



## **RESEARCH & PLANNING**

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

## **Focus on White Water Rafting**

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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 <sup>1</sup>
Parks Canada	The Government of Yukon
Statistics Canada	The Government of Northwest Territories

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## I. Executive Summary

### RIVER RAFTERS ARE A NICHE MARKET FOR BRITISH COLUMBIA

At over 200,000, *River Rafters* – Canadian adults who take vacations *in order to go White Water Rafting* – are an important tourism market. They represent 1-in-91 of the 20.0 million Canadian overnight pleasure travellers to *any destination* and 1-in-63 of the 6 million Canadians who have come to British Columbia for a vacation in the past two years or so.

### BRITISH COLUMBIA ATTRACTS RIVER RAFTERS AT A HIGHER THAN AVERAGE RATE.

While a small niche market, River Rafters are nearly **one-and-half times** as likely to have travelled to British Columbia recently as would be expected given their share of the total Canadian pleasure travel market. At approximately 215,481 the River Rafting sector represents 1% of the 20 million Canadian pleasure travellers to any destination, and at 98,220 this sector represents about 2% of the 6 million Canadian adults with pleasure travel experiences in British Columbia during 2004 or 2005.

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

River Rafters 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, Alberta, Quebec and Ontario.

River Rafting seems to be particularly popular among pleasure tourists who reside in the larger cities such as **Montreal, Vancouver, Edmonton** and **Toronto**. Vancouver is home to about 1-in-12 adult Canadians but significantly more River Rafters (1-in-7) live in the city, whilst Edmonton is home to about 1-in-29 adult Canadians and (1-in-10) River Rafters. In contrast, River Rafters are less likely to live in the Maritimes and the Prairie Provinces.

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

**RIVER RAFTERS TEND TO BE YOUNGER MALES.**

Nearly 6-in-10 River Rafters are between **18 to 34 years old**. 1-in-5 of them are young adults (18 to 24 years), and 2-in-5 are between 25 to 34 years of age. Men may predominate, but 4-in-10 River Rafters are women. Three-fifths of **male** River Rafters are between the ages of 18 and 34 years and more than half of **female** River Rafters are aged 18 to 34 years. Over two-fifths of male River Rafters are aged 25 to 34 years old whereas two-fifths of female River Rafters are aged between 35 and 54 years.

**RIVER RAFTERS ARE EDUCATED AND MIDDLE CLASS.**

Tourists in this niche market tend to be more educated (over two-thirds of River Rafters have a **post-secondary diploma or University degree**), are more apt to be full-time paid employees (nearly two-thirds) and have higher incomes (two-fifths of River Rafters earn between **\$60,000-\$99,999**) than are typical Canadian pleasure tourists.

**OVER 2-IN-5 CANADIAN RIVER RAFTERS HAVE BEEN TO BRITISH COLUMBIA ON A RECENT OVERNIGHT PLEASURE TRIP.**

British Columbia is especially successful in attracting River Rafters (4-in-10) vis à vis the general travelling public in the Canada (3-in-10); however the **United States** clearly leads the market (6-in-10) whilst **Ontario** is the main provincial competitor for Canadian River Rafters (5-in-10).

**A DESTINATION WITH LOTS FOR ADULTS TO SEE AND DO IS A PRIORITY.**

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

**RIVER RAFTERS ARE MULTI-DIMENSIONAL TRAVELLERS BUT TEND TO BE OUTDOOR TOURISTS.**

There is considerable overlap between River Rafters and other outdoor sectors of interest to tourism businesses in British Columbia. As demonstrated by their representation in other activity-based tourism sectors, River Rafters are multi-dimensional travellers. 2-in-5 River Rafters are also **Alpine Skiers** and

**Campers/RVers**, 1-in-3 are **Hikers** and/or **travellers on self-guided tours** and 1-in-5 are **Anglers** and/or **Nordic Skiers**.

In addition to taking trips in order to go white water rafting nearly two-thirds of River Rafters take trips motivated by engaging in at least one **land-based outdoor activity**. Nearly 3-in-5 River rafters are motivated by outdoor **winter activities** they participate in.

Their predisposition toward outdoor activities is evident in the fact that compared to the Canadian travelling public as a whole River Rafters are three times as likely to identify outdoor winter activities and outdoor water-based activities and about twice as likely to identify the land-based activities, as ones that *motivated* recent trips (main reason).

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

#### **MANY OUTDOOR EXPERIENCES ARE POPULAR AMONG RIVER RAFTERS.**

Their higher level of engagement with the outdoors on trips vis à vis the typical Canadian tourist suggests that these rafting enthusiasts represent distinctive markets. Although they particularly enjoy water-based activities they are also partial to land-based activities. River Rafters like to be active while on vacation but they also enjoy taking time to enjoy themselves and relax in nature.

River Rafters are especially interested in **water based activities** (in addition to white water rafting) for recent overnight pleasure trips, 2-in-5 enjoy **sunbathing or sitting on a beach**, close to 1-in-4 enjoy **kayaking/canoeing** (freshwater) and **swimming in lakes** whilst 1-in-5 like **swimming in oceans** and/or **fishing**, especially in fresh water.

**Land-based** travel experiences are also popular motivations for recent overnight pleasure trips, over one-third of River Rafters go **alpine skiing**, about 3-in-10 take trips to go **camping** and 1-in-5 go to **visit a national, provincial or state nature parks** either to visit the parks and/or **go hiking**.

**RIVER RAFTERS ARE NOT ESPECIALLY DRIVEN TO TAKE CULTURAL, CULINARY OR SHOPPING TRIPS.**

By and large, River Rafters 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, spectator sporting events and festivals and events are, however, trip motivators for River Rafters, attracting about 1-in-3 of these tourists.

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

**Casinos** are popular entertainment venues, especially for River Rafters; they could be attracting younger males who participate in this sport. Going to **movies** is a popular trip activity (*any*) among over one-third of River Rafters. Both 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 River Rafters.

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

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

**RIVER RAFTERS ARE MOTIVATED BY TEAM SPORTS, TOURNAMENTS AND GAMES AS WELL AS SPECTATOR SPORTS**

Attending spectator-sporting events (over 1-in-4) and participating in team sports, tournaments and games (over 1-in-5) are trip motivators for River Rafters. The difference between *participation* rates (4-in-10) and *motivation* rates (2-in-10) is not as great as compared to the other categories.

**THE INTERNET TOPS THE CHART AS A TRIP PLANNING TOOL.**

Over 8-in-10 River Rafters rely on the **internet** for travel information; over 6-in-10 rely on their own **past experience** whilst over 5-in-10 rely on anecdotal information provided by **friends and relatives**. 4-in-10 rely on **articles in newspapers and magazines** and 3-in-10 rely on **travel agents, maps and official DMO travel guides**. 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.

**RIVER RAFTERS HAVE VERY FAVOURABLE IMPRESSIONS OF BRITISH COLUMBIA.**

Canadian River Rafters are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel; they accord B.C. a 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** (8.3), **California** (7.8), **Alberta** (7.7), **Nova Scotia** (7.3), **Quebec** (7.3), **New York State** (7.2) and **Ontario** (7.0).

**British Columbia** is given the highest rating as an appealing destination for pleasure travel, and less than six percent of Canadian River Rafters 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 River Rafters seem an ideal market for the province. At present, however, only two percent of Canadian pleasure travellers to the province are River Rafters, suggesting that until more of them are aware of other activities that 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 Travelers' 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).<sup>2</sup>

- **River Rafters**
- Backcountry Lodge Guests
- Recreational Cyclists/Mountain Bikers
- History and Heritage Tourists
- Snowmobilers
- Divers & Snorkellers
- Nordic Skiers & Other Non-Alpine Winter Sport Participants<sup>3</sup>
- 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 **White Water Rafters** (hereafter referred to as **River Rafters**).

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

<sup>3</sup> 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 River Rafters Report

For purposes of this report, Canadian **River Rafters** 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 years<sup>4</sup> 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 White Water Rafting*

Over the last two years, 3% (541,446) of adult Canadians (20.9 million travellers) went white water rafting while on an out-of-town, overnight trip of one or more nights.<sup>5</sup>

People who take a trip *in order to go white water rafting* are only a fraction of tourists who go *white water rafting* on their vacations. Of these 541,446 Canadian tourists, over two hundred thousand (41.9%) say they took a trip *in order to go white water rafting* (as their main reason for taking at least one trip over the last two years).

River rafters 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

<sup>4</sup> 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.

<sup>5</sup> See *Travel Activities and Motivations of Canadian Residents: An Overview*, Tourism BC, May 2007, pg 16 [http://www.tourism.bc.ca/pdf/TAMSCan2006\\_Overview.pdf](http://www.tourism.bc.ca/pdf/TAMSCan2006_Overview.pdf)

### Note to Readers

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

In other words, Canadian River Rafters claim to have taken an overnight trip motivated by white water rafting 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, River Rafters may or may not have participated in white water rafting in a particular country, province or state they have visited recently for an overnight pleasure trip.

