



RESEARCH & PLANNING

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

Focus on Nordic Skiers & Other Non-Alpine Winter Sport Participants

November 2008

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Acknowledgments

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

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

TAMS was a partnership of the following organizations:

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

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

I. Executive Summary

NORDIC SKIERS ARE A NICHE MARKET FOR BRITISH COLUMBIA

At over 600,000, *Nordic Skiers* – Canadian adults who take vacations *in order to* participate in *cross-country skiing, snowshoeing, dog sledding, ski touring* and *cross-country or backcountry skiing as an overnight tourism trip* – are an important tourism market. They represent 1-in-29 of the 20.0 million Canadian overnight pleasure travellers to *any destination* and 1-in-26 of the 6 million Canadians who have come to British Columbia for a vacation during 2004 or 2005.

BRITISH COLUMBIA ATTRACTS NORDIC SKIERS AT A HIGHER THAN AVERAGE RATE.

While a small niche market, Nordic Skiers 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 231,568, this sector represents about 4% 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.

Nordic Skiers live in every province but not surprisingly, are apt to reside in provinces where opportunities to participate in the sport are most prevalent – such as Central Canada and to a lesser degree in the West.

Participating in *Nordic Ski and related activities* seems to be particularly popular among pleasure tourists who reside in the larger cities in Central Canada, such as **Montreal, Toronto, Quebec City** and **Ottawa**. **Vancouver** has the highest percentage of Nordic Skiers in the West. In contrast, Nordic Skiers are less likely to live in the Maritimes and the Prairie Provinces.

Regional marketing efforts to attract Nordic Skiers may be challenging, particularly in light of increased airfares, as these tourists are concentrated in Montreal, Toronto and Quebec City.

NORDIC SKIERS TEND TO BE IN THEIR MID-THIRTIES TO MID-FIFTIES

There is almost identical distribution by gender among Nordic Skiers. While every age group is represented among Nordic Skiers, they tend to be concentrated in the middle of the age spectrum. Less than 1-in-6 are young adults (18 to 24 years) but 1-in-5 are in their mid-twenties to mid-thirties and nearly 1-in-4 are in their mid-thirties to mid-forties and a further 1-in-5 are in their mid-forties to mid-fifties. Less than 1-in-10 are 65 years of age or older.

NORDIC SKIERS ARE EDUCATED AND AFFLUENT.

Tourists in this niche market tend to be more educated (nearly 3-in-4 Nordic Skiers have a **post-secondary diploma or University degree**), are more apt to be full-time paid employees (over 1-in-2) and have higher incomes (3-in-10 earn over \$100,000) than typical Canadian pleasure tourists.

OVER 3-IN-10 CANADIAN NORDIC SKIERS HAVE BEEN TO BRITISH COLUMBIA ON A RECENT OVERNIGHT PLEASURE TRIP.

British Columbia is more successful in attracting Nordic Skiers (34%) vis à vis the general travelling public in Canada (30%).

QUEBEC AND ONTARIO ARE THE MAIN COMPETITORS FOR THESE TRAVELLERS.

Quebec (64%) and **Ontario** (60%) are the main provincial competitors for Canadian Nordic Skiers. The **United States** clearly leads the International market (over 1-in-2) but other foreign competitive destinations for Nordic Skiers include *Europe*, the *Caribbean* and *Mexico*.

A SAFE DESTINATION IS A PRIORITY.

Most Nordic Skiers start a trip planning process with a *destination* in mind although 1-in-5 of these tourists start their trip planning process with a focus on the **type of vacation experience** they wish to have and on the **activities** they want to enjoy while on their trip. The destination should be *safe*, offer *convenient access by car*, pose *no health concerns*, have *many things for adults to see and do*, offer *camping* and *mid-range accommodation*.

NORDIC SKIERS ARE MULTI-DIMENSIONAL TRAVELLERS BUT TEND TO BE OUTDOOR TOURISTS.

There is considerable overlap between Nordic Skiers and other outdoor sectors of interest to tourism businesses in British Columbia. As demonstrated by their representation in other activity-based tourism sectors, Nordic Skiers are multi-dimensional travellers.

2-in-5 Nordic Skiers are also **Hikers** and/or **Campers/RVers**, over 1-in-3 are **travellers on a self-guided tour** and/or **Alpine Skiers**, over 1-in-4 are **Cyclists/Mountain Bikers** and/or **History & Heritage Tourists** and 1-in-5 are **Anglers**.

Their predisposition toward outdoor activities is evident in the fact that Nordic Skiers are at least nine times as likely as are Canadian travellers as a whole to be Sea Kayakers, seven times as likely to be Cyclists/Mountain Bikers, five times as likely to be River Rafters and/or Hikers, and three times as likely to be Aboriginal Activity Tourists, Backcountry Lodge Guests, and/or Alpine Skiers. Nordic Skiers are twice as likely to be Divers/Snorkellers, Campers/RVers, History & Heritage Tourists, Golfers, Travellers on self-guided tours, and/or Snowmobilers, than are the Canadian travelling public as a whole.

MANY OUTDOOR EXPERIENCES ARE POPULAR AMONG NORDIC SKIERS

Their higher level of engagement with the outdoors on trips vis à vis the typical Canadian tourist suggests that these Nordic Ski enthusiasts represent distinctive markets. Although they particularly enjoy land based activities Nordic Skiers are also partial to water based activities. They like to be active while on vacation but they also enjoy taking time to enjoy and relax in nature. Their *land based outdoor* interests include snowshoeing, alpine skiing, hiking, taking trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them and cycling.

Water based activities are also popular motivations for recent overnight pleasure trips for Nordic Skiers, activities include enjoying sunbathing or sitting on a beach, swimming in lakes or oceans, and kayaking/canoeing, especially in fresh water.

NORDIC SKIERS ARE NOT ESPECIALLY DRIVEN TO TAKE CULTURAL, CULINARY OR SHOPPING TRIPS.

By and large, Nordic Skiers 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. Cultural and Heritage-oriented activities in general, and particularly performing arts and festivals and events are however, trip motivators for Nordic Skiers, attracting over 1-in-3 of these tourists.

Nordic Skiers 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, 1-in-2 have **strolled around a city to observe its buildings and architecture** on recent pleasure trips but less than 1-in-5 have taken a trip in order to engage in these activities. Similar patterns are evident for seeing **historic sites**, well know and other. These tourists are about three times as likely to engage in these activities *as one of their trip activities* as they are to consider them as the driving force behind the trip.

Nordic Skiers are especially drawn to **going to the movies**, and attending **free outdoor performances**, as things to see and do on recent overnight pleasure trips. All of these entertainment-oriented experiences are much more commonly identified as *one among many* trip activities than as a main reason for taking a trip among Nordic Skiers.

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

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

THE INTERNET TOPS THE CHART AS A TRIP PLANNING TOOL.

Over 7-in-10 Nordic Skiers rely on the **internet** for travel information; over 6-in-10 on anecdotal information provided by **friends and relatives**, whilst 5-in-10 rely on their own **past experience**, 4-in-10 rely on **official DMO travel guides** and **maps**, and over 3-in-10 rely on **Visitor Information Centres**, **articles in newspaper/magazine** and/or **travel agents**. 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.

NORDIC SKIERS HAVE VERY FAVOURABLE IMPRESSIONS OF BRITISH COLUMBIA.

Canadian Nordic Skiers are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel; they accord B.C. a rating of 8.7 on a ten-point scale. Though lower than B.C.'s, moderately favourable ratings are accorded a host of destinations, including **Quebec** (8.1), **Hawaii** (7.8), **California** (7.4), **Alberta** (7.4), **Nova Scotia** (7.3) and **Prince Edward Island** (7.1).

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

THEIR LOCATION IN CENTRAL CANADA IS A KEY CHALLENGE IN ATTRACTING NORDIC SKIERS TO BRITISH COLUMBIA.

With their particular constellation of outdoor interests, Canadian Nordic Skiers are an ideal market for the province. At present, however, only four percent of Canadian pleasure travellers to the province are Nordic Skiers. Regional marketing efforts to attract Nordic Skiers may be challenging, particularly in light of air access challenges (such as increased airfares and reduced capacity), as these tourists are concentrated in Montreal, Toronto and Quebec City.

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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 **Nordic Skiers & Other Non-Alpine Winter Sport Participants**, hereafter referred to as **Nordic Skiers** and/or **Nordic Ski and related activities**.

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 Nordic Skiers Report

For purposes of this report, Canadian **Nordic Skiers** 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

To participate in *any Nordic Skiing*:

- ❖ To participate in *Cross Country Skiing*
- ❖ To participate in *Cross Country or back country skiing as an overnight touring trip*
- ❖ To participate in *Ski Jouring* (Cross Country skiing while being pulled by a harnessed dog or sometimes a horse or reindeer).

