



RESEARCH & PLANNING

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

Focus on Sea Kayakers

March 2009

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

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



Acknowledgments

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

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

TAMS was a partnership of the following organizations:

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

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

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

I. Executive Summary

SEA KAYAKERS ARE A NICHE MARKET FOR BRITISH COLUMBIA

At over 150,000, *Sea Kayakers* – Canadian adults who take vacations *in order to go kayaking or canoeing on oceans* – are an important tourism market. They represent 1-in-125 of the 20.0 million Canadian overnight pleasure travellers to *any destination* and 1-in-71 of the 6 million Canadians who have come to British Columbia for a vacation during 2004 or 2005.

BRITISH COLUMBIA ATTRACTS SEA KAYAKERS AT A HIGHER THAN AVERAGE RATE.

While a small niche market, Sea Kayakers are nearly twice as likely to have travelled to British Columbia recently as would be expected given their share of the total Canadian pleasure travel market. At approximately 84,351, this sector represents about 1.4% of the 6 million Canadian adults with pleasure travel experiences in British Columbia during 2004 or 2005.

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

Sea Kayakers live in every province (with the exception of Manitoba) but not surprisingly, are apt to reside in provinces where opportunities to participate in the sport are most prevalent – such as Western and Central Canada

Sea Kayakers seems to be particularly popular among pleasure tourists who reside in the larger cities in the West and Central Canada, such as **Vancouver, Calgary, Montreal, Quebec City, and Toronto**. In contrast, Sea Kayakers are less likely to live the Prairie Provinces and in the Maritimes.

Regional marketing efforts to attract Sea Kayakers from Central Canada may be challenging, particularly in light of increased airfares, as these tourists are concentrated in Montreal, Quebec City and Toronto. However, the closer proximity of the **Albertan market** should be exploited.

SEA KAYAKERS TEND TO BE WOMEN IN THEIR MID-TWENTIES TO MID-THIRTIES AND MID-FORTIES TO MID-FIFTIES.

At close to 6-in-10, women may predominate, but 4-in-10 Sea Kayakers are men. All age groups are represented, but they tend to be concentrated at the younger end (25-34 years) and the middle (45-54 years) of the age spectrum and once a traveller reaches 65 years of age, he or she is unlikely to seek sea kayaking experiences.

SEA KAYAKERS ARE AFFLUENT AND HIGHLY EDUCATED.

Sea Kayakers are more **educated** and **affluent** than Canadian pleasure visitors to British Columbia and to any destination. Over 1-in-3 has post-secondary or higher education (diploma or degree) and 1-in-2 have a university degree. Over 3-in-10 Sea Kayakers report annual household incomes **over \$100,000**.

Not surprisingly in light of the age categories that Sea Kayakers fall in, a high percentage are **employed** and significantly fewer Sea Kayakers are retired compared to recent visitors to B.C. or the Canadian travelling public as a whole.

BRITISH COLUMBIA IS SUCCESSFUL AT ATTRACTING SEA KAYAKERS

British Columbia is more successful in attracting Sea Kayakers (55%) vis à vis the general travelling public in Canada (30%).

QUEBEC AND ONTARIO ARE THE MAIN COMPETITORS FOR THESE TRAVELLERS.

Quebec (63%) and **Ontario** (56%) - are the main provincial competitors for Canadian Sea Kayakers.

The **United States** clearly leads the International market (64%) but other foreign competitive destinations for Sea Kayakers include the *Caribbean, Mexico* and *Europe*.

Sea Kayakers are more likely than *typical* Canadian tourists to any destination, to travel to other countries and regions, they are particularly more likely to visit **South and Central America** than are Canadian pleasure visitors to B.C. or Canadian travellers as a whole to any destination.

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

Most Sea Kayakers start a trip planning process with a *destination* in mind, although 1-in-5 of these tourists start their trip planning process with a focus on the **activities** they want to enjoy while on their trip and the **type of vacation experience** they wish to have. The destination should have *many things for adults to see and do*, be *safe*, offer *mid-range accommodation*, offer *convenient access by car*, and provide *camping*.