- Other popular trip activities
- Trip planning and media behaviour
- Benefits of travel

### III. Overview of Canadian Tourism Activity Sectors

#### A. The Canadian Pleasure Travel Market to British Columbia

Tourism businesses in British Columbia are competing for the attention of about 20 million Canadian adults who are in the market for overnight vacations (see Table A).<sup>6</sup> 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.<sup>7</sup> They may have been on a vacation or visiting friends and relatives while on their pleasure trip to the province. Of overnight travellers who took trips for any reason, just under one-third claim to have visited British Columbia in the past two years or so (30.1% or 6.0 million).

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

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

Most of these recent Canadian visitors to the province – 6 million of them – were on vacation or pleasure trips. In other words, while tourism businesses in British Columbia may be competing for the attention of about 20 million Canadian overnight pleasure travellers, they have attracted 1-in-3 (30.1%) of these tourists to the province over a two-year period. The profiles of various activity-based sectors<sup>8</sup> described in this report are based on Canadians who have taken a recent overnight pleasure trip to *any destination* (20 million) and, where feasible, on the subset of these tourists who have been to British Columbia over the two-year period (6 million).<sup>9</sup>

<sup>6</sup> Adults are defined as individuals 18 years of age or older.

<sup>7</sup> 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.

<sup>8</sup> 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.

<sup>9</sup> Sample sizes of less than 100 records for tourists with recent pleasure trips in British Columbia are not sufficiently robust to warrant analysis.

## B. Tourism Activity Sector Size<sup>10</sup>

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.<sup>11</sup> Examples of these niche markets include **River Rafters** and **Sea Kayakers**. Each of these sectors represents approximately 1-in-100 Canadian overnight pleasure travellers [see Table B].

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

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

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

<sup>1</sup>Sectors 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.

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

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

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

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

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

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

### **C. Tourism Activity Sector Cross-Over**

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

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

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



Chart A: Tourism Activity Sector Cross-Over							
<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 and one-half of **Nordic Skiers** are also categorized as Hikers, Campers, Self-Guided Touring travellers, Alpine Skiers and Cyclists.

In contrast, those in the **History/Heritage** sector do not generally take trips motivated by the outdoor activities highlighted in this series of reports. Instead, there is a relatively low level of duplication (30% to 34%) between these history/heritage enthusiasts and those who take trips in order to do self-guided touring and/or to camp.

Chart B: Tourism Activity Sector Cross-Over								
<i>At least 20% Duplication</i>								
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). **Campers, Golfers and Anglers**, on the other hand, are not widely represented in other tourism activity sectors.

## IV. River Rafters Market Profile

### A. Market Composition

The River Rafting sector is composed of pleasure tourists who participated in white water rafting (an outdoor water activity) as the *main reason* for an overnight trip in the past two years. They represent 1-in-91 of the 20 million Canadian overnight pleasure travellers to *any destination* and 1-in-63 of the 6 million Canadians who have come to British Columbia for a vacation in the past two years or so.

Table C below illustrates the percentage and total number of Canadian River Rafters, as well as Canadian Overnight Pleasure Travellers, to any destination and British Columbia, who indicated that their *main trip purpose* was to participate in white water rafting:

TABLE C: MAIN REASON FOR TAKING OVERNIGHT TRIPS IN 2004- 2005	Total River Rafters	Total Canadian Pleasure Tourists British Columbia	Total Canadian Pleasure Tourists Any Destination
<i>Unweighted Base</i>	(239)	(7,788)	(23,156)
<i>Weighted, Projected</i>	215,481	6,002,103	19,946,295
<i>White Water Rafting</i>	215,481	98,220	215,481
<i>Percentage</i>	100%	1.6%	1.1%

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

## **B. Regional and Demographic Characteristics**

### **1. Place of Residence**

At over 200,000, **River Rafters** – Canadian adults who take vacations *in order to go white water rafting* represent 1-in-91 Canadian overnight pleasure travellers to *any destination* (1.1%) and 1-in-63 of the six million Canadians who have come to British Columbia for a vacation in the past two years or so (1.6%).

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

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

- **River Rafting** seems to be particularly popular among pleasure tourists who reside in the larger cities such as **Montreal** (15.7%), **Vancouver** (14.0%), **Edmonton** (10.5%) and **Toronto** (8.7%).
- **Vancouver** is home to about 1-in-12 adult Canadians (7.7%) but significantly more River Rafters, 1-in-7 (14.0%), live in the city.
- **Edmonton** is home to about 1-in-29 adult Canadians (3.4%) but significantly more River Rafters, 1-in-10 (10.5%), live in the city.
- In contrast, **River Rafters** are less likely to live in the **Maritimes** and the **Prairie Provinces**.

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

TABLE 1: PLACE OF RESIDENCE	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<b>Incidence of River Rafters</b>	<b>100%</b>	<b>1.6%</b>	<b>1.1%</b>
<b>Maritimes</b>			
Halifax	0.5%	0.6%	1.2%
<b>Quebec</b>			
Quebec City	1.7%	0.4%	2.3%
Montreal	15.7%	4.1%	11.6%
<b>Ontario</b>			
Ottawa	3.9%	2.0%	2.9%
Toronto	8.7%	9.1%	16.6%
Hamilton	4.3%	1.3%	2.2%
St. Catharines-Niagara	1.7%	0.4%	1.1%
Kitchener	2.2%	0.7%	1.5%
London	2.2%	0.6%	1.5%
Windsor	2.2%	0.3%	1.0%
<b>Manitoba</b>			
Winnipeg	0.8%	2.4%	2.1%
<b>Saskatchewan</b>			
Regina	0.7%	0.9%	0.6%
Saskatoon	1.5%	1.2%	0.8%
<b>Alberta</b>			
Calgary	1.7%	9.0%	3.7%
Edmonton	10.5%	7.6%	3.4%
<b>British Columbia</b>			
Vancouver	14.0%	20.6%	7.7%
Victoria	1.1%	3.2%	1.1%

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

## 2. Personal and Household Characteristics

### Age & Gender

**River rafters** are concentrated at the **younger** end of the age spectrum. Nearly 6-in-10 are between 18 to 34 years old (58.3%). 1-in-5 of them are young adults (18 to 24 years; 19.2%), and 2-in-5 are between 25 to 34 years of age (39.1%). Under one-fifth are in their mid thirties to mid-forties (17.1%) and mid-forties to mid-fifties (19.2%) and less than five percent are in their mid-fifties to mid-sixties (4.5%). Less than one percent of River Rafters are 65 years of age or older (0.8%) (see Table 2).

There are more **male** (56.8%) than female (43.2%) River Rafters.

Three-fifths of **male** River Rafters are between the ages of 18 and 34 years (60.3%) and one-third are between 35 to 54 years of age (32.1%). Over two-fifths are aged 25 to 34 years old (43.1%). There are much more male (7.5%) than female (2.5%) River Rafters aged 55 years and older.

More than half of **female** River Rafters are aged 18 to 34 years (55.8%) and two-fifths are aged between 35 and 54 years (41.7%). Over one-third are aged 25 to 34 years old (34.0%) and nearly one-quarter are aged 45 to 54 years (24.0%).

TABLE 2: AGE & GENDER	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<b>Age</b>			
18 – 24 Years	19.2%	12.9%	12.7%
25 – 34 Years	39.1%	18.4%	18.8%
35 – 44 Years	17.1%	18.7%	20.4%
45 – 54 Years	19.2%	21.3%	20.2%
55 – 64 Years	4.5%	14.9%	14.4%
65+ Years	0.8%	13.9%	13.5%
<b>Gender</b>			
<b>Men</b>			
18 – 34 Years	60.3%	32.8%	32.2%
35 – 54 Years	32.1%	39.5%	41.0%
55+ Years	7.5%	27.7%	26.7%
<b>Women</b>			
18 – 34 Years	55.8%	29.8%	30.7%
35 – 54 Years	41.7%	40.4%	40.3%
55+ Years	2.5%	29.8%	29.0%

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



### **Education, Occupation and Income**

Tourists in this niche market tend to be more educated and have more disposable income than are typical Canadian pleasure tourists.

Nearly two-fifths of River Rafters have a university degree (37.3%) and 29% have a post-secondary diploma or certificate, whereas 30% of Canadian travellers as a whole are university educated and 21.6% have a post-secondary diploma or certificate.

Not surprisingly in light of the age categories that River Rafters fall in, a higher percentage are employed or are going to school, than are recent visitors to B.C. or the Canadian travelling public as a whole. Due to the challenging nature of this activity a significantly lower proportion of River Rafters are retired, than are recent visitors to B.C. or the Canadian travelling public as a whole.

Over 2-in-5 River Rafters report annual household incomes in the \$60,000 to under \$100,000 bracket (42.3%) whereas only 27% of visitors to British Columbia and the Canadian travelling public as a whole report household income in this bracket. One-fifth of River Rafters fall within the more affluent \$100,000+ bracket (20%), this is less than Canadian travellers as a whole (22.4%) and visitors to B.C. (29.3%).