To participate in *Dog sledding*

To participate in *Snowshoeing*

Note to Readers

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

In other words, Canadian Nordic Skiers claim to have taken an overnight trip motivated by Nordic Ski/related activities 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, Nordic Skiers may or may not have been participating in Nordic Ski/related activities in a particular country, province or state they have visited recently for an overnight pleasure trip.

People who take a trip *in order to* participate in Nordic Ski/related activities (*Nordic Skiers*) are only a fraction of tourists who participate in Nordic activities on their vacations. Of the 24.7 million Canadian Pleasure Travellers, 1-in-14 (6.9% or 1,715,769) went cross-country skiing or snowshoeing while on an out-of-town, overnight trip of one or more nights⁵.

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

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: Activity Profile Cross Country Skiing & Snowshoeing while on Trips*, Tourism BC, December 2007, pg 4
http://www.tourism.bc.ca/pdf/TAMScan2006%20_XCountrySkiingAndSnowshoeing_Lang.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 (42.9%) of the Canadian overnight pleasure travel market, or about 8.6 million tourists, have had *some* experience with British Columbia over the past decade.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) (30.1% or 6.0 million).

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

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

Most of these recent Canadian visitors to the province – 6 million of them – were on vacation or pleasure trips. In other words, while tourism businesses in British Columbia may be competing for the attention of about 20 million Canadian overnight pleasure travellers, they have attracted 3-in-10 (30.1%) 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	679,142	3.4%	231,568	3.9%	115
Aboriginal Activity Tourists	564,047	2.8%	220,826	3.7%	132
Divers & Snorkellers	459,261	2.3%	202,907	3.4%	148
Backcountry Lodge Guests	578,207	2.9%	155,296	2.6%	90
Snowmobilers	498,926	2.5%	112,498	1.9%	76
River Rafters	215,481	1.1%	98,220	1.6%	145
Sea Kayakers	153,231	0.8%	84,351	1.4%	175

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

¹Sectors represent overnight pleasure travellers who name specific activities as the **main reason** for one or more overnight trips over a two-year period. These sectors were selected by Tourism British Columbia for the purposes of this report. This list does not represent the full range of sectors in the British Columbian tourism industry. **Index calculation: Percentage of Pleasure visitors to BC in activity sector divided by All Canadian Pleasure (Any Destination) in activity sector, multiplied by 100.

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.

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. Nordic Skiers Market Profile

A. Market Composition

The Nordic Ski sectors are composed of Canadian pleasure tourists who participated in one or more of four types of winter outdoor activities as the *main reason* for an overnight trip in the past two years (2004 and 2005). They represent 1-in-29 of the 20.0 million Canadian overnight pleasure travellers to *any destination* and 1-in-26 of the 6 million Canadians who have come to British Columbia for a vacation in the past two years or so.

Looking at Nordic Skiers to any destination, those who participate in cross-country skiing dominate this sector at 74%, followed by those who claim to have participated in snowshoeing (31%), whilst 9% took part in dog sledding.¹²

Table C below illustrates the percentage and total number of Canadian Nordic Skiers, as well as Canadian Overnight Pleasure Travellers, to any destination and British Columbia, who indicated that their *main trip purpose* was to participate in the activities listed below:

TABLE C: MAIN REASON FOR TAKING OVERNIGHT TRIPS IN 2004-2005	Total Nordic Skiers	Total Canadian Pleasure Tourists British Columbia	Total Canadian Pleasure Tourists Any Destination
<i>Unweighted Base</i>	(836)	(7,788)	(23,156)
<i>Weighted, Projected</i>	679,142	6,002,103	19,946,295
All Nordic	679,142	231,568	679,142
<i>Percentage</i>	100%	3.9%	3.4%
Cross-Country Skiing	500,349	191,801	500,349
<i>Percentage</i>	73.7%	3.2%	2.5%
Snowshoeing	210,040	54,843	210,040
<i>Percentage</i>	30.9%	0.9%	1.1%
Dog Sledding	64,084	8,867	64,084
<i>Percentage</i>	9.4%	0.1%	0.3%
Ski-Jouring	0	0	0
<i>Percentage</i>	0.0%	0.0%	0.0%

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

Readers should bear in mind the prominence of *cross-country skiers* among Nordic Skiers in the analysis provided in the following pages.

¹² Sum of percentages for various Nordic activities is more than one hundred percent because of duplication.

B. Regional and Demographic Characteristics

1. Place of Residence

At over 600,000, **Nordic Skiers** – Canadian adults who take vacations *in order to* participate in *cross-country skiing, snowshoeing, dog sledding or ski touring*- are a niche market. They represent 1-in-29 Canadian overnight pleasure travellers to *any destination* (3%) and 1-in-26 of the six million Canadians who have come to British Columbia for a vacation in the past two years or so (4%).

Table 1 provides the place of residence by city, which emerge as noteworthy for Nordic Skiers.

- Nordic Skiers live in every province.
- Participating in Nordic *Ski and related activities* seems to be particularly popular among pleasure tourists who reside in the larger cities in Central Canada, such as **Montreal** (25%), **Toronto** (15%), **Quebec City** (6%) and **Ottawa** (4%).
- **Vancouver** has the highest percentage of Nordic Skiers (5%) in the West.
- In contrast, Nordic Skiers are less likely to live in the Maritimes and the Prairie Provinces.

Regional marketing efforts to attract Nordic Skiers may be challenging, particularly in light of increased airfares, as these tourists are concentrated in Montreal, Toronto and Quebec City.

TABLE 1: PLACE OF RESIDENCE	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
Incidence of Nordic Skiers	100%	3.9%	3.4%
Maritimes			
Halifax	0.7%	0.6%	1.2%
Quebec			
Quebec City	6.2%	0.4%	2.3%
Montreal	24.7%	4.1%	11.6%
Ontario			
Ottawa	3.5%	2.0%	2.9%
Toronto	14.5%	9.1%	16.6%
Hamilton	1.6%	1.3%	2.2%
Kitchener	1.0%	0.7%	1.5%
Manitoba			
Winnipeg	0.8%	2.4%	2.1%
Saskatchewan			
Regina	0.3%	0.9%	0.6%
Saskatoon	0.7%	1.2%	0.8%
Alberta			
Calgary	3.8%	9.0%	3.7%
Edmonton	3.6%	7.6%	3.4%
British Columbia			
Vancouver	5.1%	20.6%	7.7%
Victoria	1.1%	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 Nordic Skiers, they tend to be concentrated in the **middle of the age spectrum**. Less than 1-in-6 are young adults (18 to 24 years, 14%) but 1-in-5 are in their mid-twenties to mid-thirties (19%) and nearly 1-in-4 are in their mid-thirties to mid-forties (24%) and a further 1-in-5 are in their **mid-forties to mid-fifties** (22%). Less than 1-in-10 are 65 years of age or older (7%) (see Table 2).

While Nordic Skiers' age distribution closely resembles the age profile of all Canadian tourists and the typical Canadian visitor to British Columbia, it differs from both particularly in the **mid-thirties to mid-forties** age range and **oldest** end of the age spectrum, with younger Nordic Skiers and fewer older Nordic Skiers. Nordic Skiers represent nearly 1-in-4 travellers aged 35-44 years whilst all Canadian pleasure tourists (to B.C. or Canada) represent 1-in-5. Only 7% of the Nordic Ski market is 65 and older, whilst 14% of all Canadian pleasure tourists to B.C. and any destination are aged 65 years and older.

There is almost identical distribution by gender among Nordic Skiers, 50.4% are male and 49.6% are female.

Nearly **1-in-2 male** and **female** Nordic Skiers are between **35 to 54** years of age (male 47%; female 44%).

Over 3-in-10 male and female Nordic Skiers are aged between 18 and 34 years (male 31%; female 34%) and more than 1-in-5 are aged 55 years and older (male 22%; female 22%).

TABLE 2: AGE & GENDER	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
Age			
18 – 24 Years	13.5%	12.9%	12.7%
25 – 34 Years	19.4%	18.4%	18.8%
35 – 44 Years	23.6%	18.7%	20.4%
45 – 54 Years	21.5%	21.3%	20.2%
55 – 64 Years	15.0%	14.9%	14.4%
65+ Years	7.0%	13.9%	13.5%
Gender			
Men			
18 – 34 Years	31.4%	32.8%	32.2%
35 – 54 Years	46.5%	39.5%	41.0%
55+ Years	22.0%	27.7%	26.7%
Women			
18 – 34 Years	34.3%	29.8%	30.7%
35 – 54 Years	43.5%	40.4%	40.3%
55+ Years	22.1%	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

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

Close to 3-in-10 Nordic Skiers report annual household incomes **over \$100,000** bracket (30%); this is higher than Canadian travellers as a whole (22%) and visitors to B.C. (29%) and the same proportion have household incomes between \$60,000-\$99,999 (31%). Less than one-fifth of Nordic Skiers fall in the \$40,000-\$59,999 (14%) and under \$40,000 categories (18%).

