



RESEARCH & PLANNING

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

Focus on Recreational Cycling and Mountain Biking

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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
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I. Executive Summary

RECREATIONAL CYCLISTS AND MOUNTAIN BIKERS ARE A NICHE MARKET FOR BRITISH COLUMBIA

At over 700,000, *Cyclists and Mountain Bikers* – Canadian adults who take vacations *in order to go Cycling and/or Mountain Biking* – are an important tourism market. They represent 1-in-26 of the 20 million Canadian overnight pleasure travellers to *any destination* and 1-in-20 of the 6 million Canadians who have come to British Columbia for a vacation in the past two years or so.

BRITISH COLUMBIA ATTRACTS MOUNTAIN BIKERS AND CYCLISTS AT A HIGHER THAN AVERAGE RATE.

While a small niche market, Mountain Bikers are nearly twice as likely to have travelled to British Columbia recently as would be expected given their share of the total Canadian pleasure travel market, whilst Cyclists (overnight) are more than one and half times as likely and Cyclists (same day) are only slightly more likely to have travelled to British Columbia recently (compared to Canadian pleasure visitors as a whole). At approximately 288,960, this sector represents about five percent of the 6 million Canadian adults with pleasure travel experiences in British Columbia during 2004 or 2005.

BRITISH COLUMBIA ATTRACTS MORE MOUNTAIN BIKERS THAN CYCLISTS.

Mountain Bikers are nearly twice as likely, whilst Cyclists (same day or overnight) are only slightly more likely to have travelled to British Columbia recently. At approximately 229,352, Cyclists (same day or overnight) represents about four percent of the 6 million Canadian adults with pleasure travel experiences in British Columbia over a two-year period, whilst at 112,851, Mountain Bikers represents about two percent (of the 6 million Canadian adults with pleasure travel experiences in British Columbia over a two-year period). British Columbia has attracted 55% of the Canadian mountain biking market and 35% of the Canadian cycling (day/night) market.

THEY LIVE IN EVERY CANADIAN PROVINCE BUT ARE CONCENTRATED IN THE LARGER CITIES.

Cyclists and Mountain Bikers 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 British Columbia, Quebec and Ontario.

Cycling seems to be particularly popular among pleasure tourists who reside in the larger cities such as Montreal, Toronto and Vancouver. Vancouver is home to about 1-in-12 adult Canadians but significantly more Mountain Bikers (1-in-7) live in the city. In contrast, Cyclists and Mountain Bikers are less likely to live in the Maritimes and the Prairie Provinces.

Marketing efforts to attract Cyclists and Mountain Bikers may be facilitated by their concentration in the larger cities which have easier access (flights) to British Columbia.

MOUNTAIN BIKERS ARE YOUNGER AND CYCLISTS ARE OLDER.

Mountain Bikers tend to be concentrated at the younger end of the age spectrum. 1-in-5 of them are young adults (18 to 24 years), 1-in-4 are between 25 to 34 years of age and 35 to 44 years of age. Under one-fifth are in their mid-forties to mid-fifties and one-tenth are in their mid-fifties to mid-sixties. Only 1-in-52 Mountain Bikers are 65 years of age or older.

Cyclists, in contrast, are more concentrated at the older end of the age spectrum. Over half of these tourists are 45 years or older and over one-quarter are aged 45 to 54 years old.

CYCLISTS AND EVEN MORE MOUNTAIN BIKERS ARE PREDOMINATELY MALE

Men are more likely to be Cyclists than are women but Mountain Bikers are predominately male (75.5%), with woman representing only one-quarter of the market.

CYCLISTS AND MOUNTAIN BIKERS ARE EDUCATED AND AFFLUENT.

Tourists in this niche market tend to be more educated (about two-thirds of Cyclists and Mountain Bikers have a post-secondary diploma or University degree), are more apt to be full-time paid employees (over one-half of Cyclists and Mountain Bikers) and to be more affluent (one-quarter of Cyclists and over one-third of Mountain Bikers fall within the \$100,000+ bracket) than are typical Canadian pleasure tourists.

1-IN-2 CANADIAN MOUNTAIN BIKERS HAVE BEEN TO BRITISH COLUMBIA ON A RECENT OVERNIGHT PLEASURE TRIP.

British Columbia is especially successful in attracting Cyclists (35.2%) and Mountain Bikers (55.2%) vis à vis the general travelling public in the Canada (30.1%), however it shares this distinction with Quebec and Ontario. In fact, **Ontario** is the main provincial competitor for Canadian Mountain Bikers (58.1%) and Quebec is the main provincial competitor for Canadian Cyclists (62.1%). The **United States** clearly leads the International market (3-in-5 Cyclists and Mountain Bikers) but other foreign competitive destinations for Cyclists and Mountain Bikers include *Europe, the Caribbean and Mexico*.

A SAFE DESTINATION IS A PRIORITY.

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

CYCLISTS AND MOUNTAIN BIKERS ARE MULTI-DIMENSIONAL TRAVELLERS BUT TEND TO BE OUTDOOR TOURISTS.

There is considerable overlap between Cyclists and Mountain Bikers and other outdoor sectors of interest to tourism businesses in British Columbia.² As demonstrated by their representation in other activity-based tourism sectors, Cyclists and Mountain Bikers are multi-dimensional travellers.

2-in-5 Cyclists are also **Hikers** and/or **Campers/RVers**, around 3-in-10 are **Travellers on Self-Guided Overnight Tours, Alpine Skiers** and/or **History/Heritage Tourists**, and around 1-in-4 are **Nordic Skiers** and/or **Anglers**.

Nearly one-half of Mountain Bikers are also **Campers and RVers**, about 2-in-5 are **Alpine Skiers** and/or **Hikers**, 3-in-10 are **Nordic Skiers** and/or are **Travellers on Self-Guided Overnight Tours History/Heritage Tourists**, and 1-in-4 are **Anglers**.

² Sectors are defined in terms of selective activities as the main reason for a trip because these “dedicated” markets represent a crystallization of the interests and characteristics that might attract more casual participants to the activity (any participation). Fifteen sectors were selected by Tourism British Columbia for the purposes of this project. These sectors do not represent the full range of sectors in the British Columbian tourism industry. See the Appendix for a list of sectors and their definitions.

Their predisposition toward outdoor activities is evident in the fact that compared to the Canadian travelling public as a whole; **Cyclists** are seven times as likely to be Nordic Skiers, six times as likely to be Sea Kayakers and five times as likely to be Hikers. Cyclists are more than twice times as likely as the Canadian travelling public as a whole, to take trips in order to go Alpine Skiing, to be Backcountry Lodge Guests, go river rafting, or to obtain Aboriginal cultural experiences, as well as go diving/snorkelling, go camping/RVing, or obtain history and heritage experience, go golfing and/or fishing.

Mountain Bikers are more than nine times as likely as the Canadian travelling public as a whole to take trips in order to be Nordic Skiers. They are than six times as likely to be River Rafters, five times as likely to be Hikers, four times as likely to be Divers/Snorkellers, Alpine Skiers and/or Sea Kayakers and three times as likely to be Snowmobilers. They are also more than twice as likely as the Canadian travelling public as a whole, to take trips in order to go camping/RVing, obtain Aboriginal cultural experiences, and/or to go fishing.

MANY OUTDOOR EXPERIENCES ARE POPULAR AMONG CYCLISTS AND MOUNTAIN BIKERS.

Their higher level of engagement with the outdoors on trips vis à vis the typical Canadian tourist suggests that these cycling enthusiasts represent distinctive markets. Although they particularly enjoy land-based activities Cyclists and Mountain Bikers 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. Mountain Bikers are more apt to be motivated by and participate in more rigorous outdoor activities, than are Cyclists.

Mountain Bikers land based outdoor interests include taking trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them, go alpine skiing and/or go hiking.

Cyclists land based outdoor interests include taking trips to visit a national, provincial or state nature parks, go alpine skiing and/or go hiking.

Water based activities are also popular motivations for recent overnight pleasure trips for **Mountain Bikers**, activities include swimming in lakes, enjoying sunbathing or sitting on a beach, and/or fishing, especially in fresh water.

Cyclists Water based activities include enjoying sunbathing or sitting on a beach, swimming in lakes and oceans, and/or fishing, especially in fresh water.

CYCLISTS AND MOUNTAIN BIKERS ARE NOT ESPECIALLY DRIVEN TO TAKE CULTURAL, CULINARY OR SHOPPING TRIPS.

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

About one-half of Cyclists and Mountain Bikers have sought out have sought out a well-known historic site, or strolled around a city to observe its buildings and architecture on recent pleasure trips but one-quarter have taken a trip in order to engage in these activities. Perhaps because they tend to live in families with children, Mountain Bikers are particularly apt to take a trip to go to an **amusement park**.

Going to **movies** is a popular trip activity (*any*) among about two-fifths of Cyclists, and over one-half of Mountain Bikers. **Free outdoor performances** attract one-third of Cyclists and Mountain Bikers and **Firework displays** attract just under one-third of Cyclists and Mountain Bikers.

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

Shopping for apparel, local arts and crafts and books or music, is a common trip pastime for Cyclists and Mountain Bikers 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 of these tourists rely on the **internet** for travel information, 6-in-10 rely on anecdotal information provided by **friends and relatives**, over 5-in-10 rely on their own **past experience** and over 4-in-10 rely on **maps** and **Visitor Information Centres**. About one-third rely on **official DMO travel guides**, **travel agents** and **newspapers** to obtain travel information. In the main, these are the same sources of information that may be influencing Canadian pleasure travellers who have recently done so, to take trips to British Columbia.

CYCLISTS AND MOUNTAIN BIKERS HAVE VERY FAVOURABLE IMPRESSIONS OF BRITISH COLUMBIA.

Canadian Cyclists and Mountain Bikers are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel. Cyclists accord B.C. a rating of 8.7 and Mountain Bikers and even higher rating of 9.2 on a ten-point scale. Though significantly lower than B.C.'s, moderately favourable ratings are accorded a host of destinations, including **Hawaii** (7.8 Cyclists; 7.7 Mountain Bikers), **Quebec** (7.8 Cyclists; 7.2 Mountain Bikers), **California** (7.5 Cyclists; 7.1 Mountain Bikers), **Alberta** (7.2 Cyclists; 7.4 Mountain Bikers), **Nova Scotia** (7.1 Cyclists; 7.0 Mountain Bikers) and **Prince Edward Island** (7.1 Cyclists; 6.8 Mountain Bikers).

British Columbia is given the highest rating as an appealing destination for pleasure travel, and less than one-tenth of Canadian Cyclists and Mountain Bikers refrained from rating the province, thus indicating that Canadian travellers are knowledgeable about the destination and its touristic appeal.

IMAGE BUILDING IS THE KEY CHALLENGE.

With their particular constellation of outdoor interests, Canadian Cyclists and Mountain Bikers seem an ideal market for the province. At present, however, the province is attracting only about five percent of this market, suggesting that until more of them are aware of the cycling, mountain biking and other outdoor activities British Columbia can offer, they may not explore beyond competing destinations in Canada and elsewhere in the world.

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II. Introduction

A. Background and Objectives

The TAMS survey examines the recreational activities and travel habits of Canadians and Americans. The survey examines out-of-town, overnight travel behaviour of one or more nights over the past two years and provides detailed information on Travellers'

activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

TAM 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 (TAMS).³

- River Rafters
- Backcountry Lodge Guests
- **Recreational Cyclists/Mountain Bikers**
- History and Heritage Tourists
- Snowmobilers
- Divers & Snorkellers
- Nordic Skiers & Other Non-Alpine Winter Sport Participants⁴
- Golfers
- Alpine Skiers
- Aboriginal Activity Tourists
- Anglers
- Self-Guided Overnight Touring Travellers
- Hikers
- Campers/RVers

Even though these profiles span a wide range of tourism experiences, it is recognized that they cover only a fraction of the experiences British Columbia offers its tourists. This profile describes **Recreational Cyclists and Mountain Bikers** (hereafter referred to as **Cyclists/Mountain Bikers**).

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

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

B. The Canadian Cyclists and Mountain Bikers Report

For purposes of this report, Canadian **Cyclists** and **Mountain Bikers** are Canadian adults (18 years of age or over) who claim to have taken an overnight pleasure trip to any destination in the past two years⁵ and indicate that one or more of the following was the **main reason** for at least one of the overnight trips they took over this same time period.

Main Reason for Trip

- ❖ *To participate in Recreational cycling – as a same day excursion*
- ❖ *To participate in Cycling – as an overnight touring trip*
- ❖ *To participate in Mountain biking*

Note to Readers

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

In other words, Canadian Cyclists and Mountain Bikers claim to have taken an overnight trip motivated by cycling/mountain biking 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, Cyclists and Mountain Bikers may or may not have participated in cycling/mountain biking in a particular country, province or state they have visited recently for an overnight pleasure trip.