TABLE 3: EDUCATION, OCCUPATION, INCOME	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<b>Education</b>			
High school diploma or less	19.6%	32.6%	36.7%
Some post-secondary	13.2%	11.9%	10.9%
Post-secondary diploma or certificate	29.2%	19.5%	21.6%
University degree+	37.3%	35.4%	30.0%
<b>Occupation/Work Status</b>			
Work 30+ hrs/week as paid employee	65.4%	58.3%	47.8%
Work as paid employee but part-time (less than 30 hrs/week)	2.2%	6.1%	5.4%
Self-employed/Unpaid worker at a family business	12.5%	12.8%	9.9%
Going to school	11.1%	6.5%	7.2%
Homemaker	3.2%	6.1%	5.5%
Retired	3.1%	17.8%	17.4%
<b>Household Income</b>			
Under \$40,000	14.2%	17.8%	20.6%
\$40,000 - \$59,999	12.0%	13.9%	14.6%
\$60,000 - \$99,999	42.3%	27.0%	27.1%
\$100,000 +	20.0%	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

Nearly 3-in-5 River Rafters live with a spouse or partner (with or without children) (57.2%) and 1-in-5 of them have children 17 years or younger (20.9%) (see Table 4).

Consistent with their age, significantly more River Rafters live with someone other than a spouse/partner or child (23.6%) than to *typical* tourists to British Columbia (13.4%) and any destination (13.6%).

River Rafters are less likely to live with a spouse /partner and children 18 years and older but none under 17 (2.7%) than are *typical* tourists to British Columbia (7.9%) or any destination (7.8%).

TABLE 4: HOUSEHOLD CHARACTERISTICS	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<b>"Do you live:"</b>			
Alone	12.8%	10.3%	10.7%
With spouse/partner & no children 17 years or younger	33.6%	38.6%	38.0%
With spouse/partner & children 17 years or under	20.9%	23.5%	22.0%
With spouse/partner & children 18 years & over but none under 17 yrs	2.7%	7.9%	7.8%
With children and no spouse	5.3%	5.1%	6.7%
Someone other than spouse/child	23.6%	13.4%	13.6%

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

## V. Competitive Destinations

### A. Worldwide Destinations for Overnight Pleasure Trips

When asked to identify the destinations of the overnight pleasure trips they took over a two-year period, virtually all River Rafters indicated that they have taken recent vacations within Canada and 1-in-5 claim to travel *only* within Canada (20.8%) (see Table 5). 2-in-3 of them has been to the United States on a recent overnight pleasure trip (67.9%), suggesting that America is a particularly attractive destination for these river-rafting enthusiasts. This is higher than Canadian pleasure tourists as a whole that have been to any destination recently (50.6%) or visitors to British Columbia (59.8%).

British Columbia is especially successful in attracting River Rafters (45.6%) vis à vis the general travelling public in the Canada (30.1%); however it shares this distinction with Ontario and to a lesser extent Quebec and Alberta.

In fact, **Ontario** is the main provincial competitor for Canadian River Rafters (53.8%). Quebec attracts 44.0% of River Rafters whilst Alberta attracts 42.6%.

The United States clearly leads the market (67.9%) but other foreign competitive destinations for River Rafters include the *Caribbean* (24.1%), *Mexico* (18.8%) and *Europe* (18.6%).

#### Note to Readers

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

In other words, Canadian River Rafters claim to have taken an overnight trip motivated by white water rafting 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, River Rafters may or may not have participated in rafting activities in a particular country, province or state they have visited recently for an overnight pleasure trip.

TABLE 5: COMPETITIVE DESTINATIONS WORLDWIDE*	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<b>Canada</b>			
Newfoundland & Labrador	6.0%	3.4%	4.3%
Prince Edward Island	6.2%	6.3%	7.2%
Nova Scotia	13.1%	10.8%	11.7%
New Brunswick	12.7%	9.0%	12.6%
Quebec	44.0%	23.8%	38.5%
Ontario	53.8%	40.2%	52.8%
Manitoba	5.3%	16.0%	9.1%
Saskatchewan	8.7%	23.2%	11.2%
Alberta	42.6%	57.2%	25.4%
<b>British Columbia</b>	<b>45.6%</b>	<b>100%</b>	<b>30.1%</b>
Yukon	2.8%	3.1%	1.0%
Northwest Territories	0.4%	1.8%	0.7%
Nunavut	0.3%	0.5%	0.3%
<b>United States</b>	<b>67.9%</b>	<b>59.8%</b>	<b>50.6%</b>
<b>Other Countries/Regions</b>			
Mexico	18.8%	18.6%	12.0%
South/Central America	12.5%	5.6%	4.8%
Caribbean	24.1%	14.2%	15.4%
Europe (Incl. the UK and Russia)	18.6%	18.7%	15.6%
Asia	9.1%	8.7%	5.5%
Australia/New Zealand/ Africa	4.2%	4.3%	2.9%
<b>Destination patterns</b>			
<b>Only Canada.</b>	<b>20.8%</b>	<b>28.1%</b>	<b>35.6%</b>
Canada & U.S.A. only	50.0%	54.5%	61.2%
Canada & Other Countries (Not USA)	32.1%	40.2%	49.4%
Canada. & Mexico only	21.5%	30.7%	37.3%
U.S.A. only	0.0%	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 River Rafters the first consideration in planning their most recent **summer** trip was **destination** (44.8%) (see Table 8). At the same time, just under one-fifth begin with the **activities** they wish to participate in (18.2%) and on the **type of vacation experience** they wish to have (17.0%). 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%).

Like summer trips, when planning a **winter** trip most Canadian River Rafters first consideration was the **destination** (39.6%) followed by the **activities** they wished to participate in (28.7%). 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 (8.9%).

Like Canadians with recent pleasure travel experience in British Columbia (63.0%), River Rafters also put a premium on destination choice *per se*, with over 6-in-10 claiming that it is *extremely* or *very important* to them (63.4%).

TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<b>First Consideration for Most Recent Summer Trip</b>			
Start with destination	44.8%	43.2%	37.8%
Start with activities	18.2%	9.6%	10.6%
Start with type of vacation experience	17.0%	18.4%	18.5%
Look for package deal (with out destination)	0.0%	1.1%	1.1%
<b>First Consideration for Most Recent Winter Trip</b>			
Start with destination	39.6%	32.5%	28.4%
Start with activities	28.7%	11.6%	9.1%
Start with type of vacation experience	8.9%	12.8%	11.4%
Look for package deal (with out destination)	0.5%	1.4%	1.9%
<b>Importance of Destination</b>			
Extremely/Very Important	63.4%	63.0%	62.1%
Extremely important	25.6%	23.9%	23.1%
Very important	37.8%	39.1%	39.0%
Average*	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.<sup>12</sup>

River Rafters resemble Canadian overnight pleasure travellers as a whole in terms of the conditions they accord *high importance* when selecting a destination. However, unlike other Canadian tourists, River Rafters put having *many things for adults to see and do* (54.8%) at the top of their list (see Table 9). Over 4-in-10 River Rafters also place high importance on a destination that poses no **safety issues** (43.6%) and has *convenient access by car* (41.6%), whilst 3-in-10 place *no health concerns* (34.8%), the availability of *budget lodging* (32.6%) and having **information available on the internet** (29.5%) as being important factors in destination choice.

**River Rafters** are more apt to take into account the availability of *camping facilities* (26.3%) and *budget accommodation* (32.6%) than are visitors to B.C. (13.9% and 21.5% respectively) or Canadian travellers as a whole (12.8% and 21.7% respectively). River Rafters lodging preferences may be a function of their age and life stage. As younger tourists, River Rafters can be expected to be more budget conscious. Another factor influenced by their age is that they are more interested in having *information available on the internet* (29.5%) than are visitors to B.C. (25.7%) or Canadian travellers as a whole (24.6%).

### Summary: Considerations Deemed *Highly Important* By At Least 1-in-4 River Rafters<sup>13</sup>

	<u>River Rafters</u>	<u>Canadian Pleasure Tourists</u>	
		<u>To British Columbia</u>	<u>Any Destination</u>
Lots for adults to see/do	54.8%	39.2%	38.0%
Feeling safe	43.6%	65.1%	65.9%
Convenient access by car	41.6%	36.2%	43.3%
No health concerns	34.8%	46.8%	49.9%
Budget accommodation	32.6%	21.5%	21.7%
Information available on internet	29.5%	25.7%	24.6%
Mid Range accommodation	26.9%	29.6%	29.6%
Camping	26.3%	13.9%	12.8%

<sup>12</sup> “Highly important”, “Somewhat important”, and “Of no importance”.

<sup>13</sup> See Table 9 for full array of considerations deemed “highly important” and “of no importance”.



Being familiar with the culture and language, luxury accommodation, being disabled-person friendly, having great shopping and having friends and relative there, are not rated as being of high importance for River Rafters.