SEA KAYAKERS ARE MULTI-DIMENSIONAL TRAVELLERS BUT TEND TO BE OUTDOOR TOURISTS.

There is considerable overlap between Sea Kayakers and other outdoor sectors of interest to tourism businesses in British Columbia². Over 1-in-2 also Hikers and around 1-in-3 are Campers/RVers, Alpine Skiers and/or travellers on self-guided overnight tours, whilst 1-in-4 are Nordic Skiers and/or cyclists or mountain bikers.

Sea Kayakers are more apt than the Canadian travelling public as a whole to be members of *other* activity-based segments: they are eight times as likely to be Nordic Skiers; they are over six times as likely to be Hikers, Cyclists/Mountain bikers and/or Divers. They are five times as likely to be River Rafters, and they are three times as likely to be Alpine Skiers. Sea Kayakers are twice as likely to be Backcountry Lodge Guests and Campers/RVers than are the Canadian travelling public as a whole.

MANY OUTDOOR EXPERIENCES ARE POPULAR AMONG SEA KAYAKERS.

As their predisposition to kayak and go to sun/sea destinations might suggest, they are especially interested in *water based travel experiences*: 2-in-5 Sea Kayakers also enjoy kayaking or canoeing in fresh water, 3-in-10 enjoy sunbathing or sitting on a beach, while nearly 1-in-5 Sea Kayakers enjoy swimming in lakes and oceans and viewing whales or marine wildlife.

Sea Kayakers are also motivated by *land based activities*: 2-in-5 Sea Kayakers enjoy hiking as a same day excursion, while 1-in-3 enjoy hiking or backing overnight. Close to 3-in-10 are motivated by Alpine skiing, 1-in-4 Sea Kayakers take trips to visit a national, provincial or state nature parks (25%) either to visit the parks or to camp in them (26%) while Cycling as a same day excursion motivates around 1-in-5 Sea Kayakers to take an overnight pleasure trip.

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

SEA KAYAKERS ARE NOT ESPECIALLY DRIVEN TO TAKE CULTURAL, CULINARY OR SHOPPING TRIPS.

By and large, Sea Kayakers 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. For example, over half have strolled around a city to observe its buildings and architecture on a recent pleasure trip but only about 1-in-7 have taken a trip in order to do so. Similar patterns are evident for seeing well-known historic sites and going to general history museums. These tourists are about five times as likely to go to historic sites and eight times as likely to go to general history museums, and as one of their trip activities as they are to make these attractions the driving force behind the trip.

Entertainment-oriented activities are not as likely to have motivated Sea Kayakers to take trips, as are cultural activities. These kayakers are drawn by rock & roll or popular concerts and by taking in a movie. 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 Sea Kayakers.

Shopping for apparel, books or music, gourmet foods and local arts and crafts is a common trip pastime for Sea Kayakers but tends not to be the motivation for their recent overnight pleasure travel. Fewer than 1-in-5 Sea Kayakers are motivated by sporting events.

THE INTERNET TOPS THE CHART AS A TRIP PLANNING TOOL.

Of the many sources of travel information available to Sea Kayakers the **internet** (77%) tops the chart. Over 6-in-10 of these tourists rely on their own **past experience** and 5-in-10 rely on anecdotal information provided by **friends and relatives** for their travel information. Close to 1-in-2 rely on **maps**, while around 2-in-5 **rely** on official **DMO travel guides, travel agents and articles in a newspaper/magazine**. Over 1-in-3 rely on **Visitor Information Centres**, while 3-in-10 rely on **travel guidebooks**. 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.

SEA KAYAKERS HAVE VERY FAVOURABLE IMPRESSIONS OF BRITISH COLUMBIA.

Canadian Sea Kayakers are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel; they accord B.C. a rating of 8.9 on a ten-point scale. Though lower than B.C.'s, moderately favourable ratings are accorded a host of destinations, including Hawaii (8.4), Nova Scotia (7.7), Quebec (7.6), California (7.6), Prince Edward Island (7.5), Newfoundland and Labrador (7.1) and the Yukon (7.0).