Over the last two years, over 10% (2,494,384) of adult Canadians went cycling (all activities) while on an out-of-town, overnight trip of one or more nights. Cycling was the tenth most common outdoor activity pursued by Canadian Pleasure Travellers during that time. Recreational cycling as a same day excursion (8.3%) was the most common type of cycling activity undertaken while on a trip. Mountain biking (3.0%) was the next most popular activity followed by overnight touring (1.0%). 0.3% of adult Canadians (71,616) participated in all three cycling activities when on trips taken during the past two years.⁶

People who take a trip *in order to go cycling/mountain biking* are only a fraction of tourists who go *cycling/mountain biking* on their vacations. Of the 2.5 million Canadian pleasure travellers who cycled on at least one overnight pleasure trip, 8-in-10 participated in recreational same day cycling excursions (82.9%), 3-in-10 mountain

⁵ Since fieldwork for the TAMS study was conducted between January and June 2006, the “past two years” likely refers to 2004 and 2005. It is important to note, however, that when asked to report travel activities over a two-year period, consumers are prone to imprecision by focussing on “salient trips” (most memorable, most expensive, etc.) and/or by “telescoping” the specified time period (extending the time frame over which trips are reported beyond the specified two years). In light of this potential imprecision, a liberal interpretation of the “reference period” is advised. Throughout this report, the terms “past two years or so” and “recent” are commonly used to describe the “past two year” recall period.

⁶ See *Travel Activities and Motivations of Canadian Residents: Activity Profile, Cycling While on Trips*, Tourism BC, December 2007 http://www.tourism.bc.ca/pdf/TAMSCan2006_Cycling_TBC_Lang.pdf

biked (30.2%) and 1-in-10 cycled as part of an overnight touring trip (8.5%).⁷ Of these 2.5 million Canadian tourists, over 700,000, (28.4%) say they took a trip *in order to go cycling/mountain biking*. Those who went on an overnight touring trip (69.4%) were much more likely than those who went recreational cycling (25.1%) or mountain biking (24.8%) to report that this activity was the main reason for taking at least one trip over the last two years.⁸

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

The report provides the following information:

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

⁷ See *Travel Activities and Motivations of Canadian Residents: Activity Profile, Cycling While on Trips*, Tourism BC, December 2007 http://www.tourism.bc.ca/pdf/TAMSCan2006_Cycling_TBC_Lang.pdf

⁸ See *Travel Activities and Motivations of Canadian Residents: Activity Profile, Cycling While on Trips*, Tourism BC, December 2007 http://www.tourism.bc.ca/pdf/TAMSCan2006_Cycling_TBC_Lang.pdf

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).⁹ 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.¹⁰ They may have been on a vacation or visiting friends and relatives while on their pleasure trip to the province. Of overnight travellers who took trips for any reason, just under one-third claim to have visited British Columbia in the past two years or so (30.1% or 6.0 million).

TABLE A: OVERVIEW OF BRITISH COLUMBIA'S MARKET SIZE	Recent Canadian Pleasure Travellers Any Destination	
Unweighted base	(23,156)	
Weighted base	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 sectors¹¹ 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 and overnight pleasure trip to/in British Columbia over the two-year period (6 million).¹²

⁹ Adults are defined as individuals 18 years of age or older.

¹⁰ 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.

¹¹ 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.

¹² 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 Size¹³

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.¹⁴ Examples of these niche markets include **River Rafters** and **Sea Kayakers**. Each of these sectors represents approximately 1-in-100 Canadian overnight pleasure travellers [see Table B].

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

TABLE B: OVERVIEW OF SELECTED SECTOR MARKET SIZE	Canadian Overnight Pleasure Travellers In Past 2 Years				
	Any Destination		British Columbia		Index**
Unweighted base	(23,156)		(7,788)		
Weighted, Projected	19,946,295		6,002,103		
<i>In Rank Order by Tourists to British Columbia</i>					
Self-Guided Overnight Touring Travellers	3,531,758	17.7%	1,345,572	22.4%	127
Campers/RVers	3,205,733	16.1%	1,062,448	17.7%	110
Alpine Skiers	1,942,803	9.7%	896,103	14.9%	154
History and Heritage Tourists	2,420,162	12.1%	731,231	12.2%	100
Anglers	2,277,825	11.4%	651,917	10.9%	96
Hikers	1,523,989	7.6%	565,180	9.4%	124
Golfers	1,109,796	5.6%	431,021	7.2%	129
Recreational Cyclists/Mountain Bikers	761,808	3.8%	288,960	4.8%	126
Cyclists – Same Day Excursion	554,986	2.8%	183,262	3.1%	110
Cyclists – Overnight Tour Trip	195,948	1.0%	98,653	1.6%	160
Mountain Bikers	204,369	1.0%	112,851	1.9%	190
Nordic Skiers	632,917	3.2%	225,129	3.8%	119
Aboriginal Activity Tourists	564,047	2.8%	220,826	3.7%	132
Divers & Snorkellers	459,261	2.3%	202,907	3.4%	148
Backcountry Lodge Guests	578,207	2.9%	155,296	2.6%	90
Snowmobilers	498,926	2.5%	112,498	1.9%	76
River Rafters	215,481	1.1%	98,220	1.6%	145
Sea Kayakers	153,231	0.8%	84,351	1.4%	175

Source: Canadian TAMS Special Tabulations prepared by Tourism British Columbia

¹³ Does not represent all participants in this activity, but instead represents those who were motivated to travel to participate in this activity.

¹⁴ Sample sizes of less than 100 records for tourists with recent pleasure trips in British Columbia are not sufficiently robust to warrant analysis.

TABLE B: OVERVIEW OF SELECTED SECTOR MARKET SIZE	Canadian Overnight Pleasure Travellers In Past 2 Years	
	Any Destination	British Columbia
Unweighted base	(23,156)	(7,788)
Weighted, Projected	19,946,295	6,002,103

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

In contrast, trips driven by interests in **History and Heritage, Camping and RVing** or **Self-Directed Touring, Alpine Skiing** and **Angling** are more widespread, representing more than 1-in-10 Canadian overnight pleasure tourists and considerably higher proportions of those who have recently visited British Columbia.

An index that compares the proportion of *all* Canadian tourists in a sector to British Columbia's share is displayed in Table B. In this type of index, "100" is the baseline, representing what British Columbia's share would be if the province were attracting a sector's members at the same rate as the sector members occur in the Canadian overnight pleasure travel market. The province's success in attracting visitors within a sector is evident in the extent to which its index score is greater than 100. Conversely, British Columbia's relative weakness would be evident in the extent to which a score is less than 100.

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

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

C. Tourism Activity Sector Cross-Over

Travellers take different trips for different reasons, depending on their interests, their day-to-day realities, the time of year and a host of other factors. For example an individual might take a summer trip with a primary objective of doing sea kayaking or white water rafting. The same person might take a trip in the winter to ski or to go to museums.

Because travellers often seek a variety of tourism experiences and destinations and because the period covered by the TAMS study is about two years, it is not surprising that the **same** person could be a Sea Kayaker, a River Rafter, an Alpine Skier, a History and Heritage tourist and so on. In other words, the sectors profiled in these materials are not mutually exclusive.

The extent to which membership in the various tourism activity sectors is duplicated is important for understanding how best to package and promote the types of tourism experiences each sector offers potential visitors to British Columbia. As is evident in the following two charts, substantial crossover among the sectors is comparatively rare. In fact, in only two sectors, **Sea Kayaking** and **Back-county lodge guests**, are at least half the members *also* members of another key sector: Hikers and Anglers (respectively) (see Charts A, B).

Chart A: Tourism Activity Sector Cross-Over <i>At least 20% Duplication</i>							
Level of Duplication	HISTORY/HERITAGE	ABORIGINAL ACTIVITY	SELF-GUIDED TOURING	CAMPERS/RVers	ALPINE SKIERS	NORDIC SKIERS	SNOW-MOBILERS
50%+							
49%-45%							
44%-40%		History/Heritage				Hikers	
						Campers/RVers	
39%-35%		Campers/RVers				Self-Guided Touring	Anglers
							Campers/RVers
34%-30%	Self-Guided Touring	Campers/RVers			Campers/RVers	Alpine Skiers	
	Campers/RVers	Self-Guided Touring				Cycling/Mtn Biking	
29%-25%		Hikers			Self-Guided Touring	History/Heritage	
24%-20%		Anglers	History/Heritage	Self-Guided Touring	History/Heritage		Self-Guided Touring
			Campers/RVers	History/Heritage	Hikers		
				Anglers			
				Hikers			
				Alpine Skiers			

Generally, duplication of between one-third to one-half is most common between smaller *niche* outdoor sectors and larger, more broadly defined sectors such as History/Heritage, Camping and Self-Guided Touring. For example, between one-third to almost 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>								
Level of Duplication	RIVER RAFTERS	SEA KAYAKERS	BACK-COUNTRY LODGES	CYCLISTS	HIKERS	DIVERS/ SNORKELERS	GOLFERS	ANGLERS
50%+		Hikers	Anglers					
49%-45%			Campers/ RVers		Campers/ RVers			
44%-40%	Alpine Skiers			Campers/ RVers				
39 %-35%	Campers/ RVers			Hikers		Alpine Skiers		
	Self-Guided Touring							
34%-30%	Hikers	Campers/ RVers		Alpine Skiers	Self-Guided Touring	Self-Guided Touring		Campers/ RVers
		Alpine Skiers		Self-Guided Touring	History/ Heritage	Anglers		
		Self-Guided Touring				Campers/ RVers		
29%-25%		Nordic Skiers	History/ Heritage	History/ Heritage	Alpine Skiers	Hikers		
			Self-Guided Touring	Nordic Skiers				
24%-20%	Anglers	Cycling/ Mtn Biking		Anglers		History/ Heritage	Campers/ RVers	Self-Guided Touring
		History/ Heritage					Anglers	
							Self-Guided Touring	
							Alpine Skiers	

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

IV. Cyclists and Mountain Bikers Market Profile

A. Market Composition

The Cycling and Mountain Biking sectors are composed of pleasure tourists who participated in one or more of three types of summer outdoor land activities as the *main reason* for an overnight trip in the past two years. They represent 1-in-26 of the 20million Canadian overnight pleasure travellers to *any destination* and 1-in-20 of the 6 million Canadians who have come to British Columbia for a vacation in the past two years or so.

Those who participate in *Recreational cycling as a same day excursion* dominate this sector, representing 7-in-10 of all Cyclists/Mountain Bikers (73%) whilst over 2-in-10 participates in *Mountain Biking* (27%) and in *Cycling as an overnight touring trip* (26%).¹⁵

Over two-fifths of Mountain Bikers (41%) also participate in *recreational cycling as a same day excursion* and close to one-fifth of Recreational Cyclists (as a same day excursion or overnight trip) (14%) also go *mountain biking*.

Table C below illustrates the percentage and total number of Canadian Cyclists and Mountain Bikers (on overnight pleasure trips), as well as Canadian Overnight Pleasure Travellers, to any destination and B.C.; 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 (Cycling & Mountain Biking)	Recreational Cycling (Same Day or Overnight)	Mountain Biking	Total Canadian Pleasure Tourists British Columbia	Total Canadian Pleasure Tourists Any Destination
<i>Unweighted Base</i>	(938)	(804)	(241)	(7,788)	(23,156)
<i>Weighted, Projected</i>	761,808	650,914	204,369	6,002,103	19,946,295
Cycling – Recreational cycling, same day excursion	554,986 72.9%	554,986 85.3%	84,003 41.1%	183,262 3.1%	554,986 2.8%
Cycling – Mountain biking	204,369 26.8%	93,475 14.4%	204,369 100%	112,851 1.9%	204,369 1.0%
Cycling – as an overnight touring trip	195,948 25.7%	195,948 30.1%	39,599 19.4%	98,653 1.6%	195,948 1.0%

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

¹⁵ Sum of percentages for various cycling experiences is more than one hundred percent because of multiple responses. A traveller could participate in more than one cycling activity.

B. Regional and Demographic Characteristics

1. Place of Residence

At over 600,000, **Cyclists** – Canadian adults who take vacations *in order to go recreational cycling (day or night)* represent 1-in-30 Canadian overnight pleasure travellers to *any destination* (3.3%) 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 (3.8%).

While they are also an important market sector, **Mountain Bikers** – Canadian adults who take vacations *in order to go mountain biking* – are less prevalent than Recreational Cyclists. At about 200,000, Mountain Bikers represent 1-in-100 of the Canadian overnight pleasure travellers to *any destination* (1%) and 1-in-52 of the six million Canadian who have come to British Columbia for a vacation in the past two years or so (1.9%).

Table 1 provides the place of residence by city, which emerge as noteworthy for Cyclists and Mountain Bikers.