TABLE 9: CONDITIONS FOR SELECTING A DESTINATION

	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<i>Bold rows are proportion stating "Highly Important" In rank order by River Rafters</i>			
<b>Lots for adults to see/do</b>	<b>54.8%</b>	<b>39.2%</b>	<b>38.0%</b>
Of no importance	3.3%	7.2%	7.3%
<b>Feeling safe</b>	<b>43.6%</b>	<b>65.1%</b>	<b>65.9%</b>
Of no importance	6.2%	3.1%	3.5%
<b>Convenient access by car</b>	<b>41.6%</b>	<b>36.2%</b>	<b>43.3%</b>
Of no importance	11.30%	13.6%	11.5%
<b>No health concerns</b>	<b>34.8%</b>	<b>46.8%</b>	<b>49.9%</b>
Of no importance	13.2%	8.8%	8.2%
<b>Budget accommodation</b>	<b>32.6%</b>	<b>21.5%</b>	<b>21.7%</b>
Of no importance	22.1%	23.4%	23.8%
<b>Information available on internet</b>	<b>29.5%</b>	<b>25.7%</b>	<b>24.6%</b>
Of no importance	20.1%	24.7%	27.1%
<b>Direct access by air</b>	<b>27.7%</b>	<b>31.6%</b>	<b>28.9%</b>
Of no importance	12.9%	17.0%	21.7%
<b>Mid-range accommodation</b>	<b>26.9%</b>	<b>29.6%</b>	<b>29.6%</b>
Of no importance	8.4%	12.6%	12.8%
<b>Camping</b>	<b>26.3%</b>	<b>13.9%</b>	<b>12.8%</b>
Of no importance	38.1%	48.7%	50.6%
<b>Low cost packages available</b>	<b>21.6%</b>	<b>20.9%</b>	<b>22.8%</b>
Of no importance	30.3%	27.3%	23.1%
<b>Very different culture than own</b>	<b>16.2%</b>	<b>9.1%</b>	<b>8.9%</b>
Of no importance	28.7%	39.6%	39.7%
<b>Lots for children to see/do</b>	<b>15.5%</b>	<b>13.7%</b>	<b>16.4%</b>
Of no importance	64.6%	62.0%	56.5%
<b>Convenient access by train/bus</b>	<b>9.6%</b>	<b>11.4%</b>	<b>13.1%</b>
Of no importance	38.0%	40.3%	39.3%
<b>Familiar with culture &amp; language</b>	<b>7.4%</b>	<b>10.8%</b>	<b>13.6%</b>
Of no importance	36.0%	28.6%	26.9%
<b>Luxury accommodation</b>	<b>7.0%</b>	<b>5.7%</b>	<b>6.8%</b>
Of no importance	56.3%	57.5%	54.5%
<b>Disabled-person-friendly</b>	<b>5.4%</b>	<b>3.6%</b>	<b>5.6%</b>
Of no importance	81.2%	79.6%	73.8%
<b>Great shopping</b>	<b>5.1%</b>	<b>11.1%</b>	<b>12.3%</b>
Of no importance	60.5%	45.0%	43.2%
<b>Have friends or relatives there</b>	<b>2.3%</b>	<b>10.2%</b>	<b>11.1%</b>
Of no importance	70.4%	59.6%	59.0%

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 River Rafters are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel; they accord B.C. a rating of 9.2 on a ten-point scale (see Table 10).<sup>14</sup> Though significantly lower than B.C.'s, moderately favourable ratings are accorded a host of destinations, including **Hawaii** (8.3), **California** (7.8), **Alberta** (7.7), **Nova Scotia** (7.3), **Quebec** (7.3), **New York State** (7.2) and **Ontario** (7.0).

#### Summary: Most Appealing Destinations among River Rafters<sup>15</sup>

	Canadian Pleasure Tourists		
	<u>River Rafters</u>	<u>To British Columbia</u>	
			<u>Total</u>
<b>British Columbia</b>	9.2	9.0	8.8
Hawaii	8.3	8.1	8.3
California	7.8	7.4	8.4
Alberta	7.7	7.3	8.5
Nova Scotia	7.3	7.2	8.4
Quebec	7.3	6.7	9.0
Ontario	7.0	6.6	9.2

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

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

<sup>14</sup> 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.

<sup>15</sup> See Table 10 for full array of average ratings and proportion unable/unwilling to rate each destination.

TABLE 10: APPEAL OF VARIOUS DESTINATIONS

	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<i>Bold rows are average ratings**</i>			
<b>British Columbia</b>	<b>9.2</b>	<b>9.0</b>	<b>8.8</b>
No rating provided	5.7%	2.1%	12.4%
<b>Newfoundland &amp; Labrador</b>	<b>6.6</b>	<b>6.8</b>	<b>7.9</b>
No rating provided	14.9%	19.5%	21.5%
<b>Nova Scotia</b>	<b>7.3</b>	<b>7.2</b>	<b>8.4</b>
No rating provided	10.5%	14.5%	16.3%
<b>New Brunswick</b>	<b>6.6</b>	<b>6.5</b>	<b>8.3</b>
No rating provided	11.0%	16.8%	16.9%
<b>Prince Edward Island</b>	<b>6.9</b>	<b>7.2</b>	<b>8.3</b>
No rating provided	9.7%	15.5%	16.6%
<b>Quebec</b>	<b>7.3</b>	<b>6.7</b>	<b>9.0</b>
No rating provided	4.4%	11.1%	10.2%
<b>Ontario</b>	<b>7.0</b>	<b>6.6</b>	<b>9.2</b>
No rating provided	3.9%	8.0%	8.0%
<b>Manitoba</b>	<b>4.8</b>	<b>4.8</b>	<b>7.9</b>
No rating provided	10.7%	14.6%	21.1%
<b>Saskatchewan</b>	<b>4.9</b>	<b>4.8</b>	<b>7.9</b>
No rating provided	10.4%	13.4%	20.7%
<b>Alberta</b>	<b>7.7</b>	<b>7.3</b>	<b>8.5</b>
No rating provided	7.5%	6.8%	15.3%
<b>Yukon</b>	<b>6.7</b>	<b>6.4</b>	<b>7.5</b>
No rating provided	12.3%	19.5%	24.9%
<b>Northwest Territories</b>	<b>6.0</b>	<b>5.8</b>	<b>7.4</b>
No rating provided	13.1%	21.1%	25.7%
<b>Nunavut</b>	<b>5.4</b>	<b>5.0</b>	<b>7.2</b>
No rating provided	13.5%	24.3%	28.1%
<b>New York State</b>	<b>7.2</b>	<b>6.2</b>	<b>8.4</b>
No rating provided	6.0%	14.1%	16.0%
<b>Colorado</b>	<b>6.7</b>	<b>6.1</b>	<b>7.6</b>
No rating provided	12.6%	19.9%	24.5%
<b>Florida</b>	<b>6.7</b>	<b>6.5</b>	<b>8.7</b>
No rating provided	5.5%	12.2%	13.5%
<b>California</b>	<b>7.8</b>	<b>7.4</b>	<b>8.4</b>
No rating provided	6.5%	10.5%	16.0%
<b>Hawaii</b>	<b>8.3</b>	<b>8.1</b>	<b>8.3</b>
No rating provided	6.8%	12.5%	17.1%
<b>Arizona</b>	<b>6.4</b>	<b>6.5</b>	<b>7.8</b>
No rating provided	10.3%	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 River Rafters' lists for having *many good reasons* to visit on a pleasure trip (see Table 11).<sup>16</sup> Specifically, **British Columbia** tops the list with nearly 9-in-10 River Rafters 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 River Rafters (86.9%) *many good reasons* to visit. Other destinations with many reasons to visit, according to River Rafters, are Hawaii (65.8%), California (62.2%), Quebec (46.8%), Alberta (46.5%), New York State (44.9%) and Florida (44.7%).

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

<u>River Rafters</u>	<u>Canadian Pleasure Tourists</u>				
		<u>To British Columbia</u>	<u>Total</u>		
B.C.	87%	B.C.	83%	B.C.	65%
Hawaii	66%	Hawaii	56%	Hawaii	55%
California	62%	California	50%		

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

<sup>16</sup> Consumers were asked to indicate which of three statements best described their feelings about taking a pleasure trip to the same destinations for which they rated *appeal* (see previous section). The statements were *there are NO good reasons to travel to this destination*, *SOME good reasons* and *MANY good reasons to travel to this destination*.

TABLE 11: NUMBER OF REASONS TO VISIT  
VARIOUS DESTINATIONS

	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<i>% stating "MANY" good reasons to visit In Rank order by River Rafters</i>			
<b>British Columbia</b>	<b>86.9%</b>	<b>83.4%</b>	<b>64.6%</b>
Hawaii	65.8%	55.5%	54.6%
California	62.2%	49.8%	47.1%
Quebec	46.8%	35.3%	41.6%
Alberta	46.5%	45.3%	34.9%
New York State	44.9%	30.8%	30.4%
Florida	44.7%	35.0%	40.4%
Ontario	39.6%	35.4%	43.3%
Yukon	35.2%	22.1%	16.9%
Newfoundland & Labrador	32.9%	30.3%	27.4%
Prince Edward Island	32.0%	33.8%	32.0%
Colorado	30.9%	17.8%	18.7%
Nova Scotia	30.6%	33.5%	32.4%
New Brunswick	25.1%	21.3%	22.9%
Arizona	22.4%	22.1%	22.9%
Northwest Territories	19.7%	15.5%	12.3%
Nunavut	11.3%	11.0%	9.1%
Saskatchewan	5.6%	10.1%	7.7%
Manitoba	4.3%	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*.<sup>17</sup>

#### 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 **white water rafting** 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 white water rafting 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* River Rafters 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 River Rafters provided in this chapter are appended.

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<sup>17</sup> Presumably, “these trips” are those on which the specific activity took place.