Close to 1-in-2 Nordic Skiers have a **university degree** (48%) and just under 1-in-4 have a **post-secondary diploma or certificate** (24%), whereas 1-in-5 Canadian travellers (to B.C. or Canada) have a post-secondary diploma or certificate and 1-in-3 have a University degree.

Not surprisingly in light of the age categories that Nordic Skiers fall in, a high percentage are **employed** (55%). Their occupation or work status situation closely resembles recent visitors to B.C. and the Canadian travelling public as a whole (with the exception of fewer Nordic Skier retirees).

TABLE 3: EDUCATION, OCCUPATION, INCOME	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
Education			
High school diploma or less	16.4%	32.6%	36.7%
Some post-secondary	10.2%	11.9%	10.9%
Post-secondary diploma or certificate	24.4%	19.5%	21.6%
University degree+	48.3%	35.4%	30.0%
Occupation/Work Status			
Work 30+ hrs/week as paid employee	54.7%	58.3%	47.8%
Work as paid employee but part-time (less than 30 hrs/week)	6.1%	6.1%	5.4%
Self-employed/Unpaid worker at a family business	8.1%	12.8%	9.9%
Going to school	7.7%	6.5%	7.2%
Homemaker	4.2%	6.1%	5.5%
Retired	12.6%	17.8%	17.4%
Household Income			
Under \$40,000	18.4%	17.8%	20.6%
\$40,000 - \$59,999	13.7%	13.9%	14.6%
\$60,000 - \$99,999	30.7%	27.0%	27.1%
\$100,000+	30.4%	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

Close to 7-in-10 Nordic Skiers **live with a spouse or partner** (with or without children) (67%) and 2-in-5 live with a spouse/partner and **no children 17 years or younger** (41%), with only 1-in-5 living with children 17 years or younger (19%) (see Table 4).

More Nordic Skiers live with **children and no spouse/partner** (8%) than do *typical* tourists to British Columbia (5%) and any destination (7%).

TABLE 4: HOUSEHOLD CHARACTERISTICS	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
"Do you live:"			
Alone	11.3%	10.3%	10.7%
With spouse/partner & no children 17 years or younger	41.3%	38.6%	38.0%
With spouse/partner & children 17 years or under	19.3%	23.5%	22.0%
With spouse/partner & children 18 years & over but none under 17 years	6.8%	7.9%	7.8%
With children and no spouse	8.2%	5.1%	6.7%
Someone other than spouse/child	10.7%	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 Nordic Skiers indicated that they have taken recent vacations within Canada and 1-in-3 claim to have travelled *only* within Canada (33%); this is higher than for Canadian travellers to B.C. (28%), but lower than Canadian pleasure travellers to any destination (36%) (see Table 5). Over 1-in-2 has been to the United States on a recent overnight pleasure trip (55%), suggesting that the U.S.A. is a particularly attractive destination for these Nordic Skiers. This is higher than Canadian pleasure tourists as a whole that have been to any destination recently (51%).

British Columbia is more successful in attracting Nordic Skiers (34%) vis à vis the general travelling public in Canada (30%).

Quebec (64%) and **Ontario** (60%) are the main provincial competitors for Canadian Nordic Skiers. There are significantly more Nordic Skiers who have travelled to **Quebec** (64%) than have Canadian pleasure visitors to B.C. (24%) and Canadian travellers as a whole (39%).

Note to Readers

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

In other words, Canadian Nordic Skiers claim to have taken an overnight trip motivated by participating in Nordic Ski/related activities 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, Nordic Skiers may or may not have participated in Nordic Ski/related activities in a particular country, province or state they have visited recently for an overnight pleasure trip.

The **United States** clearly leads the International market (55%) but other foreign competitive destinations for Nordic Skiers include *Europe* (26%), the *Caribbean* (15%) and *Mexico* (13%).

TABLE 5: COMPETITIVE DESTINATIONS WORLDWIDE*	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
Canada			
Newfoundland & Labrador	4.8%	3.4%	4.3%
Prince Edward Island	8.9%	6.3%	7.2%
Nova Scotia	14.4%	10.8%	11.7%
New Brunswick	19.2%	9.0%	12.6%
Quebec	63.7%	23.8%	38.5%
Ontario	59.5%	40.2%	52.8%
Manitoba	9.1%	16.0%	9.1%
Saskatchewan	11.6%	23.2%	11.2%
Alberta	30.8%	57.2%	25.4%
British Columbia	34.1%	100%	30.1%
Yukon	2.2%	3.1%	1.0%
Northwest Territories	1.0%	1.8%	0.7%
Nunavut	1.2%	0.5%	0.3%
United States	54.6%	59.8%	50.6%
Other Countries/Regions			
Mexico	13.3%	18.6%	12.0%
South/Central America	7.5%	5.6%	4.8%
Caribbean	15.3%	14.2%	15.4%
Europe (Incl. the UK and Russia)	26.2%	18.7%	15.6%
Asia	6.9%	8.7%	5.5%
Australia/New Zealand/ Africa	3.8%	4.3%	2.9%
Destination patterns			
Only Canada.	32.6%	28.1%	35.6%
Canada & U.S.A. only	56.1%	54.5%	61.2%
Canada & Other Countries (Not USA)	45.4%	40.2%	49.4%
Canada. & Mexico only	33.9%	30.7%	37.3%
U.S.A. only	0.1%	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 Nordic Skiers the first consideration in planning their most recent **summer** trip was **destination** (42%) (see Table 8). At the same time, 1-in-5 begins with the **activities** they wish to participate in (19%) and on the **type of vacation experience** they wish to have (20%). 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%).

Unlike summer trips, when planning a **winter** trip most Canadian Nordic Skiers first consideration was the **activities** they wish to participate in (30%) followed by the **destination** (29%). 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 (13%).

Nordic Skiers put a premium on destination choice *per se*, with 7-in-10 claiming that it is *extremely* or *very important* to them (70%), 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	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
First Consideration for Most Recent Summer Trip			
Start with destination	41.5%	43.2%	37.8%
Start with activities	19.1%	9.6%	10.6%
Start with type of vacation experience	20.1%	18.4%	18.5%
Look for package deal (with out destination)	1.5%	1.1%	1.1%
First Consideration for Most Recent Winter Trip			
Start with destination	28.9%	32.5%	28.4%
Start with activities	30.2%	11.6%	9.1%
Start with type of vacation experience	12.9%	12.8%	11.4%
Look for package deal (with out destination)	1.6%	1.4%	1.9%
Importance of Destination			
Extremely/Very Important	66.9%	63.0%	62.1%
Extremely important	24.2%	23.9%	23.1%
Very important	42.7%	39.1%	39.0%
Average*	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

Nordic Skiers 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, Nordic Skiers put *feeling safe* (46%) at the top of their list (see Table 9). Over 4-in-10 Nordic Skiers place high importance on a destination that has *convenient access by car* (41%), whilst over 3-in-10 are interested in a destination that has *no health concerns* (37%) and has *many things for adults to see and do* (32%) and 1-in-4 require the availability of *camping* (25%) and *mid-range lodging* (25%).

Summary: Considerations Deemed *Highly Important* By At Least 1-in-4 Nordic Skiers¹⁴

	<u>Nordic Skiers</u>	<u>Canadian Pleasure Tourists</u>	
		<u>To British Columbia</u>	<u>Any Destination</u>
Feeling safe	45.7%	65.1%	65.9%
Convenient Access by Car	41.0%	36.2%	43.3%
No health concerns	37.0%	46.8%	49.9%
Lots for adults to see/do	32.0%	39.2%	38.0%
Camping	25.2%	13.9%	12.8%
Mid Range accommodation	24.7%	29.6%	29.6%

Nordic Skiers are more apt to take into account the *convenient access by car* (41%) and *camping* (25%) than are visitors to B.C. (36% and 14% respectively) or Canadian travellers as a whole (43% and 13% respectively). Although 1-in-5 Nordic Skiers indicated that *direct access by air* (21%) 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.).

Nordic Skiers are **less interested** in having *information available on the internet* (18%) than are visitors to B.C. (26%) or Canadian travellers as a whole (25%) and they are significantly less interested in having *great shopping* available (3%) than are visitors to B.C. (11%) or Canadian travellers as a whole (12%).

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

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

Having convenient access by train/bus, being familiar with the culture and language, having friends and relatives there, having luxury accommodation, great shopping and being disabled-person friendly, are not rated as being of high importance for Nordic Skiers.