- **Cyclists** and **Mountain Bikers** live in every province.
- **Cycling** seems to be particularly popular among pleasure tourists who reside in the larger cities such as **Montreal** (21.9%), **Toronto** (12.0%) and **Vancouver** (8.8%).
- **Vancouver** is home to about 1-in-12 adult Canadians (7.7%) but significantly more Mountain Bikers (13.1%) live in the city.
- **Mountain Biking**, like Cycling, seems to be particularly popular among pleasure tourists from **Vancouver** (13.1%), **Toronto** (9.2%), **Montreal** (7.0%) and **Calgary** (6.0%).
- In contrast, **Cyclists** and **Mountain Bikers** are less likely to live in the Maritimes and the Prairie Provinces.

Marketing efforts to attract Cyclists and Mountain Bikers may be facilitated by their concentration in the larger cities, which have easier access (flights) to British Columbia.

TABLE 1: PLACE OF RESIDENCE	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
Incidence of Cyclists (Day/Night)	100%	45.7%	3.8%	3.3%
Incidence of Mountain Bikers	14.4%	100%	1.9%	1.0%
Maritimes				
Halifax	0.8%	0.3%	0.6%	1.2%
Quebec				
Quebec City	4.7%	0.9%	0.4%	2.3%
Montreal	21.9%	7.0%	4.1%	11.6%
Ontario				
Ottawa	3.4%	2.0%	2.0%	2.9%
Toronto	12.0%	9.2%	9.1%	16.6%
Hamilton	1.9%	2.4%	1.3%	2.2%
St. Catharines-Niagara	1.5%	3.0%	0.4%	1.1%
Kitchener	0.8%	1.5%	0.7%	1.5%
London	1.1%	1.3%	0.6%	1.5%
Manitoba				
Winnipeg	1.6%	2.3%	2.4%	2.1%
Saskatchewan				
Regina	0.3%	0.9%	0.9%	0.6%
Saskatoon	0.1%	0.3%	1.2%	0.8%
Alberta				
Calgary	1.7%	6.0%	9.0%	3.7%
Edmonton	2.2%	4.1%	7.6%	3.4%
British Columbia				
Vancouver	8.8%	13.1%	20.6%	7.7%
Victoria	1.5%	4.1%	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 Cyclists and Mountain Bikers, there are stark contrasts between them.

- **Mountain Bikers** tend to be concentrated at the younger end of the age spectrum. 1-in-5 of them are young adults (18 to 24 years; 20.8%), and 1-in-4 are between 25 to 34 years of age (25.6%), 35 to 44 years of age (24.7%). Under one-fifth are in their mid-forties to mid-fifties (17.5%) and one-tenth are in their mid-fifties to mid-sixties (9.3%). Only 1-in-52 Mountain Bikers are 65 years of age or older (1.9%) (see Table 2).
- **Cyclists**, in contrast, are more concentrated at the older end of the age spectrum. Over half of these tourists are 45 years or older (51.7%) and over one-quarter are aged 45 to 54 years old (27.9%).
- Men (57.9%) are more likely to be **Cyclists** than are women (42.1%). There is a higher percentage of younger (18-34 years old) male cyclists (31.7%) than female (21.9%) and there are more female cyclists 55 years and older (28.5%) than males (20.4%).
- **Mountain Bikers** are predominately male (75.5%), with women representing only one-quarter of the market (24.5%). Nearly half of male Mountain Bikers are between the ages of 18 and 34 years (48.7%) and over one-third are between 35 to 54 years of age (37.9%). This is opposite for female mountain bikers, where more than half are aged between 35 and 54 years (55.8%) and two-fifths are aged 18-34 years (39.5%). There are fewer female (4.6%) than male (13.4%) Mountain Bikers aged 55 years and older.

TABLE 2: AGE & GENDER	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
Age				
18 – 24 Years	12.2%	20.8%	12.9%	12.7%
25 – 34 Years	15.3%	25.6%	18.4%	18.8%
35 – 44 Years	20.7%	24.7%	18.7%	20.4%
45 – 54 Years	27.9%	17.5%	21.3%	20.2%
55 – 64 Years	18.8%	9.3%	14.9%	14.4%
65+ Years	5.0%	1.9%	13.9%	13.5%
Gender				
Men				
18 – 34 Years	31.7%	48.7%	32.8%	32.2%
35 – 54 Years	47.9%	37.9%	39.5%	41.0%
55+ Years	20.4%	13.4%	27.7%	26.7%
Women				
18 – 34 Years	21.9%	39.5%	29.8%	30.7%
35 – 54 Years	49.6%	55.8%	40.4%	40.3%
55+ Years	28.5%	4.6%	29.8%	29.0%

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

Education, Occupation and Income

The two cycling-oriented segments differ somewhat in terms of education and occupation/work status.

- Specifically, 40.3% of Cyclists have a university degree, whereas 37.6% of Mountain Bikers are university educated.
- Not surprisingly in light of the age differences between the two groups, Cyclists are more likely to be retirees (11.7%) than Mountain Bikers (3.8%) and more Mountain Bikers are going to school (13.7%) than are Cyclists (7.3%).

Despite their differences in age and education, Cyclists and Mountain Bikers are quite similar to one another with respect to household incomes. Both groups represent a broad range of incomes. About 1-in-3 report household incomes under \$60,000 (33.8% Cyclists; 29.7% Mountain Bikers), and in the \$60,000 to under \$100,000 bracket (32.9% Cyclists; 29.1% Mountain Bikers). One-quarter of Cyclists fall within the more affluent \$100,000+ bracket (25.7%) and over one-third of Mountain Bikers (36.9%) fall into the \$100,000+ bracket.

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

TABLE 3: EDUCATION, OCCUPATION, INCOME	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
Education				
High school diploma or less	21.8%	22.9%	32.6%	36.7%
Some post-secondary	12.8%	15.0%	11.9%	10.9%
Post-secondary diploma or certificate	24.7%	24.6%	19.5%	21.6%
University degree+	40.3%	37.6%	35.4%	30.0%
Occupation/Work Status				
Work 30+ hrs/week as paid employee	56.5%	54.6%	58.3%	47.8%
Work as paid employee but part-time (less than 30 hrs/week)	4.9%	4.6%	6.1%	5.4%
Self-employed/Unpaid worker at a family business	9.8%	13.1%	12.8%	9.9%
Going to school	7.3%	13.7%	6.5%	7.2%
Homemaker	3.9%	5.0%	6.1%	5.5%
Retired	11.7%	3.8%	17.8%	17.4%
Household Income				
Under \$40,000	14.7%	21.6%	17.8%	20.6%
\$40,000 - \$59,999	19.1%	8.1%	13.9%	14.6%
\$60,000 - \$99,999	32.9%	29.1%	27.0%	27.1%
\$100,000 +	25.7%	36.9%	29.3%	22.4%

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

3. Household Composition

About two-thirds of **Cyclists** (67.0%) and **Mountain Bikers** (63.0%) live with a spouse or partner (with or without children) and about one-quarter of them have children 17 years or younger (Cyclists 22.0% and Mountain Bikers 26.4%) (see Table 4).

Consistent with their ages, a higher proportion of **Mountain Bikers** live with a spouse/partner and children 17 or under (26.4%) than do Cyclists (22.0%) and a higher percentage of **Cyclists** (40.5%) live with a spouse/partner and no children 17 years or younger than do Mountain Bikers (34.2%).

Cyclist's and **Mountain Bikers** are less likely to live with a spouse /partner and children 18 years and older but none under 17 (Cyclists 4.5% and Mountain Bikers 2.4%) than are *typical* tourists to British Columbia (7.9%) or any destination (7.8%).

Cyclists (8.2%) are more likely than **Mountain Bikers** (7.0%) and *typical* tourists to British Columbia (5.1%) and any destination (6.7%) to live with children and no spouse.

TABLE 4: HOUSEHOLD CHARACTERISTICS	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
"Do you live:"				
Alone	10.6%	11.2%	10.3%	10.7%
With spouse/partner & no children 17 years or younger	40.5%	34.2%	38.6%	38.0%
With spouse/partner & children 17 years or under	22.0%	26.4%	23.5%	22.0%
With spouse/partner & children 18 years & over but none under 17 yrs	4.5%	2.4%	7.9%	7.8%
With children and no spouse	8.2%	7.0%	5.1%	6.7%
Someone other than spouse/child	13.3%	16.3%	13.4%	13.6%

Source: Canadian TAMS Special Tabulations prepared by Tourism British Columbia. "All Canadian Pleasure Tourists" are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. Percentages do not add to 100% because some respondents refrained from answering the question.

V. Competitive Destinations

A. Worldwide Destinations for Overnight Pleasure Trips

When asked to identify the destinations of the overnight pleasure trips they took over a two-year period, virtually all Cyclists and Mountain Bikers indicated that they have taken recent vacations within Canada and 1-in-3 of each group claim to have travelled *only* within Canada (29.8% Cyclists and 31.6% Mountain Bikers) (see Table 5). 3-in-5 of them have been to the United States on a recent overnight pleasure trip (57.6% Cyclists; 61.8% Mountain Bikers), suggesting that the U.S.A. is a particularly attractive destination for these cycling and mountain biking enthusiasts. This is higher than Canadian pleasure tourists as a whole that have been to any destination recently (50.6%).

British Columbia is especially successful in attracting Cyclists (35.2%) and Mountain Bikers (55.2%) vis à vis the general travelling public in Canada (30.1%), however it shares this distinction with Quebec and Ontario.

In fact, **Ontario** is the main provincial competitor for Canadian Mountain Bikers (58.1%) and Quebec is the main provincial competitor for Canadian Cyclists (62.1%). However, for Mountain Bikers, Quebec only attracts 43.5% whilst British Columbia attracts a higher percentage at 55.3%. **British Columbia** is an attractive destination for Mountain Biking enthusiasts.

The United States clearly leads the International market (57.2% Cyclists; 61.8% Mountain Bikers) but other foreign competitive destinations for Cyclists and Mountain Bikers include *Mexico* (12.6% Cyclists; 14% Mountain Bikers), *Europe* (25.4% Cyclists; 25.8% Mountain Bikers), and the *Caribbean* (18.9% Cyclists; 13.1% Mountain Bikers).

Note to Readers

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

In other words, Canadian Cyclists and Mountain Bikers claim to have taken an overnight trip motivated by cycling 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, Cyclists and Mountain Bikers may or may not have participated in cycling activities in a particular country, province or state they have visited recently for an overnight pleasure trip.

TABLE 5: COMPETITIVE DESTINATIONS WORLDWIDE*	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
			To British Columbia	Any Destination
	Total	Total		
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
Canada				
Newfoundland & Labrador	4.7%	2.6%	3.4%	4.3%
Prince Edward Island	9.6%	6.0%	6.3%	7.2%
Nova Scotia	14.7%	9.6%	10.8%	11.7%
New Brunswick	17.2%	11.3%	9.0%	12.6%
Quebec	62.1%	43.5%	23.8%	38.5%
Ontario	58.2%	58.1%	40.2%	52.8%
Manitoba	8.0%	13.5%	16.0%	9.1%
Saskatchewan	15.3%	23.0%	23.2%	11.2%
Alberta	30.2%	49.5%	57.2%	25.4%
British Columbia	35.2%	55.2%	100%	30.1%
Yukon	1.6%	2.4%	3.1%	1.0%
Northwest Territories	0.9%	0.7%	1.8%	0.7%
Nunavut	0.6%	0.8%	0.5%	0.3%
United States	57.6%	61.8%	59.8%	50.6%
Other Countries/Regions				
Mexico	12.6%	14.0%	18.6%	12.0%
South/Central America	6.6%	3.9%	5.6%	4.8%
Caribbean	18.9%	13.1%	14.2%	15.4%
Europe (Incl. the UK and Russia)	24.4%	25.8%	18.7%	15.6%
Asia	5.5%	6.8%	8.7%	5.5%
Australia/New Zealand/ Africa	3.7%	4.9%	4.3%	2.9%
Destination patterns				
Only Canada.	29.8%	31.6%	28.1%	35.6%
Canada & U.S.A. only	56.6%	55.3%	54.5%	61.2%
Canada & Other Countries (Not USA)	42.4%	38.2%	40.2%	49.4%
Canada. & Mexico only	30.5%	33.1%	30.7%	37.3%
U.S.A. only	0.2%	0.8%	0.0%	2.2%

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

B. Destinations: Roles & Ratings

1. Importance of Destination

For most Canadian Cyclists and Mountain Bikers the first consideration in planning their most recent **summer** trip was **destination** (38.5% Cyclists and 40.8% Mountain Bikers) (see Table 8). At the same time, one-fifth begin with the **activities** they wish to participate in (17.1% Cyclists; 21.1% Mountain Bikers) and another one-fifth of these tourists start their trip planning process with a focus on the **type of vacation experience** they wish to have (22.4% Cyclists; 18.9% Mountain Bikers). This level of **activity-driven** planning is higher than is the case among typical Canadian tourists to British Columbia (9.6%) or in the Canadian travel market as a whole (10.6%).