## **B. Trip Activities & Drivers**

### **1. River Rafters' Cross-Over with Other Trip Activity Sectors**

As demonstrated by their representation in other activity-based tourism sectors, River Rafters are multi-dimensional travellers.<sup>18</sup>

2-in-5 River Rafters are also **Alpine Skiers** and **Campers/RVers**, 1-in-3 are **Hikers** and/or **travellers on self-guided tours** and 1-in-5 are **Anglers** and/or **Nordic Skiers** (see Table 12).

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

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

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

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<sup>18</sup> 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 River Rafters provided in this chapter are appended.



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

	River Rafters	All Canadian Pleasure Tourists		
	Total	To British Columbia	Any Destination*	Index to All Canadian Tourists** River Rafters
Unweighted base	(239)	(7,788)	(23,156)	
Weighted, Projected	215,481	6,002,103	19,946,295	
<i>In Rank order by River Rafters</i>				
River Rafters	100%	1.6%	1.1%	n/a
Alpine Skiers	40.6%	14.9%	9.7%	419
Campers/RVers	37.8%	17.7%	16.1%	235
Self-Guided Overnight Touring Travellers	34.7%	22.4%	17.7%	196
Hikers	29.2%	9.4%	7.6%	384
Anglers	20.9%	10.9%	11.4%	183
Nordic Skiers	19.2%	3.8%	3.2%	600
History and Heritage Tourists	17.1%	12.2%	12.1%	141
Golfers	12.3%	7.2%	5.6%	220
Cycling/Mountain Biking	10.7%	4.8%	3.8%	282
Divers & Snorkellers	7.8%	3.4%	2.3%	339
Aboriginal Activity Tourists	7.6%	3.7%	2.8%	271
Snowmobilers	7.1%	1.9%	2.5%	284
Backcountry Lodge Guests	5.8%	2.6%	2.9%	200
Sea Kayakers	3.9%	1.4%	0.8%	488

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 River Rafters in activity sector divided by All Canadian Pleasure (Any Destination) in activity sector, multiplied by 100.

## 2. Major Trip Activity Groups

Like most tourists, River Rafters take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.<sup>19</sup>

- In addition to taking trips in order to go white water rafting nearly two-thirds of River Rafters (63%) take trips motivated by engaging in at least one **land-based outdoor activity**.<sup>20</sup>
- Nearly 3-in-5 River rafters are motivated by the type of **accommodation** they stay at (58%) and/or outdoor **winter activities** (57%) they participate in.
- 1-in-3 River Rafters are motivated by the **Performing Arts, cultural** interests such as going to well-known historic sites, museums, as well as to engage in **entertainment** activities such as theme parks and movies.
- 1-in-4 River Rafters have taken recent overnight pleasure trips in order to go to **spectator sporting events** such as professional baseball or football games, to attend **Festivals and Events** and be motivated by **shopping** and **dining-related** experiences as well as.

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, more River Rafters *participated* in at least one performing arts experience while on a recent overnight pleasure trip (65%) than claim to have taken a trip motivated by one of these activities (35%). However, when it comes to outdoor winter based activities the difference between *participation* rates (6-in-10) and *motivation* rates (5-in-10) is not as great as compared to the other categories.

Shopping and dining experiences are especially likely to be “one-of-many” trip activities (87%) but the driving force behind a trip for relatively few segment members (24%). Similarly, over one-half of River Rafters went to a festival or event on a recent trip but only one-quarter of them took the trip in order to do so.

Compared to *all* Canadian overnight pleasure travellers, River Rafters are three times as likely to identify outdoor winter activities and outdoor water-based activities<sup>21</sup> and

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<sup>19</sup> 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 River Rafters provided in this chapter are appended.

<sup>20</sup> Key activities included in the *land-based* segment include cycling, hiking, bird watching and viewing land-based animals.

<sup>21</sup> All River Rafters are included in the *water-based outdoor activity segment* because “white water rafting” is one of the activities used to define members of this group. Other key activities included in the *water-based* segment include fishing, kayaking/canoeing, sailing, swimming and diving/snorkelling.

about twice as likely to identify the land-based activities, as ones that *motivated* recent trips (main reason). This market is clearly motivated by outdoor activities.

**Summary: Activity Groups named by at least about 1-in-3 River Rafters as ones that motivated (main reason) a recent overnight trip.**

<u>Major Activity Group</u>	<u>Main Reason</u>		<u>Any Participation</u>	
	<b>River Rafters</b>	All Canadian Pleasure Tourists	<b>River Rafters</b>	All Canadian Pleasure Tourists
Outdoor Water-Based	100%	33%	100%	65%
Outdoor Land Based	63%	29%	89%	67%
Accommodation Stayed at	58%	28%	87%	64%
Outdoor Winter Activities	57%	17%	67%	30%
Performing Arts	35%	18%	65%	44%
Exhibits/Historic Sites/Museums	33%	17%	72%	59%
Theme/Amusement Parks/ Movies	31%	15%	62%	47%

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

TABLE 13: MAJOR ACTIVITY GROUPS – MAIN & ANY	River Rafters	
	Main Reason	Any Participation
Unweighted base	(239)	(239)
Weighted, Projected	215,481	215,481
<i>In Rank order - Main Reason</i>		
Outdoor Water Based Activities	100%	100%
Outdoor Land Based Activities	62.5%	88.5%
Accommodation Stayed at	57.8%	87.1%
Outdoor Winter Activities	56.6%	66.7%
Performing Arts	34.6%	64.8%
Exhibits/Historic Sites/Museums	33.2%	71.7%
Theme/Amusement Parks/Movies	30.5%	61.5%
Spectator Sports	26.9%	45.3%
Festivals & Events	25.7%	53.2%
Shopping/Dining/Food Related	23.8%	87.3%
Team Sports/Tournaments/Games	21.8%	39.4%
Hands-on Learning Activities	13.6%	27.0%
Aboriginal Experiences	7.6%	25.2%
Air Based Activities	1.3%	5.1%

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

### 3. Individual Trip Activities: The Outdoors

Many outdoor experiences are popular among River Rafters (see Table 14).<sup>22</sup> Although they particularly enjoy water-based activities they are also partial to land-based activities. River Rafters like to be active while on vacation but they also enjoy taking time to enjoy themselves and relax in nature.

#### *Water based Activities:*

- **River Rafters** are especially interested in water based activities for recent overnight pleasure trips, 2-in-5 enjoy sunbathing or sitting on a beach, close to 1-in-4 enjoy kayaking/canoeing (freshwater) and swimming in lakes whilst 1-in-5 like swimming in oceans and/or fishing, especially in fresh water.

#### *Land Based Activities:*

- Land-based travel experiences are also popular motivations for recent overnight pleasure trips, over one-third of River Rafters go alpine skiing. About 3-in-10 take trips to go camping and 1-in-5 go to visit a national, provincial or state nature parks either to visit the parks and/or go hiking.

Compared to the typical Canadian overnight pleasure traveller, River Rafters are more likely to identify *active* outdoor activities such as 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 river rafting enthusiasts represent distinctive markets.

**Summary: Outdoor activities named by at least about 1-in-3 River Rafters as ones that *motivated* (main reason) a recent overnight trip.**

<u>Outdoor Activities</u>	<u>Main Reason</u>		<u>Any Participation</u>	
	<b>River Rafters</b>	All Canadian Pleasure Tourists	<b>River Rafters</b>	All Canadian Pleasure Tourists
White Water Rafting	100%	1%	100%	3%
Sunbathing or sitting on a beach	40%	18%	69%	40%
Alpine Skiing	35%	8%	39%	12%
Camping – Public campground	32%	12%	56%	26%

<sup>22</sup> 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 River Rafters provided in this chapter are appended.

These high levels of differentiation from typical Canadian travellers are further evidence of River Rafters 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*	River Rafters	
	Main Reason	Any Participation
Unweighted base	(239)	(239)
Weighted, Projected	215,481	215,481
<i>In Rank order - Main Reason</i>		
White Water Rafting	100%	100%
Sunbathing or sitting on a beach	39.7%	69.0%
Alpine Skiing	34.9%	39.4%
<b>Camping</b>		
Public campground	31.7%	55.8%
Private campground	17.7%	40.2%
Kayaking/canoeing – Fresh water	23.8%	36.9%
Swimming in lakes	23.4%	68.4%
Hiking Same day excursion	20.1%	47.2%
Nature park	19.6%	44.7%
Swimming in oceans	19.0%	49.5%
Fishing – Fresh water	15.5%	31.7%
Motor Boating	14.8%	38.1%
Well known natural wonders	13.7%	34.5%
Golfing –Occasional Game	4.7%	31.6%

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

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

By and large, River Rafters 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.<sup>23</sup> Entertainment-oriented activities in general, and particularly performing arts, spectator sporting events and festivals and events are, however, trip motivators for River Rafters (see Table 15), attracting about 1-in-3 of these tourists.

##### Culture

River Rafters are more inclined to engage in a variety of cultural and heritage activities as "one-of-many" trip activities than they are to be motivated to take overnight pleasure trips in order to engage in these activities. For example, about one-half have **strolled around a city to observe its buildings and architecture** on recent pleasure trips but less than one-sixth have taken a trip in order to engage in these activities. Similar patterns are evident for seeing **historic sites**, well know and other. These tourists are more than five times as likely to engage in these activities *as one of their trip activities* as they are to consider them as the driving force behind the trip.