British Columbia is given the highest rating as an appealing destination for pleasure travel, and only 5% of Canadian Sea Kayakers refrained from rating the province, thus indicating that Canadian travellers are knowledgeable about the destination and its touristic appeal.

DISTANCE MAY POSE A CHALLENGE FOR ATTRACTING SEA KAYAKERS TO BRITISH COLUMBIA.

With their particular constellation of outdoor interests, Sea Kayakers seem an ideal market for the province. At present, however, only one percent of Canadian pleasure travellers to the province are Sea Kayakers. Regional marketing efforts to attract Sea Kayakers may be challenging, particularly in light of air access challenges (such as increased airfares and reduced capacity), as many of these tourists are concentrated in Central Canada. However, the closer proximity of the Albertan rubber tire/drive market could be exploited.

TABLE OF CONTENTS

I. Executive Summary.....	3
II. Introduction.....	9
A. BACKGROUND AND OBJECTIVES.....	9
B. THE CANADIAN SEA KAYAKERS REPORT	11
III. Overview of Canadian Tourism Activity Sectors	12
A. THE CANADIAN PLEASURE TRAVEL MARKET TO BRITISH COLUMBIA	12
B. TOURISM ACTIVITY SECTOR SIZE.....	13
C. TOURISM ACTIVITY SECTOR CROSS-OVER.....	15
IV. Sea Kayakers Market Profile.....	19
A. MARKET COMPOSITION.....	19
B. REGIONAL AND DEMOGRAPHIC CHARACTERISTICS	20
1. <i>Place of Residence</i>	20
2. <i>Personal and Household Characteristics</i>	22
3. <i>Household Composition</i>	26
V. Competitive Destinations.....	27
A. WORLDWIDE DESTINATIONS FOR OVERNIGHT PLEASURE TRIPS	27
B. DESTINATIONS: ROLES & RATINGS.....	29
1. <i>Importance of Destination</i>	29
2. <i>Importance of Conditions in Destination Choice</i>	31
3. <i>Appeal of Various Destinations</i>	34
4. <i>Number of Good Reasons to Visit Various Destinations</i>	36
VI. Activities on Overnight Trips.....	38
A. INTRODUCTION.....	38
B. TRIP ACTIVITIES & DRIVERS.....	39
1. <i>Sea Kayakers' Cross-Over with Other Trip Activity Sectors</i>	39
2. <i>Major Trip Activity Groups</i>	41
3. <i>Individual Trip Activities: The Outdoors</i>	44
4. <i>Individual Trip Activities: Culture, Entertainment, Dining, Shopping & Sports</i>	47
5. <i>Overnight Cruises & Organized Group Tours</i>	50
VII. Trip Planning.....	52
A. WHO DOES THE PLANNING?.....	52
B. TRAVEL INFORMATION SOURCES & TRAVEL MEDIA	53
C. INTERNET USE FOR TRAVEL INQUIRIES & BOOKINGS	56
VIII. Other Travel-Related Information.....	58
A. USE OF PACKAGE DEALS.....	58
B. BENEFITS SOUGHT FROM PLEASURE TRAVEL	59
C. INCIDENCE OF SUMMER/WINTER TRIPS	61
D. MEMBERSHIPS IN VARIOUS ORGANIZATIONS	62
E. SHELTER USED MOST OFTEN ON CAMPING TRIPS.....	63
F. LODGING	64
G. RECREATION OWNERSHIP	66
IX. Appendices	67
A. ABOUT THE TRAVEL ACTIVITIES AND MOTIVATION SURVEY (TAMS)	67
B. TRIP ACTIVITY SECTOR DEFINITIONS	68
C. TRIP ACTIVITIES – RECENT B.C. AND ANY DESTINATION PLEASURE TRAVELLERS	70

II. Introduction

A. Background and Objectives

The Travel Activities and Motivation Survey (TAMS) survey examines the recreational activities and travel habits of Canadians and Americans. The survey examines out-of-town, overnight travel behaviour of one or more nights from 2004 to 2005 and provides detailed information on Travellers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

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

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

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

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

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

Visitors engage in tourism activities based on their personal interests and requirements, selecting from the many and varied types of experiences offered in their destinations. They can be grouped into market segments or *activity-based* sectors, reflecting the experiences they seek when they travel – to British Columbia or elsewhere.