Unlike summer trips, when planning a **winter** trip most Canadian Mountain Bikers first consideration was the **activities** they wish to participate in (30.5%) rather than the destination (28.8%). This level of **activity-driven** planning is substantially higher than is the case among typical Canadian tourists to British Columbia (11.6%) or in the Canadian travel market as a whole (9.1%). A significantly lower proportion of these tourists start their trip planning process with a focus on the **type of vacation experience** they wish to have (13.4% Cyclists; 11.1% Mountain Bikers).

Like Canadians with recent pleasure travel experience in British Columbia (63.0%), Cyclists also put a premium on destination choice *per se*, with nearly 6-in-10 Cyclists (62.8%), claiming that it is *extremely* or *very important* to them, and 57.8% of Mountain Bikers claim that it is *extremely* or *very important* to them. Mountain Bikers tend to be activity driven.

TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total (804)	Total (241)	To British Columbia (7,788)	Any Destination (23,156)
Unweighted base				
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
First Consideration for Most Recent Summer Trip				
Start with destination	38.5%	40.8%	43.2%	37.8%
Start with activities	17.1%	21.1%	9.6%	10.6%
Start with type of vacation experience	22.4%	18.9%	18.4%	18.5%
Look for package deal (with out destination)	0.7%	1.0%	1.1%	1.1%
First Consideration for Most Recent Winter Trip				
Start with destination	25.7%	28.8%	32.5%	28.4%
Start with activities	19.6%	30.5%	11.6%	9.1%
Start with type of vacation experience	13.4%	11.1%	12.8%	11.4%
Look for package deal (with out destination)	1.4%	0.8%	1.4%	1.9%
Importance of Destination				
Extremely/Very Important	62.8%	57.8%	63.0%	62.1%
Extremely important	20.9%	29.3%	23.9%	23.1%
Very important	41.9%	28.5%	39.1%	39.0%
Average*	2.8	2.8	2.8	2.8

Source: Canadian TAMS Special Tabulations prepared by Tourism British Columbia. *Average based on assigned values of 5 for "extremely important" to 1 for "not at all important". Averages are calculated only on those volunteering an opinion. Percentages for "first consideration" do not add to 100% because not all response categories are shown. "All Canadian Pleasure Tourists" are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

2. Importance of Conditions in Destination Choice

Overnight pleasure travellers were asked to rate a variety of “conditions” in terms of their importance in making a destination choice. A three-point semantic scale was used.¹⁶

Cyclists and Mountain Bikers 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, both Cyclists and Mountain Bikers put *feeling safe* at the top of their list (54.9% Cyclists; 41.9% Mountain Bikers) (see Table 9). Over 3-in-10 Mountain Bikers and 4-in-10 Cyclists also place high importance on a destination that poses *no health concerns* (44.0% Cyclists; 30.4% Mountain Bikers), has *convenient access by car* (43.5% Cyclists; 31.1% Mountain Bikers) and has *many things for adults to see and do* (40.6% Cyclists; 34.2% Mountain Bikers).

While the conditions they impose on destination choices are very similar, there are some noteworthy differences between Cyclists and Mountain Bikers:

- **Mountain Bikers** are more apt to take into account the availability of *camping facilities* (29.3% Mountain Bikers; 26.6% Cyclists) as well as the availability *budget lodging* (25.4% Mountain Bikers; 24.6% Cyclists), than are Cyclists.
- **Mountain Bikers** lodging preferences may be a function of their age and life stage. As younger tourists with children, Mountain Bikers can be expected to be more budget conscious and interested in camping as an activity and experience for their children.
- **Cyclists** are more interested in destinations that offer *mid-range accommodation* (29.3% Cyclists, 20.2% Mountain Bikers) and compared with Mountain Bikers they are influenced by *direct access by air* (23.1% Cyclists, 15.1% Mountain Bikers) and *convenient access by train/bus* (12.5% Cyclists, 7.8% Mountain Bikers).

¹⁶ “Highly important”, “Somewhat important”, and “Of no importance”.

**Summary: Considerations Deemed *Highly Important* By At Least 1-in-4 Cyclists/
Mountain Bikers¹⁷**

	Cyclists	Mountain Bikers	Canadian Pleasure Tourists	
			To British Columbia	Any Destination
Feeling safe	54.9%	41.9%	65.1%	65.9%
No health concerns	44.0%	30.4%	46.8%	49.9%
Convenient access by car	43.5%	31.3%	36.2%	43.3%
Lots for adults to see/do	40.6%	34.2%	39.2%	38.0%
Mid Range accommodation	29.3%	20.2%	29.6%	29.6%
Camping	24.6%	29.3%	13.9%	12.8%
Information available on internet	22.9%	24.8%	25.7%	24.6%
Budget accommodation	22.0%	25.4%	21.5%	21.7%

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

TABLE 9: CONDITIONS FOR SELECTING A DESTINATION	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination*
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
<i>Bold rows are proportion stating "Highly Important" in rank order by Cyclists</i>				
Feeling safe	54.9%	41.9%	65.1%	65.9%
Of no importance	5.2%	10.5%	3.1%	3.5%
No health concerns	44.0%	30.4%	46.8%	49.9%
Of no importance	10.1%	16.8%	8.8%	8.2%
Convenient access by car	43.5%	31.3%	36.2%	43.3%
Of no importance	12.0%	16.4%	13.6%	11.5%
Lots for adults to see/do	40.6%	34.2%	39.2%	38.0%
Of no importance	6.7%	4.9%	7.2%	7.3%
Mid-range accommodation	29.3%	20.2%	29.6%	29.6%
Of no importance	16.5%	15.5%	12.6%	12.8%
Camping	24.6%	29.3%	13.9%	12.8%
Of no importance	37.8%	28.7%	48.7%	50.6%
Direct access by air	23.1%	15.1%	31.6%	28.9%
Of no importance	27.6%	36.0%	17.0%	21.7%
Information available on internet	22.9%	24.8%	25.7%	24.6%
Of no importance	26.6%	22.2%	24.7%	27.1%
Budget accommodation	22.0%	25.4%	21.5%	21.7%
Of no importance	24.5%	19.1%	23.4%	23.8%
Low cost packages available	17.0%	16.3%	20.9%	22.8%
Of no importance	28.7%	27.2%	27.3%	23.1%
Lots for children to see/do	16.0%	10.1%	13.7%	16.4%
Of no importance	59.5%	57.0%	62.0%	56.5%
Familiar with culture & language	13.2%	9.3%	10.8%	13.6%
Of no importance	37.0%	39.9%	28.6%	26.9%
Convenient access by train/bus	12.5%	7.8%	11.4%	13.1%
Of no importance	43.3%	49.3%	40.3%	39.3%
Very different culture than own	11.0%	9.8%	9.1%	8.9%
Of no importance	32.8%	34.3%	39.6%	39.7%
Have friends or relatives there	4.8%	7.3%	10.2%	11.1%
Of no importance	69.5%	61.1%	59.6%	59.0%
Luxury accommodation	4.8%	2.2%	5.7%	6.8%
Of no importance	66.1%	71.8%	57.5%	54.5%
Great shopping	4.8%	4.3%	11.1%	12.3%
Of no importance	63.7%	58.8%	45.0%	43.2%
Disabled-person-friendly	4.3%	4.1%	3.6%	5.6%
Of no importance	79.5%	79.2%	79.6%	73.8%

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

3. Appeal of Various Destinations

Canadian Cyclists and Mountain Bikers are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel. Cyclists accord B.C. a rating of 8.7 and Mountain Bikers an even higher rating of 9.2 on a ten-point scale (see Table 10).¹⁸ Though significantly lower than B.C.'s, moderately favourable ratings are accorded a host of destinations, including **Hawaii** (7.8 Cyclists; 7.7 Mountain Bikers), **Quebec** (7.8 Cyclists; 7.2 Mountain Bikers), **California** (7.5 Cyclists; 7.1 Mountain Bikers), **Alberta** (7.2 Cyclists; 7.4 Mountain Bikers), **Nova Scotia** (7.1 Cyclists; 7.0 Mountain Bikers) and **Prince Edward Island** (7.1 Cyclists; 6.8 Mountain Bikers).

British Columbia is given the highest rating as an appealing destination for pleasure travel, and less than one-tenth of Canadian Cyclists and Mountain Bikers refrained from rating the province, thus indicating that Canadian travellers are knowledgeable about the destination and its touristic appeal.

Summary: Highest Appeal Destinations among Cyclists and/or Mountain Bikers¹⁹

	Cyclists	Mountain Bikers	Canadian Pleasure Tourists	
			To British Columbia	Total
British Columbia	8.7	9.2	9.0	8.8
Hawaii	7.8	7.7	8.1	8.3
Quebec	7.8	7.2	6.7	9.0
California	7.5	7.1	7.4	8.4
Alberta	7.2	7.4	7.3	8.5
Nova Scotia	7.1	7.0	7.2	8.4
Prince Edward Island	7.1	6.8	7.2	8.3
Colorado	6.7	6.9	6.1	7.6

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).

¹⁸ 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.

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

Among *all Cyclists and Mountain Bikers who have been to British Columbia in the past two years or so*, the province achieves a rating of 8.8, surpassing Hawaii (7.8).²⁰ The challenge, of course, is getting these cycling enthusiasts back to the province!

²⁰ Includes Cyclists and Mountain Bikers (NET).

TABLE 10: APPEAL OF VARIOUS DESTINATIONS	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
<i>Bold rows are average ratings*</i>				
British Columbia	8.7	9.2	9.0	8.8
No rating provided	10.0%	8.3%	2.1%	12.4%
Newfoundland & Labrador	6.2	6.8	6.8	7.9
No rating provided	16.0%	16.7%	19.5%	21.5%
Nova Scotia	7.1	7.0	7.2	8.4
No rating provided	10.7%	8.9%	14.5%	16.3%
New Brunswick	6.7	6.5	6.5	8.3
No rating provided	11.2%	11.1%	16.8%	16.9%
Prince Edward Island	7.1	6.8	7.2	8.3
No rating provided	9.9%	14.7%	15.5%	16.6%
Quebec	7.8	7.2	6.7	9.0
No rating provided	5.0%	8.0%	11.1%	10.2%
Ontario	6.8	7.0	6.6	9.2
No rating provided	4.5%	6.0%	8.0%	8.0%
Manitoba	4.7	5.0	4.8	7.9
No rating provided	15.3%	11.7%	14.6%	21.1%
Saskatchewan	4.5	4.9	4.8	7.9
No rating provided	15.1%	10.7%	13.4%	20.7%
Alberta	7.2	7.4	7.3	8.5
No rating provided	12.3%	5.6%	6.8%	15.3%
Yukon	6.2	6.9	6.4	7.5
No rating provided	17.7%	17.3%	19.5%	24.9%
Northwest Territories	5.5	6.4	5.8	7.4
No rating provided	18.2%	19.1%	21.1%	25.7%
Nunavut	5.0	5.8	5.0	7.2
No rating provided	19.8%	19.2%	24.3%	28.1%
New York State	6.4	6.0	6.2	8.4
No rating provided	10.5%	8.3%	14.1%	16.0%
Colorado	6.7	6.9	6.1	7.6
No rating provided	18.6%	14.0%	19.9%	24.5%
Florida	6.4	6.2	6.5	8.7
No rating provided	10.6%	7.9%	12.2%	13.5%
California	7.5	7.1	7.4	8.4
No rating provided	13.1%	10.4%	10.5%	16.0%
Hawaii	7.8	7.7	8.1	8.3
No rating provided	13.6%	11.8%	12.5%	17.1
Arizona	6.7	6.2	6.5	7.8
No rating provided	17.1%	11.8%	15.9%	21.1%

Source: Canadian TAMS Special Tabulations prepared by Tourism British Columbia. *Bold rows* are average ratings calculated using a ten-point bi-polar rating scale ranging from very appealing (10) to very unappealing (1). Averages are calculated on those volunteering a rating only. *Any Destination - All Canadian Tourists - are Canadians 18 years of age or over who claim to have taken at least one overnight pleasure/non pleasure trip in the past two years or so. "To British Columbia" is the subset of "All Canadian Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so

4. Number of Good Reasons to Visit Various Destinations

Not too surprisingly, the *same* destinations accorded high *appeal* ratings are also the ones that emerge at the top of Cyclists' and Mountain Bikers' lists for having *many good reasons* to visit on a pleasure trip (see Table 11).²¹ Specifically, **British Columbia** tops the list with 7-in-10 Cyclists and nearly 9-in-10 Mountain Bikers stating that there are *many good reasons* to go to this destination.