##### Entertainment

**Casinos** are popular entertainment venues, especially for River Rafters (Main, 13%; Any, 36%); they could be attracting younger males who participate in this sport. Going to **movies** is a popular trip activity (*any*) among over one-third of River Rafters. Both 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 River Rafters.

##### Dining

Similar to many entertainment-oriented activities, visiting **local outdoor cafes** (Main, 9%; Any, 47%), dining out at **restaurants offering local ingredients and cuisine** (Main, 7%; Any, 74%), and dining in **high-end restaurants (not with an international reputation)** (Main, 4%; Any, 40%) are much more common trip experiences (*any*) than trip drivers for River Rafters.

##### Shopping

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

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<sup>23</sup> 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 River Rafters provided in this chapter are appended.

### Sports

Attending spectator-sporting events (over 1-in-4) and participating in team sports, tournaments and games (over 1-in-5) are trip motivators for River Rafters. The difference between *participation* rates (4-in-10) and *motivation* rates (2-in-10) is not as great as compared to the other categories.

### Comparison to Canadian Pleasure Travellers

As noted in the previous section, compared to *all* Canadian overnight pleasure travellers, River Rafters are more likely to engage in outdoor activities or take trips for these activities. These rafting 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). River Rafters are about twice as likely to be motivated to participate in team sports, tournaments and games, to attend spectator sports, to attend arts performances, to stroll around a city to see architecture, to go to a casino, and to go to festivals and events, than are *typical* Canadian pleasure travellers. They are three times more likely to dine in an outdoor local café (as a main trip motivator) than are *typical* Canadian pleasure travellers.

**Summary: Top ten *other activities* named by at least about 1-in-3 River Rafters as ones that *they participated in* on a recent overnight trip.**

	<u>Main Reason</u>		<u>Any Participation</u>	
	River Rafters	All Canadian Pleasure Tourists	River Rafters	All Canadian Pleasure Tourists
<u>Other Activities</u>				
Performing Arts (any)	35%	18%	65%	44%
Spectator Sports (any)	27%	13%	45%	28%
Festivals& Events	26%	16%	53%	44%
Team Sports, Games, Tournaments (any)	22%	9%	40%	22%
Strolling in a city to see architecture	14%	8%	56%	41%
Casino	13%	6%	36%	26%
Local outdoor cafes	9%	3%	47%	39%
Historic Sites – Well Known	8%	6%	37%	30%
Dining - restaurants offering local ingredients & recipes	7%	6%	74%	57%
Movies/Cinema	6%	4%	36%	28%

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*	River Rafters	
	Main Reason	Any Participation
Unweighted base	(239)	(239)
Weighted, Projected	215,481	215,481
<i>In rank order by main reason within each subgroup</i>		
<b>Cultural &amp; Heritage</b>		
Any Performing Arts	34.6%	64.8%
Festival & Events	25.7%	53.2%
Strolling around a city to see architecture	14.4%	56.1%
Historic sites - well known	7.7%	37.0%
Historic sites - other	4.6%	39.6%
<b>Entertainment</b>		
Casino	12.9%	35.9%
Movies/cinema	6.4%	36.4%
<b>Food &amp; Dining</b>		
Local outdoor cafes	8.5%	47.3%
Dining – restaurants offering local ingredients and recipes	7.1%	73.7%
Dining - other high-end (not with international reputation)	4.4%	40.4%
<b>Shopping</b>		
Clothing, shoes, jewellery	4.9%	58.1%
Bookstores or music stores	2.6%	52.1%
Local arts & crafts studios	2.5%	44.9%
<b>Sports</b>		
Spectator Sports (Any)	26.9%	45.3%
Team Sports, Tournaments, Games (Any)	21.8%	39.4%

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 River Rafters as ones they participated in (any) on a recent overnight trip.

## 5. Overnight Cruises & Organized Group Tours

Most River Rafters are not recent overnight cruise passengers (see Table 16). Of the 1-in-10 River Rafters 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**, River Rafters who have gone on an overnight-organized tour display slightly more preference for tours to *single* (15.5%) versus *multiple* destinations (14.8%). They are also more likely to participate in these tours than area recent Canadian travellers to B.C. (single location 8.2%, multiple locations 12.2%) or any other destination (single location 7.9%; multiple locations 10.2%).

More River Rafters claim to have taken **self-directed** same day touring trips over a two-year period (57.3%) than self-directed day tours that are not organized (34.7%).

Favoured themes for organized day excursions include tours around the countryside and/or a city, wilderness or outdoor tours and sightseeing cruises. River Rafters are about twice as likely to go on tours around the countryside, the city, sightseeing cruises, casinos and factories, as are *typical* Canadian pleasure travellers. They are three times more likely to go on wilderness or outdoor tours and/or tours of wineries, and are five times more likely to go on airplane or helicopter tours than are *typical* Canadian pleasure travellers.

TABLE 16: CRUISES/GROUP TOURS	River Rafters	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
	Total		
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<b>Took any overnight cruise in past 2 years</b>			
<b>Type of Cruise/Destination</b>			
<b>Ocean (Net)</b>	<b>9.6%</b>	<b>12.6%</b>	<b>8.8%</b>
Ocean – Caribbean	7.5%	5.9%	5.3%
Ocean – Other	1.9%	5.1%	3.2%
Ocean – Alaska	0.8%	4.0%	1.7%
<b>Lake or River cruise (Net)</b>	<b>7.1%</b>	<b>3.0%</b>	<b>4.4%</b>
St. Lawrence River	2.6%	0.7%	1.9%
Other lake/River	5.5%	2.2%	2.3%
Great Lakes	1.2%	0.4%	0.8%
<b>Touring</b>			
Overnight group tour – multiple locations	14.8%	12.2%	10.2%
Overnight group tour –Single Location	15.5%	8.2%	7.9%
Organized group tour – same day	35.1%	28.3%	21.9%
Self-Directed tour – same day	57.3%	34.8%	28.6%
Self-Directed tour – not organized	34.7%	22.4%	17.7%
Unspecified same day tours	0.5%	1.9%	2.9%
<b>Type of Organized Day Tour</b>			
<i>(In rank order by River Rafters)</i>			
Countryside	43.2%	26.4%	22.0%
City	40.3%	28.4%	22.9%
Wilderness/outdoor	37.3%	15.6%	12.7%
Sightseeing cruise (day excursion)	30.4%	15.9%	12.8%
Wineries	14.8%	8.7%	5.6%
Casino	13.4%	6.6%	6.5%
Airplane/helicopter (pilot or passenger)	8.6%	3.0%	1.9%
Factory	6.1%	4.2%	2.6%

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

## VII. Trip Planning

### A. Who Does the Planning?

The majority of River Rafters 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 River Rafter or is shared with other household members.

TABLE 17: TRAVEL PLANNING	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<b>Frequency of personal involvement in trip planning, past 2 years</b>			
All	58.2%	65.9%	61.8%
Most	26.6%	16.7%	15.1%
Some	12.2%	9.6%	10.3%
None/not stated	3.0%	7.8%	12.8%
<b>Main responsibility for trip planning</b>			
Respondent	40.4%	37.8%	34.9%
Shared with other household member	29.8%	28.7%	27.6%
Spouse/partner	10.1%	15.0%	13.5%
Other/not stated/not involved in travel planning	18.3%	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 River Rafters, the internet tops the chart (see Table 18). Over 8-in-10 of these tourists rely on the **internet** for travel information; over 6-in-10 rely on their own **past experience** whilst over 5-in-10 rely on anecdotal information provided by **friends and relatives**. 4-in-10 rely on **articles in newspapers and magazines** and 3-in-10 rely on **travel agents, maps** and **official DMO travel guides**. 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.

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

(In rank order in each column)

<u>River Rafters</u>	<u>Canadian Pleasure Tourists</u>	
	<u>To British Columbia</u>	<u>Total</u>
Internet website	Internet website	Internet website
Past experience	Advice of friends/relatives	Advice of friends/relatives
Advice of friends/relatives	Past experience	Past experience
Articles in Newspaper/Magazine	Maps	Travel Agent
Travel Agent	Travel agent	
Maps		
Official DMO travel guides		

With most River Rafters relying on the internet for travel planning and with 3-in-5 saying that they *normally* visit **travel websites**, the internet has the greatest reach for rafting-oriented tourism businesses in British Columbia. River Rafters are more apt to watch **televised travel shows** (45.8%) than to read the **travel section** in their daily newspaper (13.6%).

General **travel magazines** such as *Condé Nast* are less popular (19.1%) than are **outdoor activities/sports magazines** such as *Backpacker* or *Outdoor Life* among River Rafters (25.0%) but readership for both is higher amongst Rafters than it is for recent visitors to B.C. or the Canadian travelling public as a whole. **Entertainment and music magazines** are the most popular magazines amongst River Rafters (33.2%).