TABLE 9: CONDITIONS FOR SELECTING A DESTINATION

	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
<i>Bold rows are proportion stating "Highly Important" In rank order by Nordic Skiers</i>			
Feeling safe	45.7%	65.1%	65.9%
Of no importance	5.6%	3.1%	3.5%
Convenient access by car	41.0%	36.2%	43.3%
Of no importance	13.8%	13.6%	11.5%
No health concerns	37.0%	46.8%	49.9%
Of no importance	13.2%	8.8%	8.2%
Lots for adults to see/do	32.0%	39.2%	38.0%
Of no importance	9.0%	7.2%	7.3%
Camping	25.2%	13.9%	12.8%
Of no importance	33.9%	48.7%	50.6%
Mid-range accommodation	24.7%	29.6%	29.6%
Of no importance	21.0%	12.6%	12.8%
Direct access by air	20.8%	31.6%	28.9%
Of no importance	28.3%	17.0%	21.7%
Budget accommodation	19.3%	21.5%	21.7%
Of no importance	23.5%	23.4%	23.8%
Information available on internet	18.3%	25.7%	24.6%
Of no importance	32.1%	24.7%	27.1%
Low cost packages available	12.7%	20.9%	22.8%
Of no importance	36.3%	27.3%	23.1%
Very different culture than own	12.5%	9.1%	8.9%
Of no importance	34.7%	39.6%	39.7%
Lots for children to see/do	11.0%	13.7%	16.4%
Of no importance	64.0%	62.0%	56.5%
Convenient access by train/bus	8.7%	11.4%	13.1%
Of no importance	48.0%	40.3%	39.3%
Familiar with culture & language	8.3%	10.8%	13.6%
Of no importance	37.1%	28.6%	26.9%
Have friends or relatives there	6.9%	10.2%	11.1%
Of no importance	65.5%	59.6%	59.0%
Luxury accommodation	4.7%	5.7%	6.8%
Of no importance	66.6%	57.5%	54.5%
Great shopping	2.8%	11.1%	12.3%
Of no importance	67.0%	45.0%	43.2%
Disabled-person-friendly	2.6%	3.6%	5.6%
Of no importance	82.1%	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 Nordic Skiers are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel; they accord B.C. a rating of 8.7 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 **Quebec** (8.1), **Hawaii** (7.8), **California** (7.4), **Alberta** (7.4), **Nova Scotia** (7.3) and **Prince Edward Island** (7.1).

Summary: Most Appealing Destinations among Nordic Skiers (with an average score of at least 7.0)¹⁶

	<u>Nordic Skier</u>	<u>Canadian Pleasure Tourists</u>	
		<u>To British Columbia</u>	<u>Total</u>
British Columbia	8.7	9.0	8.8
Quebec	8.1	6.7	9.0
Hawaii	7.8	8.1	8.3
California	7.4	7.4	8.4
Alberta	7.4	7.3	8.5
Nova Scotia	7.3	7.2	8.4
Prince Edward Island	7.1	7.2	8.3

British Columbia is given the highest rating as an appealing destination for pleasure travel, and less than 10% of Canadian Nordic Skiers 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). The challenge, of course, is getting these Nordic Skiers back to the province!

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.

TABLE 10: APPEAL OF VARIOUS DESTINATIONS

DESTINATIONS	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
<i>Bold rows are average ratings**</i>			
British Columbia	8.7	9.0	8.8
No rating provided	8.5%	2.1%	12.4%
Newfoundland & Labrador	6.9	6.8	7.9
No rating provided	18.7%	19.5%	21.5%
Nova Scotia	7.3	7.2	8.4
No rating provided	11.0%	14.5%	16.3%
New Brunswick	6.9	6.5	8.3
No rating provided	10.1%	16.8%	16.9%
Prince Edward Island	7.1	7.2	8.3
No rating provided	12.5%	15.5%	16.6%
Quebec	8.1	6.7	9.0
No rating provided	4.5%	11.1%	10.2%
Ontario	6.9	6.6	9.2
No rating provided	4.4%	8.0%	8.0%
Manitoba	4.7	4.8	7.9
No rating provided	15.5%	14.6%	21.1%
Saskatchewan	4.6	4.8	7.9
No rating provided	15.1%	13.4%	20.7%
Alberta	7.4	7.3	8.5
No rating provided	11.1%	6.8%	15.3%
Yukon	6.8	6.4	7.5
No rating provided	17.2%	19.5%	24.9%
Northwest Territories	6.1	5.8	7.4
No rating provided	18.1%	21.1%	25.7%
Nunavut	5.6	5.0	7.2
No rating provided	20.5%	24.3%	28.1%
New York State	6.5	6.2	8.4
No rating provided	10.3%	14.1%	16.0%
Colorado	6.9	6.1	7.6
No rating provided	16.8%	19.9%	24.5%
Florida	6.2	6.5	8.7
No rating provided	9.1%	12.2%	13.5%
California	7.4	7.4	8.4
No rating provided	10.9%	10.5%	16.0%
Hawaii	7.8	8.1	8.3
No rating provided	12.0%	12.5%	17.1
Arizona	6.6	6.5	7.8
No rating provided	18.3%	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 Nordic Skiers' lists for having *many good reasons* to visit on a pleasure trip (see Table 11).¹⁷ Specifically, **British Columbia** tops the list with over 7-in-10 Nordic Skiers 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 Nordic Skiers (74%) *many good reasons* to visit. Other destinations with many reasons to visit, according to Nordic Skiers, are Quebec (69%), Hawaii (53%), California (50%), Ontario (46%), and Alberta (46%).

Significantly more Nordic Skiers than Canadian pleasure tourists to B.C. and Canada, state that there are many good reasons to visit **Quebec** (69%) (visitors to B.C 35%; visitors to Canada 42%), **Yukon** (33%) (visitors to B.C 22%, visitors to Canada 17%) or the **North West Territories** (24%) (visitors to B.C 16%, visitors to Canada 12%).

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

<u>Nordic Skiers</u>	<u>Canadian Pleasure Tourists</u>				
		<u>To British Columbia</u>	<u>Total</u>		
B.C.	74%	B.C.	83%	B.C.	65%
Quebec	69%	Hawaii	56%	Hawaii	55%
Hawaii	53%	California	50%		
California	50%				

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

¹⁷ Consumers were asked to indicate which of three statements best described their feelings about taking a pleasure trip to the same destinations for which they rated *appeal* (see previous section). The statements were *there are NO good reasons to travel to this destination*, *SOME good reasons* and *MANY good reasons to travel to this destination*.

TABLE 11: NUMBER OF REASONS TO VISIT
VARIOUS DESTINATIONS

	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
<i>% stating "MANY" good reasons to visit In Rank order by Nordic Skiers</i>			
British Columbia	73.7%	83.4%	64.6%
Quebec	68.7%	35.3%	41.6%
Hawaii	53.2%	55.5%	54.6%
California	50.1%	49.8%	47.1%
Ontario	46.0%	35.4%	43.3%
Alberta	45.5%	45.3%	34.9%
Nova Scotia	38.1%	33.5%	32.4%
Newfoundland & Labrador	37.0%	30.3%	27.4%
New York State	35.5%	30.8%	30.4%
Yukon	32.5%	22.1%	16.9%
Prince Edward Island	32.5%	33.8%	32.0%
Florida	32.0%	35.0%	40.4%
Colorado	30.9%	17.8%	18.7%
New Brunswick	30.3%	21.3%	22.9%
Arizona	29.0%	22.1%	22.9%
Northwest Territories	24.4%	15.5%	12.3%
Nunavut	17.9%	11.0%	9.1%
Saskatchewan	7.3%	10.1%	7.7%
Manitoba	6.5%	8.6%	7.5%

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*.¹⁸

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 **participating in Nordic Ski and related activities** 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 participating in Nordic Ski and related activities 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* Nordic Skiers 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 Nordic Skiers provided in this chapter are appended (Table A3).

¹⁸ Presumably, “these trips” are those on which the specific activity took place.

B. Trip Activities & Drivers

1. Nordic Skiers' Cross-Over with Other Trip Activity Sectors

As demonstrated by their representation in other activity-based tourism sectors, Nordic Skiers are multi-dimensional travellers.¹⁹

2-in-5 Nordic Skiers are also **Hikers** (42%) and/or **Campers/RVers** (39%), over 1-in-3 are **travellers on a self-guided tour** (36%) and/or **Alpine Skiers** (33%), over 1-in-4 are **Cyclists/Mountain Bikers** (28%) and/or **History & Heritage Tourists** (28%) and 1-in-5 are **Anglers** (19%) (see Table 12).

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

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

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

¹⁹ 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 Nordic Skiers provided in this chapter are appended (Table A3).

