing - Occasional Game	4.6%	21.6%	3.5%	15.9%
Motor Boating	4.1%	20.6%	3.9%	17.9%
Kayaking/Canoeing - Freshwater	3.3%	11.9%	3.8%	11.6%
Viewing Wildlife - Whale/Marine	3.3%	15.5%	2.7%	11.0%
Viewing Wildlife - Land Based Animals	2.9%	17.9%	2.5%	13.6%
Snorkelling In Sea /Ocean	2.2%	15.0%	1.4%	10.2%
Fitness – Jogging/Exercise Outdoors	1.5%	15.7%	1.4%	11.2%
Scuba Diving In Sea /Ocean	1.3%	4.9%	0.7%	2.8%
Scuba Diving In Lakes /Rivers	0.5%	1.0%	0.4%	0.8%
Snorkelling In Lakes /Rivers	0.3%	3.4%	0.3%	2.4%

Source: TAMS Canadian Special Tabulations, prepared for Tourism British Columbia. **Activities shown here are those that are named by at least 1-in-3 Divers and Snorkellers 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%
Art Galleries	3.8%	25.6%	3.4%	19.2%
Museum - History/Heritage	3.7%	29.7%	3.9%	23.1%
Farmers' Markets/ Country Fair	2.9%	26.1%	3.8%	19.6%
Museum - Science/Technology	1.7%	12.4%	2.1%	10.1%
Sports				
Spectator Sports (Any)	15.3%	33.8%	13.4%	27.5%
Team Sports/Tournaments/Games	9.0%	23.5%	8.8%	21.8%
Entertainment				
Amusement park	8.6%	23.7%	8.6%	21.3%
Rock & Roll/Popular Concert	5.9%	13.9%		
Casino	4.9%	26.9%	5.9%	25.6%
Live Theatre	4.7%	18.8%		
Movies/cinema	3.2%	33.9%	3.7%	27.9%
Free Outdoor Performances	2.6%	18.5%	3.4%	17.1%
Firework displays	2.5%	15.9%	3.2%	15.7%
Aquariums	2.2%	19.4%	2.1%	13.4%
Imax Movie Theatres	1.6%	14.6%	1.7%	11.6%
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%
Shop - Greenhouse/Garden Centre	1.6%	19.9%	2.2%	16.7%
Shop - Retail Gourmet Foods	1.6%	22.3%	1.5%	17.6%
Food & Dining				
Dining – restaurants offering local ingredients and recipes	4.2%	65.1%	5.5%	57.1%
Wineries Day Visits Tasting	3.4%	24.4%	2.9%	16.5%
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%
Dining - High-End Restaurants	2.3%	22.5%	2.1%	17.4%

Source: TAMS Canadian Special Tabulations, prepared for Tourism British Columbia. **Activities shown here are those that are named by at least about 1-in-3 Divers and Snorkellers 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.