British Columbia significantly surpasses all other Canadian and U.S. destinations, as a destination that offers Cyclists (70.6%) and Mountain Bikers (87.5%) *many good reasons* to visit. Other destinations with many reasons to visit, according to Cyclists and Mountain Bikers, are Quebec, Hawaii, California and Alberta.

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

		<u>Canadian Pleasure Tourists</u>					
		<u>Mountain Bikers</u>		<u>To British Columbia</u>		<u>Total</u>	
<u>Cyclists</u>							
B.C.	71%	B.C.	88%	B.C.	83%	B.C.	65%
Quebec	56%	Alberta	51%	Hawaii	56%	Hawaii	55%
Hawaii	54%	Hawaii	51%	California	50%		
California	50%	Quebec	51%				

Among Cyclists and Mountain Bikers who have recently travelled to British Columbia, over 7-in-10 say that there are many good reasons to go (72.9%).²² 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.

²¹ 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*.

²² Includes Cyclists and Mountain Bikers (NET).

TABLE 11: NUMBER OF REASONS TO VISIT VARIOUS DESTINATIONS	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
<i>% stating "MANY" good reasons to visit</i>				
British Columbia	70.6%	87.5%	83.4%	64.6%
<i>Rank order among Cyclists</i>				
Quebec	56.1%	50.5%	35.3%	41.6%
Hawaii	53.7%	51.0%	55.5%	54.6%
California	49.9%	47.1%	49.8%	47.1%
Ontario	41.0%	42.7%	35.4%	43.3%
Alberta	40.6%	51.1%	45.3%	34.9%
Nova Scotia	39.8%	34.9%	33.5%	32.4%
Florida	37.4%	25.9%	35.0%	40.4%
Prince Edward Island	35.9%	29.8%	33.8%	32.0%
New York State	30.0%	28.4%	30.8%	30.4%
Newfoundland & Labrador	29.6%	34.1%	30.3%	27.4%
Arizona	28.0%	26.4%	22.1%	22.9%
New Brunswick	26.8%	26.4%	21.3%	22.9%
Colorado	24.2%	28.8%	17.8%	18.7%
Yukon	22.0%	27.4%	22.1%	16.9%
Northwest Territories	15.5%	20.3%	15.5%	12.3%
Nunavut	10.9%	15.2%	11.0%	9.1%
Saskatchewan	6.4%	12.2%	10.1%	7.7%
Manitoba	6.8%	12.0%	8.6%	7.5%

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

VI. Activities on Overnight Trips

A. Introduction

The 2006 TAMS questionnaire included approximately 190 activities a person may have engaged in while on a trip. In addition to capturing *incidence* of participation in this array of activities, the study asks consumers to indicate whether an activity they engaged in on *any* overnight trip in the past two years was a *main reason for taking any of these trips*.²³

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 **going cycling and or mountain biking** 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 cycling and or mountain biking 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* Cyclists and Mountain Bikers 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 Cyclists and Mountain Bikers provided in this chapter are appended.

²³ Presumably, “these trips” are those on which the specific activity took place.

B. Trip Activities & Drivers

1. Cyclists' and Mountain Bikers' Cross-Over with Other Trip Activity Sectors

As demonstrated by their representation in other activity-based tourism sectors, Cyclists and Mountain Bikers are multi-dimensional travellers.²⁴

Cyclists

2-in-5 Cyclists are also **Hikers** and/or **Campers/RVers**, around 3-in-10 are **Travellers on Self-Guided Overnight Tours**, **Alpine Skiers** and/or **History/Heritage Tourists**, and around 1-in-4 are **Nordic Skiers** and/or **Anglers** (see Table 12).

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

- Compared to the Canadian travelling public as a whole, Cyclists are seven times as likely to be Nordic Skiers.
- They are six times as likely to be Sea Kayakers.
- They are than five times as likely to be Hikers, than the Canadian travelling public as a whole.
- Cyclists are more than twice times as likely as the Canadian travelling public as a whole, to take trips in order to go Alpine Skiing, to be Backcountry Lodge Guests, go river rafting, or to obtain Aboriginal cultural experiences, as well as go diving/snorkelling, go camping/RVing, or obtain history and heritage experience, go golfing and/or fishing.

²⁴ 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 Cyclists and Mountain Bikers provided in this chapter are appended.

Mountain Bikers

Nearly one-half of Mountain Bikers are also **Campers and RVers**, about 2-in-5 are **Alpine Skiers** and/or **Hikers**, 3-in-10 are **Nordic Skiers** and/or are **Travellers on Self-Guided Overnight Tours History/Heritage Tourists**, and 1-in-4 are **Anglers** (see Table 12).

Like Cyclists, Mountain Bikers are however, more apt than the Canadian travelling public as a whole to be members of *other* activity-based segments:

- Mountain Bikers are nine times as likely to be Nordic Skiers.
- They are than six times as likely to be River Rafters.
- They are five times as likely to be Hikers.
- Mountain Bikers are four times as likely to be Divers/Snorkellers, Alpine Skiers and/or Sea Kayakers.
- They are three times as likely to be Snowmobilers.
- They are also more than twice as likely as the Canadian travelling public as a whole, to take trips in order to go camping/RVing, obtain Aboriginal cultural experiences, and/or to go fishing.

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

	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists			
			To British Columbia	Any Destination	Index to All Canadian Tourists**	
	Total	Total			Cyclists	Mountain Bikers
Unweighted base	(804)	(241)	(7,788)	(23,156)		
Weighted, Projected	650,914	204,369	6,002,103	19,946,295		
<i>Rank order among Cyclists</i>						
Cycling/Mountain Biking	100%	100%	4.8%	3.8%	2,632	2,632
Hikers	41.2%	38.4%	9.4%	7.6%	542	505
Campers/RVers	40.2%	46.5%	17.7%	16.1%	250	289
Self-Guided Overnight Touring Travellers	31.5%	28.1%	22.4%	17.7%	178	159
Alpine Skiers	28.1%	41.3%	14.9%	9.7%	290	426
History and Heritage Tourists	27.5%	23.5%	12.2%	12.1%	227	194
Nordic Skiers	24.7%	29.7%	3.8%	3.2%	772	928
Anglers	23.4%	25.8%	10.9%	11.4%	205	226
Golfers	11.5%	9.5%	7.2%	5.6%	205	170
Backcountry Guests	8.3%	5.2%	2.6%	2.9%	286	179
Aboriginal Activity Tourists	7.2%	7.1%	3.7%	2.8%	257	254
Divers & Snorkellers	5.8%	10.2%	3.4%	2.3%	252	443
Sea Kayakers	5.4%	3.4%	1.4%	0.8%	675	425
Snowmobilers	3.8%	9.0%	1.9%	2.5%	152	360
River Rafters	2.9%	7.1%	1.6%	1.1%	264	645

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

2. Major Trip Activity Groups

Like most tourists, Cyclists and Mountain Bikers take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.²⁵

- In addition to taking trips in order to go cycling or mountain biking over two-thirds of Cyclists (70.3%) and Mountain Bikers (68.9%)²⁶ take trips motivated by engaging in at least one **water-based outdoor activity**.
- **Outdoor winter activities** are more apt to be trip motivators for Mountain Bikers (62.9%) than they are for Cyclists (52.6%). The *younger* Mountain Bikers are more likely to take trips in order to engage in an **outdoor winter activity** (73.1%) than are older Cyclists (62.9%).
- About 4-in-10 Cyclists and Mountain Bikers are motivated by the **Performing Arts**, as well as **Festivals and Events**.
- Close to one-third of Cyclists and Mountain Bikers have taken recent overnight pleasure trips in order to engage in **entertainment** activities such as theme parks, casinos and movies. 3-in-10 Cyclists and Mountain Bikers have been motivated by **shopping** and **dining-related** experiences as well as **cultural** interests such as going to well-known historic sites, museums, or cultural performances.
- Going to **spectator sporting events** such as professional baseball or football games, as a reason for taking a trip, is characteristic of 1-in-4 Cyclists and 1-in-3 Mountain Bikers.

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, more Cyclists and Mountain Bikers *participated* in at least one performing arts experience while on a recent overnight pleasure trip (66.3% Cyclists; 63.6% Mountain Bikers) than claim to have taken a trip motivated by one of these activities (44.2% Cyclists; 35.3% Mountain Bikers). However, when it comes to water based activities the difference between *participation* rates (nearly 9-in-10) and *motivation* rates (nearly 7-in-10) is not as great as compared to the other categories.

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

²⁶ All Cyclists and Mountain Bikers are included in the *land-based outdoor activity segment* because "cycling" is one of the activities used to define members of this group. Other key activities included in the *land-based* segment include hiking, bird watching and viewing land-based animals.

Shopping and dining experiences are especially likely to be “one-of-many” trip activities (90.0% Cyclists; 86.1% Mountain Bikers) but the driving force behind a trip for relatively few segment members (34.9% Cyclists; 30.6% Mountain Bikers). Similarly, about three-fifths of Cyclists and Mountain Bikers went to a festival or event on a recent trip but only one-third of them took the trip in order to do so.

Compared to *all* Canadian overnight pleasure travellers, Cyclists and Mountain Bikers are three times as likely to identify outdoor winter activities and outdoor land-based activities and about twice as likely to identify the water-based activities, as ones that *motivated* recent trips (main reason).

Summary: Activities named by at least about 1-in-3 Cyclists or Mountain Bikers as ones that *motivated* (main reason) a recent overnight trip.

<u>Major Activity Group</u>	<u>Main Reason</u>			<u>Any Participation</u>		
	Cyclists	Bikers	All Canadian	Cyclists	Bikers	All Canadian
			Mountain Pleasure			Mountain Pleasure
Outdoor Land Based	100%	100%	29%	100%	100%	67%
Outdoor Water-Based	70%	69%	33%	89%	87%	65%
Outdoor Winter Activities	53%	63%	17%	64%	73%	30%
Performing Arts	44%	36%	18%	66%	64%	44%
Festivals & Events	39%	40%	16%	62%	65%	44%
Exhibits/Historic Sites/Museums	38%	30%	17%	74%	69%	59%

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	Cyclists (Day/Night)		Mountain Bikers	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(804)	(804)	(241)	(241)
Weighted, Projected	650,914	650,914	204,369	204,369
<i>Rank order among Cyclists - Main Reason</i>				
Outdoor Land Based Activities	100%	100%	100%	100%
Outdoor Water Based Activities	70.3%	88.9%	68.9%	87.4%
Accommodation Stayed at	59.6%	85.5%	59.8%	89.5%
Outdoor Winter Activities	52.6%	63.9%	62.9%	73.1%
Performing Arts	44.2%	66.3%	35.3%	63.6%
Festivals & Events	39.0%	62.2%	40.0%	64.8%
Exhibits/Historic Sites/Museums	38.2%	74.0%	29.5%	69.2%
Theme/Amusement Parks/Movies	37.2%	64.0%	33.9%	63.9%
Shopping/Dining/Food Related	34.9%	90.0%	30.6%	86.1%
Spectator Sports	24.3%	36.6%	33.4%	52.4%
Team Sports/Tournaments/Games	17.2%	29.9%	23.4%	42.9%
Hands-on Learning Activities	12.3%	26.2%	12.3%	27.8%
Aboriginal Experiences	7.2%	18.9%	7.1%	18.1%
Air Based Activities	0.9%	3.5%	1.4%	2.9%

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

3. Individual Trip Activities: The Outdoors

Many outdoor experiences are popular among Cyclists and Mountain Bikers (see Table 14).²⁷ Although they particularly enjoy land-based activities they are also partial to water-based activities. Cyclists and Mountain Bikers like to be active while on vacation but they also enjoy taking time to enjoy themselves and relax in nature. Mountain Bikers are more apt to be motivated by and participate in more rigorous outdoor activities, than are Cyclists.

Land Based Activities:

- **Mountain Bikers** are especially interested in land-based travel experiences as motivations for recent overnight pleasure trips, about 3-in-10 take trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them, go alpine skiing and/or go hiking. A higher percentage of Mountain Bikers take trips to go jogging or exercise outdoors compared to Cyclists.
- **Cyclists** are similar to Mountain Bikers in that approximately 3-in-10 take trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them. Over 1-in-4 are motivated by hiking and/or to go alpine skiing. However, a higher percentage of Cyclists take trips to visit well-known natural wonders compared to Mountain Bikers.
- A higher percentage of **Mountain Bikers** are motivated by cross-country skiing and ice-skating than are Cyclists.

Water based Activities:

- Water based activities are also popular motivations for recent overnight pleasure trips for **Mountain Bikers**, 1-in-3 enjoying swimming in lakes, whilst 1-in-4 enjoy sunbathing or sitting on a beach and/or fishing, especially in fresh water.
- **Cyclists** are similar to Mountain Bikers in that 1-in-3 enjoying sunbathing or sitting on a beach whilst 1-in-4 enjoy swimming in lakes and oceans and/or fishing, especially in fresh water.