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

TABLE 18: INFORMATION SOURCES FOR TRAVEL PLANNING & GENERAL MEDIA HABITS	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<i>In rank order by River Rafters</i>			
<b><u>SOURCES OF TRAVEL PLANNING INFO</u></b>			
Internet website	82.5%	67.2%	57.2%
Past experience	64.5%	52.1%	43.9%
Advice of friends/relatives	57.4%	52.4%	44.9%
Articles in Newspaper/Magazine	42.8%	21.3%	18.4%
Travel agent	37.4%	36.0%	30.4%
Maps	35.5%	39.0%	28.6%
Official DMO travel guides	31.0%	27.2%	22.7%
Travel guide books	28.9%	18.1%	11.8%
Visitor information centres	26.6%	24.7%	20.5%
Advertisements in Newspaper/Magazine	20.9%	12.8%	12.5%
Auto club	19.9%	19.9%	15.6%
Television Programs	11.6%	9.0%	6.6%
Travel information in mail	11.6%	7.6%	7.8%
Television Advertisements	9.2%	4.0%	4.5%
Electronic newsletters via e-mail	7.6%	4.6%	3.7%
Trade, travel, sportsmen's shows	6.8%	3.2%	2.7%
<b><u>TRAVEL MEDIA</u></b>			
Frequently read Travel Section daily newspaper	13.6%	21.1%	17.9%
Frequently read weekend edition of newspaper	21.1%	24.8%	21.9%
<b>Magazines read in typical month</b>			
Entertainment/Music	33.2%	31.1%	32.0%
General Interest	27.1%	33.0%	30.7%
Outdoor activities/sports	25.0%	15.4%	12.6%
Fashion & Beauty	24.2%	21.6%	23.3%
Science and geography	24.1%	20.6%	16.3%
Food & Cooking	22.3%	26.2%	26.5%
Home & Garden	19.7%	23.8%	24.5%
Automobiles/Cycles	19.2%	13.7%	13.1%
Business/Finance	19.1%	19.0%	16.0%
Travel	19.1%	11.3%	11.5%
Normally watch Travel Shows on TV	45.8%	33.1%	30.3%
Normally visit Travel websites	60.0%	46.3%	39.0%

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

### **C. Internet Use for Travel Inquiries & Bookings**

As noted in the previous section, most River Rafters and tourists who have taken a recent pleasure trip to British Columbia rely on the internet for travel planning. **Airline** sites (48.8%), **hotel/resort** sites (47.7%), **Travel** sites such as *Expedia* or *Travelocity* (45.1%) and **Destination marketing organization** sites (40.9%), 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 **attractions** sites (31.7%).

Not surprisingly, **booking** on-line is less common than is searching for information on the internet. Nonetheless, over 3-in-5 River Rafters claim to have made a travel-related booking on-line over the past two years or so (60.3%). As their website preferences would suggest, the most common on-line bookings for River Rafters are **air tickets**, followed by **accommodation** 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 River Rafters than among Canadian overnight pleasure travellers to British Columbia and Canadian overnight pleasure travellers as a whole.

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<b>Used Internet website for vacation information, past 2 years</b>	<b>82.5%</b>	<b>67.2%</b>	<b>57.2%</b>
<b><u>Internet website(s) used</u></b>			
<i>(Among Users, in rank order by River Rafters)</i>			
Airline	48.8%	39.2%	25.8%
Hotel/resort	47.7%	40.2%	31.9%
Travel planning/booking	45.1%	34.4%	25.6%
Destination marketing organization	40.9%	34.4%	27.7%
Attraction	31.7%	23.7%	19.1%
Cruise	7.0%	6.2%	4.5%
Motorcoach	3.5%	1.6%	1.4%
Other	25.8%	17.4%	15.4%
<b>Any Internet Bookings in Past 2 Years</b>	<b>60.3%</b>	<b>49.2%</b>	<b>36.6%</b>
<i>(Among All Overnight Pleasure Travellers)</i>			
<b><u>Items Purchased On-Line</u></b>			
<i>(Among Users, in rank order by River Rafters)</i>			
Air tickets	(100%)	(100%)	(100%)
Accommodation	52.8%	39.2%	25.1%
Car rental	37.3%	33.8%	25.2%
Tickets for activities/attractions	16.8%	16.5%	9.8%
Rail, bus, boat tickets	14.7%	11.9%	8.5%
Package deal (2+ items)	10.8%	8.7%	5.6%
	8.7%	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 River Rafters (see Table 20). 1-in-20 say they relied on a package deal for *all* or *most* of their trips over the past two years or so and a further 1-in-3 have used package deals for *one* or *some* of these trips.

**River Rafters** 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.

TABLE 20: PACKAGE DEALS	River Rafters	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
	Total		
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<b>Frequency of Purchasing Packages in Past 2 Years</b>			
Most/all trips	4.8%	5.9%	7.1%
One/some trips	28.9%	27.0%	23.9%
No trips/not stated/not sure	66.3%	67.1%	68.9%
<b>Desired Components of Packages</b> (Among Purchasers of Packages)			
<i>In rank order by River Rafters</i>			
Accommodation	89.8%	84.4%	81.4%
Transport to destination	73.2%	80.2%	72.2%
Transport at destination	61.5%	51.9%	49.8%
Food and beverage	53.2%	48.5%	52.2%
Tickets for activities/attractions	46.0%	43.1%	45.2%
Other	14.1%	11.9%	11.7%

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

## B. Benefits Sought From Pleasure Travel

At the top of the list of benefits for taking pleasure or vacation trips for nearly 8-in-10 River Rafters is a **break from the day-to-day environment** and for 7-in-10 the ability to **relieve stress** (see Table 21).<sup>24</sup>

6-in-10 River Rafters want their vacations to be the basis of lasting **memories** and to do **something new and/or different** whilst on vacation. Around one-half would like to help **enrich familial relationships**, whilst 4-in-10 regard **abandoning a fixed schedule** and **enriching their perspectives on life** as highly important benefits of vacations. By and large, these are the same benefits of vacations deemed to be highly important by recent Canadian tourists to British Columbia and Canadian overnight pleasure travellers in general.

A higher percentage of River Rafters regard being **physically challenged**<sup>25</sup> (32.3%) as a highly important benefit for taking pleasure trips, compared to the Canadian travelling public as a whole (15.7%), and those with recent travel to British Columbia (18.1%).

### Summary: 5 Top *Highly Important* Benefits in Rank Order Among River Rafters and Recent Pleasure Tourists to British Columbia and Any Destination<sup>26</sup>

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

While not as widely endorsed as those cited above **keeping family ties alive** and **gaining knowledge of history, other cultures or other places** are important benefits of pleasure travel experiences for about 3-in-10 River Rafters. Around one-quarter are interested in **having stories to tell** once the trip is over, **stimulating their minds or being intellectually challenged** and/or renew **connections with people (other than family)**. Benefits with low appeal to River Rafters include, the opportunity to experience **solitude and isolation**, and **being pampered**.

<sup>24</sup> 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*.

<sup>25</sup> *To be challenged physically/feel physically energized.*

<sup>26</sup> For full array, see Table 21.

TABLE 21: BENEFITS SOUGHT FROM PLEASURE TRAVEL

	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<i>% Stating "Highly Important"</i>			
<i>In rank order by River Rafters</i>			
Break from day-to-day environment	78.9%	66.5%	66.8%
Relax/relieve stress	69.8%	65.0%	65.4%
Create lasting memories	64.6%	55.6%	52.3%
See/do something new/different	60.8%	49.3%	44.0%
Enrich relationship with partner/children	53.4%	54.5%	52.8%
No fixed schedule	47.0%	42.8%	47.8%
Enrich perspectives on life	42.4%	31.9%	27.7%
Physical challenge	32.3%	18.1%	15.7%
Keep family ties alive	32.0%	43.6%	43.5%
Knowledge of history, cultures, places	29.2%	27.7%	24.3%
Stories to share	24.7%	12.4%	12.9%
Stimulate mind/intellectual challenge	22.0%	19.3%	17.4%
Renew personal connections (non-family)	21.8%	20.3%	18.9%
To be pampered	13.2%	9.9%	13.3%
Solitude and isolation	10.4%	8.9%	9.3%

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 River Rafters say that they have taken an overnight pleasure trip during the summer months (94.9%), this is higher than the Canadian travelling public as a whole (86.4%), and those with recent travel to British Columbia (89.7%).

Significantly more River Rafters take winter trips (88.5%) than the Canadian travelling public as a whole (64%), and those with recent travel to British Columbia (70.4%) (see Table 22).

	River Rafters	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<b>Took Overnight Pleasure Trip in Past 2 Years</b>			
<b>In . . .</b>			
Summer	94.9%	89.7%	86.4%
Winter	88.5%	70.4%	64.0%

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

### D. Memberships in Various Organizations

**Auto club membership** is characteristic of close to 2-in-5 River Rafters (38.0%) (see Table 23). Close to 1-in-3 claim to have memberships in sports club (28.1%) and close to 1-in-4 are members of a frequent flyer program (23.1%)

Compared to the Canadian travelling public as a whole and recent visitors to B.C., River Rafters memberships are lower (with the exceptions of community service clubs, nature/environmental clubs and hobby clubs).