Whether in its cities, towns or countryside, British Columbia clearly offers a wide array of tourism experiences and attracts tourists from many different sectors. By learning more about Canadians who are in the market for some of these travel experiences, British Columbia's tourism businesses can more effectively target their products and marketing efforts to attract tourists.

To support these efforts, *Experiences B.C. Sector Development Program*, Tourism British Columbia (TBC) and other stakeholders selected the following array of activity-based sectors as the focus of a series of Canadian tourist profiles based on the recently released 2006 Travel Activities and Motivation Survey.³

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

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

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

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

B. The Canadian Sea Kayakers Report

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

People who take a trip *in order to* engage in sea kayaking are only a fraction of tourists who go kayaking on their vacations. Of the 20.9 million Canadian Travellers, 4% (783,552) went sea kayaking, while on an out-of-town, overnight trip of one or more nights.⁶

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

The report provides the following information:

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

Note to Readers

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

In other words, Canadian Sea Kayakers claim to have taken an overnight trip motivated by kayaking 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, Sea Kayakers may or may not have been kayaking in a particular country, province or state they have visited recently for an overnight pleasure trip

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

⁶ See *Travel Activities and Motivations of Canadian Residents: An Overview*, Tourism BC, May 2007, pg 16 http://www.tourism.bc.ca/pdf/TAMSCan2006_Overview.pdf

III. Overview of Canadian Tourism Activity Sectors

A. The Canadian Pleasure Travel Market to British Columbia

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

Over two-fifths (43%) of the Canadian overnight pleasure travel market, or about 8.6 million tourists, have had *some* experience with British Columbia over the past decade.⁸ They may have been on a vacation or visiting friends and relatives while on their pleasure trip to the province. Of the overnight travellers who took trips for any reason, just under one-third claim to have visited British Columbia in the past two years or so (2004 and 2005) (30% or 6.0 million).

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

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

Most of these recent Canadian visitors to the province – 6 million of them – were on vacation or pleasure trips. In other words, while tourism businesses in British Columbia may be competing for the attention of about 20 million Canadian overnight pleasure travellers, they have attracted 3-in-10 (30%) of these tourists to the province over a two-year period. The profiles of various activity-based sectors⁹ described in this report are based on Canadians who have taken a recent overnight pleasure trip to *any destination* (20 million) and, where feasible, on the subset of these tourists who have taken an overnight pleasure trip to/in to British Columbia over the two-year period (6 million).¹⁰

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

⁸ Since fieldwork for the TAMS study was conducted between January and June 2006, the “past ten years” likely refers to 1995 through 2005 and the “past two years” likely refers to 2004 and 2005. See footnote in Section II.B for more information on interpreting these recall periods.

⁹ Sectors are defined in terms of selective activities as the *main reason* for a trip because these “dedicated” markets represent a crystallization of the interests and characteristics that might attract more casual participants to the activity (*any* participation). It is recognized that the sectors included in the profiles cover only a fraction of the experiences British Columbia offers its tourists.

¹⁰ Sample sizes of less than 100 records for tourists with recent pleasure trips in British Columbia are not sufficiently robust to warrant analysis.

B. Tourism Activity Sector Size¹¹

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

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

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

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

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

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

¹² Sample sizes of less than 100 records for tourists with recent pleasure trips in British Columbia are not sufficiently robust to warrant analysis.

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

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

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

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

C. Tourism Activity Sector Cross-Over

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

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

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

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

Generally, duplication of between one-third to one-half is most common between smaller *niche* outdoor sectors and larger, more broadly defined sectors such as History/Heritage, Camping and Self-Guided Touring. For example, between one-third to almost one-half of **Nordic Skiers** are also categorized as Hikers, Campers, Self-Guided Touring travellers, Alpine Skiers and Cyclists.