²⁷ 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 Cyclists and Mountain Bikers provided in this chapter are appended.

- **Mountain bikers** prefer to swim in lakes and **Cyclists** prefer to swim in oceans.
- A higher percentage of Mountain Bikers are motivated by motor boating than are Cyclists and a higher percentage of cyclists are motivated by kayaking/canoeing (freshwater) than are Mountain Bikers.

Compared to the typical Canadian overnight pleasure traveller, Cyclists and Mountain Bikers are more likely to identify *active* outdoor activities such as cycling, hiking, alpine skiing, fishing, or swimming and *passive* ones such as sunbathing on a beach as ones that *motivated* recent trips (main reason) and as activities that were engaged in on these trips (any participation). Their higher level of engagement with the outdoors on trips vis à vis the typical Canadian tourist suggests that these cycling enthusiasts represent distinctive markets.

Summary: Activities named by at least about 1-in-3 Cyclists or Mountain Bikers as ones that *motivated* (main reason) a recent overnight trip.

<u>Outdoor Activities</u>	<u>Main Reason</u>			<u>Any Participation</u>		
	Cyclists	Mountain Bikers	All Canadian Pleasure Tourists	Cyclists	Mountain Bikers	All Canadian Pleasure Tourists
Recreational Cycling, same day excursions	85%	41%	3%	89%	58%	11%
Nature Park	36%	33%	12%	50%	48%	30%
Camping – Public campground	35%	39%	12%	50%	61%	26%
Sunbathing or sitting on a beach	34%	26%	18%	59%	52%	40%
Hiking - Same day excursion	31%	28%	5%	50%	50%	24%
Cycling – overnight Touring trip	30%	19%	1%	31%	21%	1%
Swimming in Lakes	26%	32%	9%	57%	70%	35%
Alpine Skiing	25%	32%	8%	31%	42%	12%
Mountain Biking	14%	100%	1%	31%	100%	4%

These high levels of differentiation from typical Canadian travellers are further evidence of Cyclists and Mountain Bikers distinctive outdoor tourism interests.

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

TABLE 14: INDIVIDUAL OUTDOOR ACTIVITIES
– MAIN & ANY*

	Cyclists (Day/Night)		Mountain Bikers	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(804)	(804)	(241)	(241)
Weighted, Projected	650,914	650,914	204,369	204,369
<i>Rank order among Cyclists - Main Reason</i>				
Cycling	100%	100%	100%	100%
Cycling – Recreational cycling, same day excursion	85.3%	89.4%	41.1%	57.8%
Cycling - as an overnight touring trip	30.1%	31.0%	19.4%	20.8%
Cycling - Mountain biking	14.4%	19.5%	100%	100%
Nature park	35.6%	50.2%	33.0%	48.2%
Camping				
Public campground	34.5%	49.6%	38.8%	60.6%
Private campground	18.3%	31.2%	19.7%	38.1%
Camp site in wilderness setting	9.3%	17.1%	16.4%	35.0%
Sunbathing or sitting on a beach	33.8%	58.6%	26.0%	51.8%
Hiking				
Same day excursion	31.0%	49.7%	27.7%	49.9%
Backpacking with overnight camping	24.3%	27.9%	26.2%	33.9%
Swimming in lakes	26.1%	56.8%	31.6%	69.8%
Alpine Skiing	25.2%	30.9%	32.1%	41.7%
Swimming in oceans	23.0%	44.2%	15.8%	38.5%
Fishing – Fresh water	21.4%	29.4%	24.0%	37.3%
Kayaking/canoeing – Fresh water	18.5%	28.8%	19.0%	37.6%
Well known natural wonders	18.2%	37.9%	10.6%	33.4%
Cross Country Skiing	17.9%	27.5%	21.3%	30.7%
Ice Skating	13.3%	26.1%	17.3%	35.3%
Motor Boating	11.3%	27.0%	15.3%	40.2%
Fitness – Jogging/Exercise Outdoors	9.4%	24.4%	10.2%	33.0%

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

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

By and large, Cyclists and Mountain Bikers 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.²⁸ Entertainment-oriented activities in general, and particularly performing arts, festivals and events and spectator sporting events are, however, trip motivators for Cyclists and Mountain Bikers (see Table 15), attracting about 1-in-3 of these tourists.

Culture

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

Entertainment

Perhaps because they tend to live in families with children, Mountain Bikers are particularly apt to take a trip to go to an **amusement park** (Main, 19%; Any, 33%). However, Cyclists are also drawn to amusement parks (Main, 18%; Any, 32%).

Going to **movies** is a popular trip activity (*any*) among about two-fifths of Cyclists, and over one-half of Mountain Bikers. **Free outdoor performances** attract one-third of Cyclists and Mountain Bikers and **Firework displays** attract just under one-third of Cyclists and Mountain Bikers. All of these entertainment-oriented experiences are much more commonly identified as *one among many* trip activities than as a main reason for taking a trip among both Cyclists and Mountain Bikers.

Dining

Similar to many entertainment-oriented activities, dining out at **restaurants offering local ingredients and cuisine** (Cyclists: Main, 15%; Any, 66%; Mountain Bikers: Main, 10%; Any, 69%), dining in **high-end restaurants (not with an international reputation)** (Cyclists: Main, 8%; Any, 34%; Mountain Bikers: Main, 5%; Any, 36%)

²⁸ Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Cyclists and Mountain Bikers provided in this chapter are appended.

and visiting **local outdoor cafes** (Cyclists: Main, 8%; Any, 60%; Mountain Bikers: Main, 7%; Any, 60%) are much more common trip experiences (any) than trip drivers for Cyclists and Mountain Bikers.

Shopping

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

Comparison to Canadian Pleasure Travellers

As noted in the previous section, compared to *all* Canadian overnight pleasure travellers, Cyclists and Mountain Bikers are more likely to engage in outdoor activities or take trips for these activities. These cycling 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). Cyclists and Mountain Bikers are about twice as likely to be motivated to participate in team sports, tournaments and games, spectator sports, to attend arts performances, to go to amusement parks, festivals & events, go to well know historic sites, and to go shopping for clothing, shoes, jewellery than are *typical* Canadian pleasure travellers. They are three times more likely to participate in hands on learning activities and to stroll around a city to see architecture (as a main trip motivator) and they are five times more likely to attend free outdoor performances and firework displays than are *typical* Canadian pleasure travellers.

Summary: Activities named by at least about 1-in-3 Cyclists or Mountain Bikers as ones that *they participated in* on a recent overnight trip.

<u>Other Activities</u>	<u>Main Reason</u>			<u>Any Participation</u>		
	Cyclists	Bikers	Tourists	Cyclists	Bikers	Tourists
Performing Arts (any)	44%	35%	18%	66%	64%	44%
Festivals& Events	39%	40%	16%	62%	65%	44%
Spectator Sports (any)	24%	33%	13%	37%	52%	28%
Strolling in a city to see architecture	22%	16%	8%	56%	54%	41%
Amusement parks	18%	19%	9%	32%	33%	21%
Team Sports, Games Tournaments (any)	17%	23%	9%	30%	43%	22%
Free outdoor performances	15%	10%	3%	36%	33%	17%
Historic Sites – Well	15%	11%	6%	42%	43%	30%

<u>Other Activities</u>	<u>Main Reason</u>			<u>Any Participation</u>		
		Mountain Bikers	All Canadian Pleasure Tourists	Cyclists	Mountain Bikers	All Canadian Pleasure Tourists
Known						
Dining - restaurants offering local ingredients & recipes	15%	10%	6%	66%	69%	57%
Shopping – Clothing, shoes, jewellery	14%	14%	7%	55%	63%	57%
Firework Displays	14%	12%	3%	30%	30%	16%

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*

	Cyclists (Day/Night)		Mountain Bikers	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(804)	(804)	(241)	(241)
Weighted, Projected	650,914	650,914	204,369	204,369
<i>In rank order by main reason within each subgroup (Cyclists)</i>				
Cultural & Heritage				
Any Performing Arts	44.2%	66.3%	35.3%	63.6%
Festival & Events	39.0%	62.2%	40.0%	64.8%
Strolling around a city to see architecture	21.8%	55.5%	15.5%	53.6%
Historic sites - well known	14.5%	42.1%	11.3%	43.4%
Hands on Learning Activities	12.3%	26.2%	12.3%	27.8%
Historic sites - other	11.4%	32.2%	9.7%	38.4%
General History/Heritage Museum	11.2%	35.2%	12.2%	30.4%
Art Galleries	11.1%	31.7%	9.8%	34.5%
Entertainment				
Amusement park	18.4%	31.6%	19.0%	32.8%
Free outdoor performances	14.8%	35.6%	9.9%	33.2%
Firework displays	13.7%	30.3%	12.3%	30.4%
Movies/cinema	12.9%	40.5%	10.7%	53.5%
Food & Dining				
Dining – restaurants offering local ingredients and recipes	14.7%	65.7%	10.2%	68.5%
Dining - other high-end (not with international reputation)	8.4%	34.4%	4.7%	36.1%
Local outdoor cafes	8.3%	60.0%	7.4%	60.4%
Shopping				
Clothing, shoes, jewellery	13.7%	54.9%	14.0%	63.3%
Local arts & crafts studios	8.4%	49.2%	5.6%	46.4%
Bookstores or music stores	7.7%	49.8%	5.6%	56.3%
Sports				
Spectator Sports (Any)	24.3%	36.6%	33.4%	52.4%
Team Sports, Tournaments, Games (Any)	17.2%	29.9%	23.4%	42.9%

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

5. Overnight Cruises & Organized Group Tours

Most Cyclists and Mountain Bikers are not recent overnight cruise passengers (see Table 16). Of the 1-in-10 Cyclists and about 1-in-17 Mountain Bikers who have taken an overnight ocean cruise in the past two years or so, destinations in the Caribbean and other locations are more popular than Alaska.

Of those who participate in overnight group tours, more Cyclists claim to have taken an **organized** overnight group tour to multiple locations (17.8%) than have Mountain Bikers (15.8%) or recent Canadian travellers to B.C. (12.2%) or any other destination (10.2%). Mountain Bikers who have gone on an overnight-organized tour (17.6%) display more preference for tours to *single* versus *multiple* destinations than Cyclists (10.3%) or recent Canadian travellers to B.C. (8.2%) or any other destination (7.9%).

More Mountain Bikers claim to have taken **self-directed** same day touring trips over a two-year period (41.3% Cyclists; 49.4% Mountain Bikers). Cyclists are more inclined to take self-directed day tours that are not organized (31.5%) than are Mountain Bikers (28.1%).

Favoured themes for organized day excursions include tours around the countryside and/or a city, wilderness or outdoor tours and sightseeing cruises. Both Mountain Bikers and Cyclists have the same order of ranking tours but a higher percentage of Mountain Bikers compared to Cyclists enjoy taking city tours, wilderness or outdoor tours and sightseeing cruises.

TABLE 16: CRUISES/GROUP TOURS	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
Took any overnight cruise in past 2 years				
Type of Cruise/Destination				
Ocean (Net)	9.7%	5.9%	12.6%	8.8%
Ocean – Caribbean	5.7%	2.1%	5.9%	5.3%
Ocean – Other	3.5%	3.2%	5.1%	3.2%
Ocean – Alaska	0.8%	0.8%	4.0%	1.7%
Lake or River cruise (Net)	7.1%	5.0%	3.0%	4.4%
Great Lakes	0.7%	0.5%	0.4%	0.8%
St. Lawrence River	3.8%	1.9%	0.7%	1.9%
Other lake/River	3.7%	3.3%	2.2%	2.3%
Touring				
Overnight group tour – multiple locations	17.8%	15.8%	12.2%	10.2%
Overnight group tour –Single Location	10.3%	17.6%	8.2%	7.9%
Organized group tour – same day	24.9%	26.0%	28.3%	21.9%
Self-Directed tour – same day	41.3%	49.4%	34.8%	28.6%
Self-Directed tour – not organized	31.5%	28.1%	22.4%	17.7%
Unspecified same day tours	1.8%	0.3%	1.9%	2.9%
Type of Organized Day Tour <i>(In rank order by Cyclists)</i>				
Countryside	33.1%	32.3%	26.4%	22.0%
City	28.0%	29.8%	28.4%	22.9%
Wilderness/outdoor	21.6%	25.7%	15.6%	12.7%
Sightseeing cruise (day excursion)	20.0%	21.5%	15.9%	12.8%
Wineries	9.6%	10.9%	8.7%	5.6%
Casino	8.6%	4.0%	6.6%	6.5%
Factory	4.5%	4.9%	4.2%	2.6%
Airplane/helicopter (pilot or passenger)	3.7%	2.9%	3.0%	1.9%

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

VII. Trip Planning

A. Who Does the Planning?

The majority of Cyclists and Mountain Bikers claim to have *personal involvement* in trip planning for **all** or **most** trips planned over the past two years.