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

	Nordic Skiers	All Canadian Pleasure Tourists		
	Total	To British Columbia	Any Destination*	Index to All Canadian Tourists** Nordic Skiers
Unweighted base	(836)	(7,788)	(23,156)	
Weighted, Projected	679,142	6,002,103	19,946,295	
<i>In Rank order by Nordic Skiers</i>				
Nordic Skiers	100%	3.8%	3.2%	n/a
Hikers	41.5%	9.4%	7.6%	546
Campers/RVers	39.4%	17.7%	16.1%	245
Self-Guided Overnight Touring Travellers	36.2%	22.4%	17.7%	205
Alpine Skiers	33.2%	14.9%	9.7%	342
Cycling/Mountain Biking	28.3%	4.8%	3.8%	745
History and Heritage Tourists	28.2%	12.2%	12.1%	233
Anglers	19.3%	10.9%	11.4%	169
Golfers	11.6%	7.2%	5.6%	207
Backcountry Lodge Guests	10.8%	2.6%	2.9%	372
Aboriginal Activity Tourists	10.6%	3.7%	2.8%	379
Sea Kayakers	7.3%	1.4%	0.8%	913
River Rafters	6.4%	1.6%	1.1%	582
Divers & Snorkellers	6.0%	3.4%	2.3%	261
Snowmobilers	5.1%	1.9%	2.5%	204

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/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. **Index calculation: Percentage Nordic Skiers in activity sector divided by All Canadian Pleasure (Any Destination) in activity sector, multiplied by 100.

2. Major Trip Activity Groups

Like most tourists, Nordic Skiers take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.²⁰

- In addition to taking trips to participate in Nordic Ski and other winter related activities nearly 4-in-5 Nordic Skiers (79%) take trips motivated by engaging in at least one **land-based outdoor activity**.
- Over 7-in-10 Nordic Skiers are motivated by **water-based activities** (71%).
- 3-in-5 Nordic Skiers stayed in an **accommodation** during a recent overnight pleasure trip (60%).
- Over 3-in-10 Nordic Skiers are motivated by **Performing Arts** (37%), attending **Exhibits/Historic Sites/Museums** (36%) as well as **Festivals and Events** (35%). A further 3-in-10 are motivated by **Theme parks and movies** (32%) and **shopping and dining-related** experiences (32%).

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, more Nordic Skiers *participated* in at least one performing arts experience while on a recent overnight pleasure trip (64%) than claim to have taken a trip motivated by one of these activities (37%). However, when it comes to outdoor land based activities the difference between *participation* rates (93%) and *motivation* rates (77%) is not as great as compared to the other categories.

Shopping and dining experiences are especially likely to be “one-of-many” trip activities (90%) but the driving force behind a trip for relatively few segment members (32%). Similarly, over 7-in-10 went on a recent trip to visit exhibits, historic sites and museums but only 3-in-10 took the trip in order to do so.

Compared to *all* Canadian overnight pleasure travellers, Nordic Skiers are six times as likely to identify winter outdoor activities, five times as likely to identify air-based activities, four times as likely to identify hands-on learning activities and three times as likely to identify aboriginal experiences, as ones that *motivated* recent trips (main reason).

They are twice as likely as *all* Canadian overnight pleasure travellers are, to identify land based activities, festivals and events, outdoor water-based activities, performing

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

arts, accommodation, theme/amusement parks and exhibits/historic sites and museums as ones that *motivated* recent trips (main reason).

Summary: Activities that are more than 3 times as likely to have motivated (main reason) a recent overnight trip for Nordic Skiers, compared to all Canadian Pleasure travellers.

<u>Major Activity Group</u>	<u>Main Reason</u>		<u>Any Participation</u>	
	Nordic Skiers	All Canadian Pleasure Tourists	Nordic Skiers	All Canadian Pleasure Tourists
Outdoor Winter Activities	100%	17%	100%	30%
Air-Based Activities	2%	0.3%	4%	1%
Hands-On Learning Activities	16%	4%	33%	13%
Aboriginal Experiences	11%	3%	23%	11%

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	Nordic Skiers	
	Main Reason	Any Participation
Unweighted base	(836)	(836)
Weighted, Projected	679,142	679,142
<i>In Rank order - Main Reason</i>		
Outdoor Winter Activities	100.0%	100.0%
Skiing – Cross Country	61.6%	67.8%
Snowshoeing	30.9%	37.9%
Skiing – Cross Country Overnight	19.7%	20.3%
Dog Sledding	9.4%	10.6%
Skiing – Ski Jouring	0%	0.4%
Outdoor Land Based Activities	78.6%	92.5%
Outdoor Water Based Activities	71.2%	90.0%
Accommodation Stayed at	59.6%	88.5%
Performing Arts	37.4%	64.1%
Exhibits/Historic Sites/Museums	36.2%	73.2%
Festivals & Events	34.9%	59.4%
Theme/Amusement Parks/Movies	32.0%	57.1%
Shopping/Dining/Food Related	31.5%	89.5%
Spectator Sports	19.2%	33.4%
Hands-on Learning Activities	16.1%	33.2%
Team Sports/Tournaments/Games	15.1%	28.8%
Aboriginal Experiences	10.6%	22.9%
Air Based Activities	1.6%	3.5%

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

3. Individual Trip Activities: The Outdoors

Many outdoor experiences are popular among Nordic Skiers (see Table 14).²¹ Although they particularly enjoy land-based activities, they are also partial to water-based activities. They like to be active while on vacation but they also enjoy taking time to enjoy themselves and relax in nature.

Land Based Activities:

- Nordic Skiers are especially interested in land-based travel experiences; about 3-in-10 go snowshoeing, alpine skiing or hiking and take trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them.
- Staying at a lakeside or riverside resort and cycling, are motivations for recent overnight pleasure trips for 2-in-10 Nordic Skiers.

Water based Activities:

- Water-based activities are also popular motivations for a recent overnight pleasure trips for Nordic Skiers, 3-in-10 enjoying sunbathing or sitting on a beach.
- 2-in-10 Nordic Skiers enjoy swimming in lakes or oceans and kayaking/canoeing, especially in fresh water.

Comparison to Canadian Pleasure Travellers

Compared to the typical Canadian overnight pleasure traveller, a Nordic Skier is more likely to identify passive outdoor activities such as sunbathing on a beach, and *active* ones such as alpine skiing, hiking, cycling, snowshoeing or 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 Nordic Skiers represent a distinctive market.

These Nordic Skiers participate in both summer and winter outdoor activities, in fact they are about thirty times more likely than Canadian pleasure travellers to go dog sledding, cross country skiing (day or night) and snowshoeing. They are over eight times more likely to go ocean kayaking, windsurfing, mountain biking, cycling (overnight touring trip) and/or mountain climbing/trekking and they are over six times

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 Nordic Skiers provided in this chapter are appended.

as likely to go rock climbing, horseback riding, cycling (day), freshwater kayaking, snorkelling in lakes/ivers, white water rafting and/or overnight hiking/backpacking than Canadian pleasure travellers.

Summary of Outdoor activities where Nordic Skiers are more than six times as likely than Canadian Pleasure Travellers to be motivated by (main reason) for a recent overnight trip.²² (In rank order from highest - dog sledding 31 times - to lowest, white water rafting 6 times more likely than Canadian Pleasure Travellers).

	<u>Main Reason</u>		<u>Any Participation</u>	
	Nordic Skiers	All Canadian Pleasure Tourists	Nordic Skiers	All Canadian Pleasure Tourists
Dog Sledding	9.4%	0.3%	10.6%	0.9%
Skiing – Cross Country	61.6%	2.1%	67.8%	6.0%
Skiing – Cross Country Overnight	19.7%	0.7%	20.3%	1.1%
Snowshoeing	30.9%	1.1%	37.9%	4.2%
Kayaking/Canoeing - Ocean	7.3%	0.8%	15.6%	3.9%
Cycling – Mountain biking	9.1%	1.0%	14.2%	4.0%
Windsurfing	0.9%	0.1%	3.4%	1.1%
Cycling – Overnight touring trip	8.9%	1.0%	9.8%	1.4%
Climbing – Mountain/trekking	10.1%	1.2%	12.7%	3.2%
Climbing – Rock climbing	3.1%	0.4%	5.7%	1.6%
Horseback riding - Same day	6.9%	0.9%	11.9%	4.7%
Cycling – Same day excursion	19.0%	2.8%	37.8%	11.0%
Kayaking/Canoeing - freshwater	25.2%	3.8%	38.5%	11.6%
Hiking/Backpacking overnight	26.8%	4.4%	29.4%	7.4%
Snorkelling in Lakes/ivers	1.8%	0.3%	6.0%	2.4%
Horseback riding - overnight	1.2%	0.2%	1.4%	0.4%
White water rafting	6.4%	1.1%	9.6%	2.7%

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

²² Not all of these activities are included in Table 14 because the activities presented in the summary table required that one-third of Nordic Skiers declare an activity as a main reason for an overnight pleasure trip.