TABLE 23: MEMBERSHIPS	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<i>In rank order by River Rafters</i>			
Auto club	38.0%	46.5%	38.3%
Sports club	28.1%	28.9%	23.5%
Frequent flyer program	23.1%	38.3%	25.7%
Community service club	13.7%	11.2%	10.7%
Hotel/car rental loyalty program	8.4%	14.0%	8.8%
Nature/environmental club	7.9%	4.6%	3.5%
Hobby club	5.6%	5.4%	4.6%
Book/reading club	3.0%	5.4%	4.9%
Travel club	1.1%	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 two-thirds of Canadian River Rafters have taken a camping trip in the past two years (68.3%). Of these River Rafters that camp, they use a *tent* most often for shelter on recent camping trips (55.1%) to a much greater extent than they rely on a *motor home or RV* for shelter (4.3%).

Use of tents among River Rafters (55.1%) 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%).

	River Rafters	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<b>Took Camping Trip in Past Two Years</b>	<b>68.3%</b>	<b>46.2%</b>	<b>40.0%</b>
<i>In rank order by River Rafters</i>			
Tent	55.1%	28.2%	25.4%
Motor home or RV	4.3%	5.0%	3.4%
Tent trailer	3.8%	2.7%	3.2%
Travel trailer/fifth wheel	3.2%	7.1%	6.0%
Truck camper or van	2.0%	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 River Rafters, compared to recent visitors to B.C. and the Canadian travelling public as a whole, stay in campgrounds while on vacation. Over one-half of River Rafters have stayed at a public campground (55.8%), while 2-in-5 have camped in a private campground (40.2%) and 1-in-5 in a wilderness setting (22.0%).

More River Rafters stay at a ski resort or mountain resort (42.6%) than lakeside/riverside resorts (28.9%), or seaside resorts (28.0%).

Use of lodging among River Rafters is higher than is the case among typical Canadian tourists and those who have recently travelled to British Columbia (with the exception of remote/fly in wilderness lodge/outpost, motorhome/RV and farm or guest ranch, which are lower than recent visitors to B.C.).

TABLE 25: LODGING USED WHILE ON AN OVERNIGHT PLEASURE TRIP IN PAST TWO YEARS	River Rafters	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<i>In rank order by any participation within each subgroup (River Rafters)</i>			
<b>Used Any Lodging</b>	<b>87.1%</b>	<b>73.4%</b>	<b>63.8%</b>
<b>Camping</b>			
Public campground in national/provincial/state park	55.8%	32.8%	25.8%
Private Campground	40.2%	22.9%	18.4%
Campsite in wilderness setting	22.0%	12.1%	8.4%
<b>Resort/Spa</b>			
Ski resort or mountain resort	42.6%	23.8%	13.6%
Lakeside/riverside resort	28.9%	26.6%	22.1%
Seaside Resort	28.0%	26.5%	20.3%
Health Spa	10.7%	6.9%	5.8%
<b>Wilderness/remote lodge</b>			
Wilderness Lodge By Car	8.9%	5.6%	5.5%
Remote/Fly-In Wilderness Lodge	2.6%	2.7%	1.6%
Remote/Fly-In Wilderness Outpost	0.6%	1.0%	0.6%
<b>Houseboat</b>	7.0%	2.5%	1.4%
<b>Motorhome/RV while touring (not camping)</b>	4.8%	7.0%	4.5%
<b>Farm or guest ranch</b>	3.7%	4.5%	2.9%

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.



## G. Recreation Ownership

More River Rafters have regular access to **cottages and/or cabins** (43.8%) than do recent visitors to British Columbia (32.1%) do and the Canadian travelling public as a whole (32.8%). River Rafter's access to cottages and/or cabins in their home province (39.7%) is significantly higher than recent visitors to British Columbia (25.0%) and the Canadian travelling public as a whole (27.9%).

Nearly 1-in-3 River Rafters (29.0%) own canoes or kayaks and 1-in-5 own motor boats (20.4%), ownership of these types of equipment is appreciably higher among River Rafters than it is among recent visitors to British Columbia and the Canadian travelling public as a whole. 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	River Rafters	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
	Total		
Unweighted base	(239)	(7,788)	(23,156)
Weighted, Projected	215,481	6,002,103	19,946,295
<i>In rank order by River Rafters</i>			
<b>Cottage/Cabin</b>			
Cottage/cabin regular access	43.8%	32.1%	32.8%
Cottage/cabin in home province	39.7%	25.0%	27.9%
Cottage/cabin outside Canada	6.7%	3.4%	3.1%
Cottage/cabin other province	5.9%	8.1%	4.8%
Canoe/kayak	29.0%	17.3%	15.4%
Motor boat	20.4%	17.2%	17.0%
All-terrain vehicle (ATV)	17.8%	11.3%	12.9%
Motor home, camper, RV	16.5%	19.8%	15.3%
Snowmobile	9.8%	7.3%	10.0%
Sailboat	4.5%	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 <sup>27</sup>	Ontario Tourism Marketing Partnership
Atlantic Canada Tourism Partnership	Parks Canada
Canadian Tourism Commission	Quebec Ministry of Tourism
Department of Canadian Heritage	Statistics Canada
Government of Northwest Territories	Tourism British Columbia
Government of Yukon	Tourism Manitoba
Ontario Ministry of Tourism	Tourism Saskatchewan

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

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

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

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

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<sup>27</sup> 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
<b>River Outfitters</b>	White water rafting
<b>Sea Kayaking</b>	Kayaking or canoeing – ocean
<b>Backcountry Lodges</b>	Remote or fly-in wilderness lodge Remote or fly-in wilderness outpost Wilderness lodge you can drive to by car
<b>Cycling/Mountain Biking</b>	Recreational cycling, same day excursion Cycling – as an overnight touring trip Mountain biking
<b>History and Heritage</b>	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
<b>Snowmobiling</b>	Snowmobiling – Day use on organized trail Snowmobiling – As an overnight touring trip
<b>Diving</b>	Scuba diving in lakes/rivers Scuba diving in sea/ocean Snorkelling in lakes or rivers Snorkelling in sea/ocean
<b>Nordic Ski/Related Activities</b>	Cross country skiing Cross country or back country skiing as an overnight touring trip Snow shoeing Dog sledding Ski Jouring
<b>Golfing</b>	Golfing – played an occasional game while on a trip

Name	Main Activities on At Least One Overnight Trip in Past 2 Years
	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
<b>Alpine Skiing</b>	Downhill skiing
	Heli-skiing
	Snowboarding
<b>Aboriginal Activities</b>	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
<b>Fishing</b>	Fishing – fresh water
	Fishing – salt water
<b>Any Self-Guided Overnight Touring</b>	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
<b>Hiking/Trails</b>	Hiking – same day excursion while on a trip of one or more nights
	Hiking/Backpacking in wilderness settings with overnight camping or lodging
<b>Day Hikes</b>	Hiking – same day excursion while on a trip of one or more nights
<b>Backpacking - Overnight</b>	Hiking/Backpacking in wilderness settings with overnight camping or lodging
<b>Camping/RVing (NET)</b>	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)
<b>Camping/Tents or RVs</b>	As above, excluding “A motor home or RV while travelling or touring (not a camping trip)”
<b>Camping - Tents</b>	Camping as “Main” and use Tent/Tent Trailer
<b>Camping – RV</b>	Camping as “Main” and use Truck camper/van, Travel trailer/fifth wheel, or Motor Home/RV
<b>RVing (non-camping)</b>	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
<b>Non-Campers</b>	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
<b>Outdoor Land Based Activities</b>	33.7%	76.7%	29.4%	66.9%
<b>Outdoor Water Based Activities</b>	34.2%	70.8%	33.3%	65.3%
<b>Accommodation Stayed at</b>	30.8%	73.4%	28.3%	63.8%
<b>Outdoor Winter Activities</b>	19.9%	34.8%	16.8%	29.7%
<b>Performing Arts</b>	16.6%	47.7%	17.6%	44.3%
<b>Festivals &amp; Events</b>	15.3%	49.7%	15.8%	44.1%
<b>Theme/Amusement Parks/Movies</b>	14.5%	54.5%	15.4%	46.7%
<b>Shopping/Dining/Food Related</b>	13.0%	89.2%	16.0%	83.6%
<b>Exhibits/Historic Sites/Museums</b>	17.4%	68.2%	17.4%	58.5%
<b>Spectator Sports</b>	15.3%	33.8%	13.4%	27.5%
<b>Team Sports/Tournaments/Games</b>	9.0%	23.5%	8.8%	21.8%
<b>Aboriginal Experiences</b>	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%
<b>Camping</b>				
Public campground	13.2%	32.8%	11.6%	25.8%
Private campground	7.3%	22.9%	6.5%	18.4%
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 - same day excursion	6.5%	33.1%	5.3%	23.8%
Golfing – Occasional Game	4.6%	21.6%	3.5%	15.9%
Motor Boating	4.1%	20.6%	3.9%	17.9%
Kayaking/Canoeing - Freshwater	3.3%	11.9%	3.8%	11.6%
White water rafting	1.6%	4.5	1.1%	2.7%

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

TABLE A3: OTHER INDIVIDUAL ACTIVITIES – MAIN &amp; 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>				
<b>Cultural &amp; Heritage</b>				
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%
<b>Entertainment</b>				
Casino	4.9%	26.9%	5.9%	25.6%
Movies/cinema	3.2%	33.9%	3.7%	27.9%
<b>Food &amp; Dining</b>				
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%
<b>Shopping</b>				
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%
<b>Sports</b>				
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 River Rafters as ones they participated in (any) on a recent overnight trip.