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

TABLE 17: TRAVEL PLANNING	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
Frequency of personal involvement in trip planning, past 2 years				
All	62.8%	61.8%	65.9%	61.8%
Most	18.0%	20.0%	16.7%	15.1%
Some	10.7%	12.7%	9.6%	10.3%
None/not stated	8.5%	5.5%	7.8%	12.8%
Main responsibility for trip planning				
Respondent	41.0%	44.4%	37.8%	34.9%
Shared with other household member	29.2%	28.0%	28.7%	27.6%
Spouse/partner	10.4%	8.7%	15.0%	13.5%
Other/not stated/not involved in travel planning	13.6%	14.1%	13.0%	14.8%

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

B. Travel Information Sources & Travel Media

Of the many sources of travel information available to Cyclists and Mountain Bikers, the internet tops the chart (see Table 18). Over 7-in-10 of these tourists rely on the **internet** for travel information, 6-in-10 rely on anecdotal information provided by **friends and relatives**, over 5-in-10 rely on their own **past experience** and over 4-in-10 rely on **maps** and **Visitor Information Centres**. About one-third rely on **official DMO travel guides** (Cyclists 2-in-5), **travel agents** and **newspapers** to obtain travel information. In the main, these are the same sources of information that may be influencing Canadian pleasure travellers who have recently done so, to take trips to British Columbia.

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

(In rank order in each column)

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

With most Cyclists and Mountain Bikers relying on the internet for travel planning and with one-half saying that they *normally* visit **travel websites**, the internet has the greatest reach for cycling-oriented tourism businesses in British Columbia. Both Cyclists and Mountain Bikers are more apt to watch **televised travel shows** (35.4% Cyclists; 27.2% Mountain Bikers) than to read the **travel section** in their daily newspaper (24.6% Cyclists; 17.1% Mountain Bikers). General **travel magazines** such as *Condé Nast* are less popular (19.7% Cyclists; 13.5% Mountain Bikers) than are **outdoor**

activities/sports magazines such as *Backpacker* or *Outdoor Life* among Cyclists (23.5%) and Mountain Bikers (36.2%).

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

TABLE 18: INFORMATION SOURCES FOR TRAVEL PLANNING & GENERAL MEDIA HABITS	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
<i>In rank order by Cyclists</i>				
<u>SOURCES OF TRAVEL PLANNING INFO</u>				
Internet website	72.2%	78.8%	67.2%	57.2%
Advice of friends/relatives	57.2%	60.6%	52.4%	44.9%
Past experience	53.9%	59.7%	52.1%	43.9%
Maps	42.8%	45.9%	39.0%	28.6%
Official DMO travel guides	42.0%	31.3%	27.2%	22.7%
Visitor information centres	37.7%	43.1%	24.7%	20.5%
Travel agent	35.8%	35.5%	36.0%	30.4%
Articles in Newspaper/Magazine	34.0%	29.0%	21.3%	18.4%
Auto club	23.2%	20.7%	19.9%	15.6%
Travel guide books	21.7%	15.6%	18.1%	11.8%
Advertisements in Newspaper/Magazine	15.8%	10.5%	12.8%	12.5%
Travel information in mail	14.8%	4.6%	7.6%	7.8%
Television Programs	9.1%	12.4%	9.0%	6.6%
Trade, travel, sportsmen's shows	6.5%	11.9%	3.2%	2.7%
Electronic newsletters via e-mail	6.2%	5.0%	4.6%	3.7%
Television Advertisements	4.9%	3.7%	4.0%	4.5%
<u>TRAVEL MEDIA</u>				
Frequently read Travel Section daily newspaper	24.6%	17.1%	21.1%	17.9%
Frequently read weekend edition of newspaper	30.7%	18.7%	24.8%	21.9%
Magazines read in typical month				
News magazine	36.8%	31.6%	25.8%	23.6%
General Interest	35.6%	32.1%	33.0%	30.7%
Food & Cooking	28.0%	24.6%	26.2%	26.5%
Entertainment/Music	25.2%	25.2%	31.1%	32.0%
Business/Finance	24.4%	22.6%	19.0%	16.0%
Science and geography	24.1%	33.5%	20.6%	16.3%
Outdoor activities/sports	23.5%	36.2%	15.4%	12.6%
Health, fitness and well living	22.5%	29.0%	24.7%	21.7%
Travel	19.7%	13.5%	11.3%	11.5%
Automobiles/Cycles	17.5%	25.0%	13.7%	13.1%
Normally watch Travel Shows on TV	35.4%	27.2%	33.1%	30.3%
Normally visit Travel websites	48.1%	48.9%	46.3%	39.0%

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

C. Internet Use for Travel Inquiries & Bookings

As noted in the previous section, most Cyclists, Mountain Bikers and tourists who have taken a recent pleasure trip to British Columbia rely on the internet for travel planning. **Destination marketing organization** sites (43.7% Cyclists; 38.3% Mountain Bikers; which is higher than Canadian overnight pleasure travellers as a whole, 34.4%), **hotel/resort** sites (42.8% Cyclists; 52.3% Mountain Bikers) and **airline** sites (33.6% Cyclists; 42.1% Mountain Bikers) are the most commonly used websites among these Canadian tourists who rely on the internet for travel planning (see Table 19). Approximately one-third of these tourists use **Travel** sites such as *Expedia* or *Travelocity* (31.2% Cyclists; 35.1% Mountain Bikers) and **attractions** sites (31.2% Cyclists; 35.2% Mountain Bikers).

Not surprisingly, **booking** on-line is less common than is searching for information on the internet. Nonetheless, over one-half of Canadian Mountain Bikers (55.5%) and over two-fifths of Cyclists (44.8%) claim to have made a travel-related booking on-line over the past two years or so. As their website preferences would suggest, the most common on-line bookings for Cyclists and Mountain Bikers are **accommodation** followed by **air tickets** and, to a lesser degree, car rentals and attractions.

Use of the internet for travel planning and for booking travel arrangements is noticeably more widespread among both Cyclists and Mountain Bikers than among Canadian overnight pleasure travellers to British Columbia, with the exception of Mountain Bikers use of Cruise websites (1.7%), which is lower than Canadian overnight pleasure travellers to B.C. (4.5%). When looking at Canadian overnight pleasure travellers as a whole, their internet use for travel planning and booking for most categories is lower than Cyclists and Mountain Bikers (with the exception of Cruise websites for Mountain Bikers) but is higher than Cyclists use of airline and travel sites.

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total (804)	Total (241)	To British Columbia (7,788)	Any Destination (23,156)
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
Used Internet website for travel planning, past 2 years	72.2%	78.8%	67.2%	57.2%
Internet website(s) used				
<i>(Among Users, in rank order by Cyclists)</i>				
Destination marketing organization	43.7%	38.3%	34.4%	27.7%
Hotel/resort	42.8%	52.3%	40.2%	31.9%
Airline	33.6%	42.1%	39.2%	25.8%
Travel planning/booking	31.2%	35.1%	34.4%	25.6%
Attraction	31.2%	35.2%	23.7%	19.1%
Cruise	6.4%	1.7%	6.2%	4.5%
Motorcoach	2.0%	3.8%	1.6%	1.4%
Other	24.8%	40.3%	17.4%	15.4%
Any Internet Bookings in Past 2 Years	44.8%	55.5%	49.2%	36.6%
<i>(Among All Overnight Pleasure Travellers)</i>				
Items Purchased On-Line				
<i>(Among Users, in rank order by Cyclists)</i>				
Accommodation	36.1%	46.5%	33.8%	25.2%
Air tickets	29.0%	43.1%	39.2%	25.1%
Car rental	16.4%	18.8%	16.5%	9.8%
Rail, bus, boat tickets	11.0%	13.1%	8.7%	5.6%
Tickets for activities/attractions	9.4%	15.5%	11.9%	8.5%
Package deal (2+ items)	5.0%	9.2%	7.7%	5.6%

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

VIII. Other Travel-Related Information

A. Use of Package Deals

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

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

Mountain Bikers are similar to cyclists in their rankings; however, they are more interested in tickets for activities and attractions than they are for transportation at the destination.

TABLE 20: PACKAGE DEALS	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
Frequency of Purchasing Packages in Past 2 Years				
Most/all trips	4.9%	6.1%	5.9%	7.1%
One/some trips	31.9%	26.6%	27.0%	23.9%
No trips/not stated/not sure	63.2%	67.3%	67.1%	68.9%
Desired Components of Packages (Among Purchasers of Packages)				
<i>In rank order by Cyclists</i>	(100%)	(100%)	(100%)	(100%)
Accommodation	82.2%	80.2%	84.4%	81.4%
Transport to destination	73.2%	72.0%	80.2%	72.2%
Transport at destination	50.2%	41.9%	51.9%	49.8%
Food and beverage	46.7%	51.0%	48.5%	52.2%
Tickets for activities/attractions	43.4%	42.3%	43.1%	45.2%
Other	15.6%	17.7%	11.9%	11.7%

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

B. Benefits Sought From Pleasure Travel

At the top of the list of benefits for taking pleasure or vacation trips is a **break from the day-to-day environment** and the ability to **relieve stress** (see Table 21).²⁹ Over three-quarters of Mountain Bikers and over two-thirds of Cyclists attach a high level of importance to these attributes.

Over one-half of Cyclists and Mountain Bikers want their vacations to help **enrich familial relationships** and to be the basis of lasting **memories**. Around one-half would like to see and do **something new and/or different** whilst on vacation. A higher percentage of Mountain Bikers regard **abandoning a fixed schedule** (54.5%) as a highly important benefit of vacations (compared to Cyclists 48.9%). 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.

A higher percentage of Mountain Bikers regard being **physically challenged**³⁰ (49.4%) as highly important compared to Cyclists (30.18%). However, Mountain Bikers are three times more likely and Cyclists are twice as likely as the Canadian travelling public as a whole, and those with recent travel to British Columbia, to rate being **physically challenged** as a highly important benefit for taking pleasure trips.

Summary: 5 Top *Highly Important* Benefits in Rank Order Among Cyclists, Mountain Bikers and Recent Pleasure Tourists to British Columbia and Any Destination³¹

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

²⁹ 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*.

³⁰ *To be challenged physically/feel physically energized.*

³¹ For full array, see Table 21.

While not as widely endorsed as those cited above **keeping family ties alive, gaining knowledge of history, other cultures or other places** and **enriching ones perspective on life** are important benefits of pleasure travel experiences for about two-fifths of Cyclists and Mountain Bikers. Around one-quarter are interested in **stimulating their minds or being intellectually challenged** and/or renew **connections with people (other than family)**.

Benefits with low appeal to Cyclists and Mountain Bikers include, **having stories to tell** once the trip is over, the opportunity to experience **solitude and isolation**, and **being pampered**.

TABLE 21: BENEFITS SOUGHT FROM PLEASURE TRAVEL (Highly important)	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
			To British Columbia	Any Destination
	Total	Total		
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
<i>% Stating "Highly Important"</i>				
<i>In rank order by Cyclists</i>				
Break from day-to-day environment	68.1%	78.1%	66.5%	66.8%
Relax/relieve stress	63.1%	74.5%	65.0%	65.4%
Enrich relationship with partner/children	54.5%	58.5%	54.5%	52.8%
Create lasting memories	53.9%	55.7%	55.6%	52.3%
See/do something new/different	50.7%	50.1%	49.3%	44.0%
No fixed schedule	48.9%	54.5%	42.8%	47.8%
Keep family ties alive	39.3%	42.7%	43.6%	43.5%
Knowledge of history, cultures, places	36.8%	30.2%	27.7%	24.3%
Enrich perspectives	35.4%	40.9%	31.9%	27.7%
Physical challenge	30.1%	49.4%	18.1%	15.7%
Stimulate mind/intellectual challenge	24.8%	23.5%	19.3%	17.4%
Renew personal connections (non-family)	19.1%	25.2%	20.3%	18.9%
Stories to share	15.3%	18.6%	12.4%	12.9%
Solitude and isolation	11.5%	12.9%	8.9%	9.3%
To be pampered	10.1%	6.9%	9.9%	13.3%

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

C. Incidence of Summer/Winter Trips

Almost all Cyclists and Mountain Bikers say that they have taken an overnight pleasure trip during the summer months (95.0%, 95.8%, respectively), this is higher the Canadian travelling public as a whole (86.4%), and those with recent travel to British Columbia (89.7%).

Significantly more Mountain Bikers take winter trips (82.4%) than to Cyclists (70.2%) or the Canadian travelling public as a whole (64%), and those with recent travel to British Columbia (70.4%) (see Table 22).