TABLE 14: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN & ANY*	Nordic Skiers	
	Main Reason	Any Participation
Unweighted base	(836)	(836)
Weighted, Projected	679,142	679,142
<i>In Rank order - Main Reason</i>		
Skiing-Cross Country	61.6%	67.8%
Nature park	37.4%	55.0%
Sunbathing or sitting on a beach	32.4%	53.1%
Snowshoeing	30.9%	37.9%
Alpine Skiing	30.7%	34.0%
Hiking Same day excursion	30.4%	54.2%
Camping –Public campground	30.0%	51.2%
Swimming in lakes	25.8%	59.3%
Kayaking/Canoeing - Freshwater	25.2%	38.5%
Swimming in oceans	22.7%	43.3%
Lakeside/Riverside Resort (Lodging)	20.8%	36.8%
Cycling – Same day excursion	19.0%	37.8%
Ski/Mountain Resort (Lodging)	17.4%	34.2%
Well known natural wonders	16.9%	40.1%

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

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

By and large, Nordic Skiers 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.²³ Cultural and Heritage-oriented activities in general, and particularly performing arts and festivals and events are however, trip motivators for Nordic Skiers (see Table 15), attracting over 1-in-3 of these tourists.

Culture

Nordic Skiers 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, 1-in-2 have **strolled around a city to observe its buildings and architecture** on recent pleasure trips but less than 1-in-5 have taken a trip in order to engage in these activities. Similar patterns are evident for seeing well known **historic sites**. 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

Nordic Skiers are especially drawn to **going to the movies** (Main, 12%; Any, 38%), and attending **free outdoor performances** (Main, 11%; Any, 30%), as things to see and do on recent overnight pleasure trips. All of these entertainment-oriented experiences are much more commonly identified as *one among many* trip activities than as a main reason for taking a trip among Nordic Skiers.

Dining

Similar to many entertainment-oriented activities, dining out at **restaurants offering local ingredients and cuisine** (Main, 12%; Any, 66%), visiting **local outdoor cafes** (Main, 8%; Any, 58%), and dining in **high-end restaurants (not with an international reputation)** (Main, 6%; Any, 37%) are much more common trip experiences (any) than trip drivers (main) for Nordic Skiers.

Shopping

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

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 Nordic Skiers provided in this chapter are appended.

Sports

Close to 1-in-5 Nordic Skiers attend spectator-sporting events. The difference between *participation* rates (3-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, Nordic Skiers are more likely to engage in outdoor activities or take trips for these activities. These skiing enthusiasts are also more likely than the *typical* Canadian pleasure traveller to identify a wide range of cultural, entertainment and culinary activities as ones that *motivated* recent trips (main reason) or were engaged in on these trips (any participation).

Summary of other activities where Nordic Skiers are *five times* more likely than Canadian Pleasure Travellers to be *motivated by (main reason)* for a recent overnight trip. ²⁴ (In rank order from highest – International Film festival at 9 times - to lowest, Amateur Tournaments – Not Sports at 5 times more likely than Canadian Pleasure Travellers).

	<u>Main Reason</u>		<u>Any Participation</u>	
	Nordic Skiers	All Canadian Pleasure Tourists	Nordic Skiers	All Canadian Pleasure Tourists
<u>Other Activities</u>				
International Film festival	3.6%	0.4%	7.1%	1.8%
Literary Festivals or Events	3.1%	0.4%	4.1%	1.1%
Badminton	1.5%	0.2%	4.3%	1.9%
Wilderness Skills Courses	4.4%	0.6%	7.8%	1.4%
National/International Sports Event	3.6%	0.5%	5.3%	1.0%
Parachuting	1.2%	0.2%	1.6%	0.5%
Jazz Concert	6.3%	1.1%	12.7%	4.1%
Bowling	5.1%	0.9%	8.3%	3.8%
Interpretive Program	4.8%	0.9%	12.0%	4.7%
Tennis	2.1%	0.4%	6.5%	2.1%
Archaeological digs	1.5%	0.3%	2.5%	1.0%
Equine (Horse) Competitions	2.0%	0.4%	3.5%	1.2%
Hot Air Ballooning	0.5%	0.1%	1.2%	0.4%
Amateur Tournaments – Not Sports	2.5%	0.5%	3.9%	1.3%

Nordic Skiers are about twice as likely to be motivated to shop for antiques, local arts & crafts, books or music, dine at restaurants offering local ingredients, dine in an

²⁴ These activities are not included in Table 15 because the activities presented in the summary table required that one-third of Nordic Skiers declare an activity as a main reason for an overnight pleasure trip.

outdoor local café, visit historic sites, stroll around a city to see buildings, go to festivals and events, and to attend arts performances than are *typical* Canadian pleasure travellers. They are three times more likely to go to history/heritage museums, art galleries, free outdoor performances and go to the movies (as a main trip motivator), and they are four times more likely to participate in hands-on learning activities than are *typical* Canadian pleasure travellers.

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

TABLE 15: OTHER INDIVIDUAL ACTIVITIES –
MAIN & ANY*

	Nordic Skiers	
	Main Reason	Any Participation
Unweighted base	(836)	(836)
Weighted, Projected	679,142	679,142
<i>In rank order by main reason within each subgroup</i>		
Cultural & Heritage		
Any Performing Arts	37.4%	64.1%
Festival & Events	34.9%	59.4%
Strolling around a city to see architecture	18.9%	53.1%
Hands-on Learning Activities	16.1%	33.2%
Historic sites – well known	12.3%	41.7%
Art Galleries	12.3%	37.9%
Museum – History/Heritage	11.9%	35.5%
Historic sites – other	10.2%	34.8%
Sports		
Spectator Sports (Any)	19.2%	33.4%
Entertainment		
Movies/cinema	11.8%	38.3%
Free Outdoor performances	10.8%	29.6%
Food & Dining		
Dining – restaurants offering local ingredients and recipes	12.2%	65.8%
Local outdoor cafes	7.9%	58.2%
Dining - other high-end (not with international reputation)	5.7%	36.6%
Shopping		
Clothing, shoes, jewellery	10.8%	51.6%
Bookstores or music stores	7.0%	49.9%
Local arts & crafts studios	6.9%	47.6%
Antiques	6.0%	30.9%

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 Nordic Skiers as ones they participated in (any) on a recent overnight trip.

5. Overnight Cruises & Organized Group Tours

Most Nordic Skiers are not recent overnight cruise passengers (see Table 16). Of the 1-in-15 Nordic Skiers 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**, Nordic Skiers who have gone on an overnight-organized tour display a greater preference for tours to *multiple* (19%) versus *single* destinations (12%). They are also more likely to participate in these tours than are recent Canadian travellers to B.C. (single location 8%, multiple locations 12%) or any other destination (single location 8%; multiple locations 10%).

More Nordic Skiers claim to have taken **self-directed** same day touring trips over a two-year period (46%) than self-directed day tours that are not organized (36%).

Favoured themes for organized day excursions include tours around the countryside, wilderness or outdoor tours, city tours, and sightseeing cruises. Nordic Skiers are more than twice as likely to go to a winery/wineries and/or on wilderness or outdoor tours, as are *typical* Canadian pleasure travellers.

TABLE 16: CRUISES/GROUP TOURS	Nordic Skiers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
Took any overnight cruise in past 2 years			
Type of Cruise/Destination			
Ocean (Net)	6.8%	12.6%	8.8%
Ocean – Caribbean	2.8%	5.9%	5.3%
Ocean – Other	3.7%	5.1%	3.2%
Ocean – Alaska	1.0%	4.0%	1.7%
Lake or River cruise (Net)	8.3%	3.0%	4.4%
St. Lawrence River	5.5%	0.7%	1.9%
Other lake/River	3.1%	2.2%	2.3%
Great Lakes	1.0%	0.4%	0.8%
Touring			
Overnight group tour – multiple locations	18.7%	12.2%	10.2%
Overnight group tour – Single Location	11.6%	8.2%	7.9%
Organized group tour – same day	24.1%	28.3%	21.9%
Self-Directed tour – same day	45.7%	34.8%	28.6%
Self-Directed tour – not organized	36.2%	22.4%	17.7%
Unspecified same day tours	3.7%	1.9%	2.9%
Type of Organized Day Tour			
<i>(In rank order by Nordic Skiers)</i>			
Countryside	37.7%	26.4%	22.0%
Wilderness/outdoor	32.2%	15.6%	12.7%
City	31.9%	28.4%	22.9%
Sightseeing cruise (day excursion)	19.4%	15.9%	12.8%
Wineries	14.6%	8.7%	5.6%
Casino	8.3%	6.6%	6.5%
Factory	3.5%	4.2%	2.6%
Airplane/helicopter (pilot or passenger)	2.9%	3.0%	1.9%

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.

VII. Trip Planning

A. Who Does the Planning?

The majority of Nordic Skiers 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 Nordic Skier or is shared with other household members.