TABLE 22: INCIDENCE OF SUMMER/ WINTER PLEASURE TRIPS	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
			To British Columbia	Any Destination
	Total	Total		
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
Took Overnight Pleasure Trip in Past 2 Years In . . .				
Summer	95.0%	95.8%	89.7%	86.4%
Winter	70.2%	82.4%	70.4%	64.0%

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

D. Memberships in Various Organizations

Auto club membership is characteristic of over one-third Mountain Bikers (36.2%) and 2-in-5 Cyclists (41.2%) (see Table 23). Over 1-in-3 claim to have memberships in a frequent flyer program, whilst just under 1-in-3 Cyclists (29.1%) and 2-in-5 Mountain Bikers (42.3%) are members of a sports club

For Cyclists these membership levels are *higher* than those of the Canadian travelling public as a whole, but for Mountain Bikers memberships in auto clubs, community service clubs, hobby clubs and book/reading clubs are lower than the Canadian travelling public as a whole.

TABLE 23: MEMBERSHIPS	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
<i>In rank order by Cyclists</i>				
Auto club	41.2%	36.2%	46.5%	38.3%
Frequent flyer program	33.0%	35.8%	38.3%	25.7%
Sports club	29.1%	42.3%	28.9%	23.5%
Hotel/car rental loyalty program	13.0%	15.2%	14.0%	8.8%
Community service club	12.0%	4.7%	11.2%	10.7%
Hobby club	6.2%	5.2%	5.4%	4.6%
Nature/environmental club	5.3%	9.1%	4.6%	3.5%
Book/reading club	4.8%	2.0%	5.4%	4.9%
Travel club	3.1%	6.4%	2.9%	2.1%

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

E. Shelter Used Most Often on Camping Trips

Over three-quarters of Canadian Mountain Bikers (76.1%) and nearly two-thirds of Cyclists (63.4%) and have taken a camping trip in the past two years. Of these Cyclists and Mountain Bikers that camp, they use a *tent* most often for shelter on recent camping trips (Cyclists 45.1%; Mountain Bikers 60.5%) to a much greater extent than they rely on a *motor home or RV* for shelter (Cyclists 3.7%; Mountain Bikers 1.2%).

Use of tents among Cyclists (45.1%) and Mountain Bikers (60.5%) who go camping, is significantly higher than is the case among typical Canadian tourists who have been camping (25.4%) and those who have recently travelled to British Columbia (28.2%).

	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
			To British Columbia	Any Destination
Unweighted base	Total (804)	Total (241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
Took Camping Trip in Past Two Years	63.4%	76.1%	46.2%	40.0%
<i>In rank order by Cyclists</i>				
Tent	45.1%	60.5%	28.2%	25.4%
Travel trailer/ fifth wheel	7.1%	1.7%	7.1%	6.0%
Tent trailer	5.3%	5.5%	2.7%	3.2%
Motor home or RV	3.7%	1.2%	5.0%	3.4%
Truck camper or van	2.2%	7.2%	3.3%	2.0%

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

F. Lodging

A higher percentage of Mountain Bikers, compared to Cyclists, stay in campgrounds while on vacation. Over 3-in-5 Mountain Bikers have stayed at a public campground (60.6%), while nearly 2-in-5 have camped in a private campground (38.1%) or in a wilderness setting (35%). Whilst just under 1-in-2 Cyclists have stayed at a public campground (49.6%), 1-in-3 have camped in a private campground (31.2%) and under 1-in-5 in a wilderness setting (17.1%).

A higher percentage of Mountain Bikers stay at a ski resort or mountain resort (44.5%) than do Cyclists (28.5%). Over one-third of Cyclists (34.4%) and Mountain Bikers prefer lakeside/riverside resorts (35.6%), whilst one-quarter of Cyclists prefer a seaside resort (24.9%) and one-fifth of Mountain Bikers (20.4%).

Use of lodging among Cyclists and Mountain Bikers is higher than is the case among typical Canadian tourists and those who have recently travelled to British Columbia (with the exception of Seaside resorts, which are lower than recent visitors to B.C.).

TABLE 25: LODGING USED WHILE ON AN OVERNIGHT PLEASURE TRIP IN PAST TWO YEARS	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
			To British Columbia	Any Destination
	Total	Total		
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
<i>In rank order by any participation within each subgroup (Cyclists)</i>				
Used Any Lodging	85.5%	89.5%	73.4%	63.8%
Camping				
Public campground in national/ provincial/ state park	49.6%	60.6%	32.8%	25.8%
Private Campground	31.2%	38.1%	22.9%	18.4%
Campsite in wilderness setting	17.1%	35.0%	12.1%	8.4%
Resort/Spa				
Lakeside/riverside resort	34.4%	35.6%	26.6%	22.1%
Ski resort or mountain resort	28.5%	44.5%	23.8%	13.6%
Seaside Resort	24.9%	20.4%	26.5%	20.3%
Health Spa	12.1%	12.0%	6.9%	5.8%
Wilderness/remote lodge				
Wilderness Lodge By Car	13.1%	12.1%	5.6%	5.5%
Remote/Fly-In Wilderness Lodge	3.8%	8.5%	2.7%	1.6%
Remote/Fly-In Wilderness Outpost	0.4%	0.8%	1.0%	0.6%
Motorhome/RV while touring (not camping)	7.4%	5.8%	7.0%	4.5%
Farm or guest ranch	4.1%	12.1%	4.5%	2.9%
Houseboat	3.3%	2.1%	2.5%	1.4%

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

G. Recreation Ownership

More Cyclists (28.3%) and Mountain Bikers (40.1%) have access to cottages and/or cabins in their home province than recent visitors to British Columbia (25.0%) and the Canadian travelling public as a whole (27.9%). Mountain Bikers access to cottages and/or cabins in other provinces (17.5%) is significantly higher than Cyclists (5.2%) and recent visitors to British Columbia (8.1%) and the Canadian travelling public as a whole (4.8%). Just under 1-in-2 Mountain Bikers (47.6%) have regular access to a cottage/cabin whilst 1-in-3 Cyclists (33.2%) have regular access.

Nearly 2-in-5 Mountain Bikers (38.1%) and 1-in-4 Cyclists (25.4%) own canoes or kayaks, ownership of this type of equipment is appreciably higher among Cyclists and Mountain Bikers than it is among recent visitors to British Columbia and the Canadian travelling public as a whole. Over 1-in-10 Cyclists and Mountain Bikers own motorboats (Cyclists 13.8%, Mountain Bikers 10.5%) this is evidence of their preference for water-based activities and staying at riverside or lakeside resorts. However, ownership of a snowmobile or sailboat is less common.

TABLE 25: RECREATION OWNERSHIP	Cyclists (Day/Night)	Mountain Bikers	All Canadian Pleasure Tourists	
	Total	Total	To British Columbia	Any Destination
Unweighted base	(804)	(241)	(7,788)	(23,156)
Weighted, Projected	650,914	204,369	6,002,103	19,946,295
<i>In rank order by Cyclists</i>				
Cottage/Cabin				
Cottage/cabin regular access	33.2%	47.6%	32.1%	32.8%
Cottage/cabin in home province	28.3%	40.1%	25.0%	27.9%
Cottage/cabin other province	5.2%	17.5%	8.1%	4.8%
Cottage/cabin outside Canada	3.0%	7.3%	3.4%	3.1%
Canoe/kayak	25.4%	38.1%	17.3%	15.4%
Motor home, camper, RV	16.5%	19.2%	19.8%	15.3%
Motor boat	13.8%	10.5%	17.2%	17.0%
All-terrain vehicle (ATV)	9.9%	10.7%	11.3%	12.9%
Snowmobile	7.0%	10.1%	7.3%	10.0%
Sailboat	3.3%	6.7%	4.4%	3.1%

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

IX. Appendices

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

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

Alberta Tourism, Parks, Recreation and Culture ³²	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.

³² Formerly *Alberta Economic Development*.

B. Trip Activity Sector Definitions

The following activities as the *main reason* for at least one overnight trip in the past two years are used to define each of the Trip Activity Sectors mentioned in this report. Note that the sectors are NOT mutually exclusive.

Name	Main Activities on At Least One Overnight Trip in Past 2 Years
River Outfitters	White water rafting
Sea Kayaking	Kayaking or canoeing – ocean
Backcountry Lodges	Remote or fly-in wilderness lodge Remote or fly-in wilderness outpost Wilderness lodge you can drive to by car
Cycling/Mountain Biking	Recreational cycling, same day excursion Cycling – as an overnight touring trip Mountain biking
History and Heritage	Archaeological digs Curatorial tours Historical re-enactments (as an actor) Interpretive program at a historic site or national/provincial park Historical replicas of cities or towns with historic re-enactments Children’s museums General history or heritage museums Science or technology museums Military/war museums Paleontological/archaeological sites Well known historic sites or buildings Other historic sites, monuments and buildings
Snowmobiling	Snowmobiling – Day use on organized trail Snowmobiling – As an overnight touring trip
Diving	Scuba diving in lakes/ivers 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

Name	Main Activities on At Least One Overnight Trip in Past 2 Years
Golfing	Golfing – played an occasional game while on a trip
	Golfing – played during a stay at a golf resort for one or more nights
	Golfing – took a package golf tour to play on various courses
Alpine Skiing	Downhill skiing
	Heli-skiing
	Snowboarding
Aboriginal Activities	Aboriginal cultural experiences in a remote or rural setting where you stayed for one or more nights
	Aboriginal heritage attractions (e.g., museums, interpretive centres)
	Aboriginal festivals and events (e.g., Pow Wows)
	Aboriginal cuisine (tasted or sampled)
	Aboriginal arts and crafts shows
	Aboriginal outdoor adventure and/or sports
Fishing	Fishing – fresh water
	Fishing – salt water
Any Self-Guided Overnight Touring	A self-guided tour that was not part of an organized or guided group on which you stayed in different places for one or more nights
Hiking/Trails	Hiking – same day excursion while on a trip of one or more nights
	Hiking/Backpacking in wilderness settings with overnight camping or lodging
Day Hikes	Hiking – same day excursion while on a trip of one or more nights
Backpacking Overnight	Hiking/Backpacking in wilderness settings with overnight camping or lodging
Camping/RVing (NET)	A public campground in a national, state, provincial or municipal park
	A private campground
	A camp site in a wilderness setting (not a campground)
	A motor home or RV while travelling or touring (not a camping trip)
Camping/Tents or RVs	As above, excluding “A motor home or RV while travelling or touring (not a camping trip)”
Camping - Tents	Camping as “Main” and use Tent/Tent Trailer
Camping – RV	Camping as “Main” and use Truck camper/van, Travel trailer/fifth wheel, or Motor Home/RV
RVing (non-camping)	A motor home or RV while travelling or touring (not a camping trip) as “Main” AND NO Camping as “Main” and use Truck camper/van, Travel trailer/fifth wheel, or Motor Home/RV
Non-Campers	NOT Camping – Tents (16C) and NOT Camping – RV (16D)

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

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

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

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%
Private campground	7.3%	22.9%	6.5%	18.4%
Camp site in wilderness setting	5.2%	12.1%	3.8%	8.4%
Alpine skiing	12.8%	17.7%	8.4%	12.1%
Nature park	12.5%	38.8%	11.5%	29.9%
Swimming in lakes	9.3%	40.4%	8.8%	34.5%
Fishing - Fresh water	8.6%	19.6%	10.1%	20.5%
Swimming in oceans	6.8%	33.0%	8.4%	28.2%
Well known natural wonders	6.8%	31.2%	6.3%	23.8%
Hiking				
Hiking - same day excursion	6.5%	33.1%	5.3%	23.8%
Hiking/backpacking as an overnight trip	5.5%	9.1%	4.4%	7.4%
Motor Boating	4.1%	20.6%	3.9%	17.9%
Kayaking/Canoeing - Freshwater	3.3%	11.9%	3.8%	11.6%
Cycling				
Recreational cycling – Same day Excursion	3.1%	13.7%	2.8%	11.0%
Mountain biking	1.9%	7.1%	1.0%	4.0%
Cycling – Overnight Touring Trip	1.6%	2.4%	1.0%	1.4%
Cross Country Skiing	2.6%	7.7%	2.1%	6.0%
Ice Skating	1.7%	11.3%	2.2%	10.1%
Fitness – Jogging/Exercise Outdoors	1.5%	15.7%	1.4%	11.2%

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

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%
General History/Heritage Museum	3.7%	29.7%	3.9%	23.1%
Entertainment				
Amusement park	8.6%	23.7%	8.6%	21.3%
Movies/cinema	3.2%	33.9%	3.7%	27.9%
Free outdoor performances	2.6%	18.5%	3.4%	17.1%
Firework displays	2.5%	15.9%	3.2%	15.7%
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%
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%
Sports				
Spectator Sports (Any)	15.3%	33.8%	13.4%	27.5%
Team Sports, Tournaments, Games (Any)	9.0%	23.5%	8.8%	21.8%

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