TABLE 17: TRAVEL PLANNING	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
Frequency of personal involvement in trip planning, past 2 years			
All	68.1%	65.9%	61.8%
Most	17.7%	16.7%	15.1%
Some	9.1%	9.6%	10.3%
None/not stated	5.1%	7.8%	12.8%
Main responsibility for trip planning			
Respondent	42.2%	37.8%	34.9%
Shared with other household member	31.8%	28.7%	27.6%
Spouse/partner	11.1%	15.0%	13.5%
Other/not stated/not involved in travel planning	11.5%	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 Nordic Skiers, the internet tops the chart (see Table 18). Over 7-in-10 of these tourists rely on the **internet** for travel information; over 6-in-10 on anecdotal information provided by **friends and relatives**, whilst 5-in-10 rely on their own **past experience**, 4-in-10 rely on **official DMO travel guides and maps**, and over 3-in-10 rely on **Visitor Information Centres, articles in newspaper/magazine and/or travel agents**. 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 Nordic Skiers (10%) 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 Nordic Skiers, Recent Pleasure Tourists to British Columbia and Any Destination

(In rank order in each column)

<u>Nordic Skiers</u>	<u>Canadian Pleasure Tourists</u>	
	<u>To British Columbia</u>	<u>Total</u>
Internet website	Internet website	Internet website
Advice of friends/relatives	Advice of friends/relatives	Advice of friends/relatives
Past experience	Past experience	Past experience
Official DMO travel guides	Maps	Travel Agent
Maps	Travel agent	
Visitor Information Centres		
Articles newspaper/magazine		
Travel Agent		

With most Nordic Skiers relying on the internet for travel planning and with over 1-in-2 saying that they *normally* visit **travel websites** (51%), the internet has the greatest reach for businesses catering to Nordic Ski/related activities in British Columbia. Nordic Skiers are more apt to watch **televised travel shows** (35%) than to read the **travel section** in their daily newspaper (23%).

General **travel magazines** such as *Condé Nast* are less popular (15%) than are **outdoor activities/sports magazines** such as *Backpacker* or *Outdoor Life* among Nordic Skiers (29%) but readership for both is higher amongst Nordic Skiers than it is for recent

visitors to B.C. or the Canadian travelling public as a whole. **News Magazines** and **General Interest** are the most popular magazines amongst Nordic Skiers (32% and 30% respectively).

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

TABLE 18: INFORMATION SOURCES FOR TRAVEL PLANNING & GENERAL MEDIA HABITS	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
<i>In rank order by Nordic Skiers</i>			
<u>SOURCES OF TRAVEL PLANNING INFO</u>			
Internet website	75.3%	67.2%	57.2%
Advice of friends/relatives	63.4%	52.4%	44.9%
Past experience	53.8%	52.1%	43.9%
Official DMO travel guides	47.3%	27.2%	22.7%
Maps	44.2%	39.0%	28.6%
Visitor information centres	38.4%	24.7%	20.5%
Articles in Newspaper/Magazine	35.9%	21.3%	18.4%
Travel agent	35.7%	36.0%	30.4%
Travel guide books	25.6%	18.1%	11.8%
Auto club	23.0%	19.9%	15.6%
Advertisements in Newspaper/Magazine	19.4%	12.8%	12.5%
Travel information in mail	13.3%	7.6%	7.8%
Television Programs	11.3%	9.0%	6.6%
Trade, travel, sportsmen's shows	9.5%	3.2%	2.7%
Television Advertisements	7.3%	4.0%	4.5%
Electronic newsletters via e-mail	5.4%	4.6%	3.7%
<u>TRAVEL MEDIA</u>			
Frequently read Travel Section daily newspaper	22.6%	21.1%	17.9%
Frequently read weekend edition of newspaper	29.2%	24.8%	21.9%
Magazines read in typical month (In rank order by Nordic Skiers)			
News magazine	31.6%	25.8%	23.6%
General Interest	30.2%	33.0%	30.7%
Outdoor activities/sports	28.7%	15.4%	12.6%
Home & Garden	27.2%	23.8%	24.5%
Food & Cooking	25.8%	26.2%	26.5%
Entertainment/Music	25.6%	31.1%	32.0%
Science and geography	25.0%	20.6%	16.3%
Fashion & Beauty	24.7%	21.6%	23.3%
Business/Finance	22.6%	19.0%	16.0%
Health, fitness and well living	22.4%	24.7%	21.7%
Magazines about your City	19.5%	14.4%	11.7%
Automobiles/Cycles	15.8%	13.7%	13.1%
Travel	15.4%	11.3%	11.5%
Normally watch Travel Shows on TV	35.4%	33.1%	30.3%
Normally visit Travel websites	51.0%	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, most Nordic Skiers and tourists who have taken a recent pleasure trip to British Columbia rely on the internet for travel planning. **Hotel/resort** sites (45%), **Destination marketing organization** sites (45%), **Airline** sites (33%) and **Travel** sites such as *Expedia* or *Travelocity* (32%) are the most commonly used websites among these Canadian tourists who rely on the internet for travel planning, whilst 1-in-3 tourists use **attractions** sites (30%) (see Table 19).

Not surprisingly, **booking** on-line is less common than is searching for information on the internet. Nonetheless, over 1-in-2 Nordic Skiers claim to have made a travel-related booking on-line over the past two years or so (50%). As their website preferences would suggest, the most common on-line bookings for Nordic Skiers is for **accommodation** (41%), followed by **air tickets** (33%) and, to a lesser degree, tickets for car rentals (15%) and attractions (11%).

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

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
Used Internet website for vacation information, past 2 years	75.3%	67.2%	57.2%
Internet website(s) used			
<i>(Among Users, in rank order by Nordic Skiers)</i>			
Hotel/resort	45.3%	40.2%	31.9%
Destination marketing organization	45.0%	34.4%	27.7%
Airline	32.5%	39.2%	25.8%
Travel planning/booking	31.5%	34.4%	25.6%
Attraction	30.0%	23.7%	19.1%
Cruise	5.5%	6.2%	4.5%
Motorcoach	2.7%	1.6%	1.4%
Other	24.1%	17.4%	15.4%
Any Internet Bookings in Past 2 Years	50.3%	49.2%	36.6%
<i>(Among All Overnight Pleasure Travellers)</i>			
Items Purchased On-Line			
<i>(Among Users, in rank order by Nordic Skiers)</i>			
Accommodation	40.5%	33.8%	25.2%
Air tickets	33.3%	39.2%	25.1%
Car rental	15.1%	16.5%	9.8%
Tickets for activities/attractions	11.1%	11.9%	8.5%
Rail, bus, boat tickets	9.5%	8.7%	5.6%
Package deal (2+ items)	6.3%	7.7%	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 Nordic Skiers (see Table 20). 1-in-20 say they relied on a package deal for *all* or *most* of their trips over the past two years or so (2004 or 2005) and a further 1-in-3 have used package deals for *one* or *some* of these trips.

Nordic Skiers who purchase packages want them to include accommodation (85%) and transportation to the destination (70%). Somewhat fewer would like the package to include food and beverages (50%), transportation at the destination (47%) and tickets for activities and attractions (41%).

TABLE 20: PACKAGE DEALS	Nordic Skiers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
	Total	(7,788)	(23,156)
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
Frequency of Purchasing Packages in Past 2 Years			
Most/all trips	4.9%	5.9%	7.1%
One/some trips	30.5%	27.0%	23.9%
No trips/not stated/not sure	64.5%	67.1%	68.9%
Desired Components of Packages (Among Purchasers of Packages)			
<i>In rank order by Nordic Skiers</i>	(100%)	(100%)	(100%)
Accommodation	84.9%	84.4%	81.4%
Transport to destination	69.8%	80.2%	72.2%
Food and beverage	49.7%	48.5%	52.2%
Transport at destination	47.2%	51.9%	49.8%
Tickets for activities/attractions	40.7%	43.1%	45.2%
Other	11.8%	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 over 6-in-10 Nordic Skiers is a **break from the day-to-day environment** and the ability to **relieve stress** (see Table 21).²⁵

Over 5-in-10 Nordic Skiers want to do **something new and/or different** while on vacation, or to help **enrich familial relationships**, and be the basis of lasting **memories**, whilst 4-in-10 are interested in **abandoning a fixed schedule**. 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 Nordic Skiers and Recent Pleasure Tourists to British Columbia and Any Destination²⁶

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

While not as widely endorsed as those cited above **enriching their perspectives on life, keeping family ties alive, gaining knowledge of history, other cultures or other places and being physically challenged**²⁷, are important benefits of pleasure travel experiences for over 3-in-10 Nordic Skiers. Around 1-in-4 are interested in **stimulating their minds or being intellectually challenged**, and 1-in-5 are motivated by renewing **connections with people (other than family)**. Benefits with low appeal to Nordic Skiers include the opportunity to experience **solitude and isolation, having stories to tell** once the trip is over and **being pampered**.

²⁵ 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*.

²⁶ For full array, see Table 21.

²⁷ To be challenged physically/feel physically energized.

TABLE 21: BENEFITS SOUGHT FROM PLEASURE TRAVEL	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
<i>% Stating "Highly Important"</i>			
<i>In rank order by Nordic Skiers</i>			
Break from day-to-day environment	66.9%	66.5%	66.8%
Relax/relieve stress	61.6%	65.0%	65.4%
See/do something new/different	57.6%	49.3%	44.0%
Enrich relationship with partner/children	53.5%	54.5%	52.8%
Create lasting memories	50.5%	55.6%	52.3%
No fixed schedule	44.9%	42.8%	47.8%
Enrich perspectives on life	38.6%	31.9%	27.7%
Keep family ties alive	37.7%	43.6%	43.5%
Knowledge of history, cultures, places	34.1%	27.7%	24.3%
Physical challenge	32.1%	18.1%	15.7%
Stimulate mind/intellectual challenge	24.8%	19.3%	17.4%
Renew personal connections (non-family)	18.9%	20.3%	18.9%
Solitude and isolation	14.9%	8.9%	9.3%
Stories to share	13.1%	12.4%	12.9%
To be pampered	9.2%	9.9%	13.3%

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 Nordic Skiers say that they have taken an overnight pleasure trip during the summer months (96%), 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 Nordic Skiers take winter trips (87%) 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	Nordic Skiers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
Unweighted base	Total (836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
Took Overnight Pleasure Trip in Past 2 Years			
In . . .			
Summer	95.5%	89.7%	86.4%
Winter	87.3%	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

Auto club membership is characteristic of 2-in-5 Nordic Skiers (40%) (see Table 23). Over 3-in-10 claim to have memberships in sports club (34%) and over 1-in-4 are members of a frequent flyer program (28%)

Compared to the Canadian travelling public as a whole and recent visitors to British Columbia, Nordic Skiers' memberships are higher, with the exception of auto clubs, hotel/car rental programs and frequent flyer programs which are lower than recent visitors to British Columbia.

TABLE 23: MEMBERSHIPS	Nordic Skiers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
<i>In rank order by Nordic Skiers</i>			
Auto club	40.0%	46.5%	38.3%
Sports club	33.8%	28.9%	23.5%
Frequent flyer program	27.7%	38.3%	25.7%
Community service club	14.4%	11.2%	10.7%
Nature/environmental club	13.2%	4.6%	3.5%
Hotel/car rental loyalty program	10.0%	14.0%	8.8%
Hobby club	9.7%	5.4%	4.6%
Book/reading club	5.5%	5.4%	4.9%
Travel club	3.5%	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 6-in-10 Canadian Nordic Skiers have taken a camping trip in the past two years (63%). Of these Nordic Skiers that camp, they use a *tent* most often for shelter on recent camping trips (47.9%) to a much greater extent than they rely on a *motor home or RV* for shelter (2.2%).

Use of tents among Nordic Skies (48%) who go camping, is significantly higher than is the case among typical Canadian tourists who have been camping (25%) and those who have recently travelled to British Columbia (28%).

	Nordic Skiers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
Took Camping Trip in Past Two Years (2004 and 2005).	63.1%	46.2%	40.0%
<i>In rank order by Nordic Skiers</i>			
Tent	47.9%	28.2%	25.4%
Travel trailer/fifth wheel	5.4%	7.1%	6.0%
Truck camper or van	3.8%	3.3%	2.0%
Tent trailer	3.7%	2.7%	3.2%
Motor home or RV	2.2%	5.0%	3.4%

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 Nordic Skiers (89%) 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 Nordic Skiers while on vacation. Over 1-in-2 Nordic Skiers have stayed at a public campground (51%), while 3-in-10 have camped in a private campground (29%) and 1-in-4 in a wilderness setting (25%).

More Nordic Skiers stay at a lakeside/riverside resort (37%) and a ski resort or mountain resort (34%) than at a seaside resort (29%).

1-in-6 Nordic Skiers have stayed at a wilderness lodge (accessible by car) (16%), while 1-in-28 have stayed at a remote/fly-in wilderness lodge (4%) and 1-in-67 have stayed at a remote/fly-in wilderness outpost (2%).

TABLE 25: LODGING USED WHILE ON AN OVERNIGHT PLEASURE TRIP IN PAST TWO YEARS (2004 and 2005)	Nordic Skiers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
	Total		
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
<i>In rank order by any participation within each subgroup (Nordic Skiers)</i>			
Used Any Lodging	88.5%	73.4%	63.8%
Camping			
Public campground in national/provincial/state park	51.2%	32.8%	25.8%
Private Campground	29.2%	22.9%	18.4%
Campsite in wilderness setting	24.8%	12.1%	8.4%
Resort/Spa			
Lakeside/riverside resort	36.8%	26.6%	22.1%
Ski resort or mountain resort	34.2%	23.8%	13.6%
Seaside Resort	29.1%	26.5%	20.3%
Health Spa	13.7%	6.9%	5.8%
Backcountry Lodge/Outpost			
Wilderness Lodge By Car	15.5%	5.6%	5.5%
Remote/Fly-In Wilderness Lodge	3.6%	2.7%	1.6%
Remote/Fly-In Wilderness Outpost	1.5%	1.0%	0.6%
Farm or guest ranch	7.2%	4.5%	2.9%
Motorhome/RV while touring (not camping)	6.6%	7.0%	4.5%
Houseboat	3.2%	2.5%	1.4%

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 Nordic Skiers have regular access to **cottages and/or cabins** (44%) than do recent visitors to British Columbia (32%) do and the Canadian travelling public as a whole (33%). Nordic Skiers' access to cottages and/or cabins in their home province (38%) is significantly higher than recent visitors to British Columbia (25%) and the Canadian travelling public as a whole (28%).

Over 3-in-10 Nordic Skiers own canoes or kayaks (32%); ownership of this type of equipment is appreciably higher among Nordic Skiers than it is among recent visitors to British Columbia (17%) and the Canadian travelling public as a whole (15%). This is evidence of their preference for staying at riverside or lakeside resorts.

TABLE 25: RECREATION OWNERSHIP	Nordic Skiers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
	Total		
Unweighted base	(836)	(7,788)	(23,156)
Weighted, Projected	679,142	6,002,103	19,946,295
<i>In rank order by Nordic Skiers</i>			
Cottage/Cabin			
Cottage/cabin regular access	44.4%	32.1%	32.8%
Cottage/cabin in home province	38.3%	25.0%	27.9%
Cottage/cabin other province	8.3%	8.1%	4.8%
Cottage/cabin outside Canada	1.9%	3.4%	3.1%
Canoe/kayak	32.0%	17.3%	15.4%
Motor boat	18.2%	17.2%	17.0%
Motor home, camper, RV	13.9%	19.8%	15.3%
Snowmobile	10.4%	7.3%	10.0%
All-terrain vehicle (ATV)	9.9%	11.3%	12.9%
Sailboat	5.1%	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 ²⁸	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.

²⁸ 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%
Camping - Public campground	13.2%	32.8%	11.6%	25.8%
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%
Ski/Mountain Resort (Lodging)	9.1%	23.8%	5.3%	13.6%
Lakeside/Riverside Resort	8.1%	26.6%	7.4%	22.1%
Swimming in oceans	6.8%	33.0%	8.4%	28.2%
Well known natural wonders	6.8%	31.2%	6.3%	23.8%
Hiking - same day excursion	6.5%	33.1%	5.3%	23.8%
Kayaking/Canoeing - Freshwater	3.3%	11.9%	3.8%	11.6%
Cycling – Same day excursion	3.1%	13.7%	2.8%	11.0%
Snowshoeing	0.9%	4.4%	1.1%	4.2%
Skiing- Cross Country	2.6%	7.7%	2.1%	6.0%

Source: TAMS Canadian Special Tabulations, prepared for Tourism British Columbia. **Activities shown here are those that are named by at least 1-in-3 Nordic Skiers 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%
Museums – History/Heritage	3.7%	29.7%	3.9%	23.1%
Sports				
Spectator Sports (Any)	15.3%	33.8%	13.4%	27.5%
Entertainment				
Movies/cinema	3.2%	33.9%	3.7%	27.9%
Free Outdoor performances	2.6%	18.5%	3.4%	17.1%
Shopping				
Clothing, shoes, jewellery	5.5%	63.7%	6.9%	57.0%
Bookstores or music stores	2.9%	51.7%	3.4%	41.4%
Local arts & crafts studios	2.8%	47.3%	3.1%	37.5%
Antiques	1.6%	28.3%	2.1%	23.5%
Food & Dining				
Dining – restaurants offering local ingredients and recipes	4.2%	65.1%	5.5%	57.1%
Dining - other high-end (not with international reputation)	2.6%	33.8%	2.8%	27.3%
Local outdoor cafes	2.4%	48.6%	2.8%	38.9%

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