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

Chart B: Tourism Activity Sector Cross-Over <i>At least 20% Duplication</i>								
<i>Level of Duplication</i>	RIVER RAFTERS	SEA KAYAKERS	BACK-COUNTRY LODGES	CYCLISTS	HIKERS	DIVERS/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 out-door activities, including hiking, camping and Alpine skiing (see Chart B). **River Rafters, Sea Kayakers, Divers/Snorkellers**, and **Golfers**, on the other hand, are not as widely represented in other tourism activity sectors.

IV. Sea Kayakers Market Profile

A. Market Composition

The Sea Kayaking sector is composed of Canadian pleasure tourists who engage in sea kayaking as the *main reason* for an overnight trip in the past two years (2004 and 2005). They represent 1-in-125 of the 20.0 million Canadian overnight pleasure travellers to *any destination* and 1-in-71 of the 6 million Canadians who have come to British Columbia for a vacation during 2004 or 2005.

Table C below illustrates the percentage and total number of Canadian Sea Kayakers as well as Canadian Overnight Pleasure Travellers, to any destination and British Columbia, who indicated that their *main trip purpose* was to engage in kayaking.

TABLE C: MAIN REASON FOR TAKING OVERNIGHT TRIPS IN 2004-2005	Sea Kayakers	Total Canadian Pleasure Tourists British Columbia	Total Canadian Pleasure Tourists Any Destination
<i>Unweighted Base</i>	(187)	(7,788)	(23,156)
<i>Weighted, Projected</i>	153,231	6,002,103	19,946,295
Sea Kayakers	153,231	84,351	153,231
<i>Percentage</i>	100%	1.4%	0.8%

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

B. Regional and Demographic Characteristics

1. Place of Residence

At over to 150,000, Sea Kayakers – Canadian adults who take vacations *in order to go sea kayaking* - are a small niche market. They represent 1-in-125 of the 20.0 million Canadian overnight pleasure travellers to *any destination* (0.8%) and 1-in-71 of the 6 million Canadians who have come to British Columbia (1.4%) for a vacation in the past two years or so (2004 and 2005).

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

- Sea Kayakers live in every province, with the exception of Manitoba.
- Sea Kayakers seems to be particularly popular among pleasure tourists who reside in the larger cities in the West and Central Canada, such as **Vancouver** (14%), **Calgary** (10%) **Montreal** (8%), **Quebec City** (8%), and **Toronto** (8%).
- **Montreal** has the highest percentage of Sea Kayakers (8%) in Central Canada.
- **Quebec City** is home to about 1-in-43 adult Canadians (2%) but significantly more Sea Kayakers (1-in-13, 8%) live in the city.
- **Vancouver** has the highest percentage of Sea Kayakers (14%) in the West.
- **Calgary** is home to about 1-in-27 adult Canadians (4%) but significantly more Sea Kayakers (1-in-10, 10%) live in the city.
- In contrast, Sea Kayakers are less likely to live the Prairie Provinces and in the Maritimes.

Regional marketing efforts to attract Sea Kayakers from Central Canada may be challenging, particularly in light of increased airfares, as these tourists are concentrated in Montreal, Quebec City and Toronto. However, the closer proximity of the **Albertan market** should be exploited.

TABLE 1: PLACE OF RESIDENCE	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
Incidence of Sea Kayakers	100%	1.4%	0.8%
Maritimes			
Halifax	2.2%	0.6%	1.2%
Quebec			
Quebec City	7.7%	0.4%	2.3%
Montreal	7.9%	4.1%	11.6%
Ontario			
Ottawa	4.0%	2.0%	2.9%
Toronto	7.6%	9.1%	16.6%
Kitchener	1.3%	0.7%	1.5%
Manitoba			
Winnipeg	0%	2.4%	2.1%
Saskatchewan			
Regina	0.1%	0.9%	0.6%
Saskatoon	0.2%	1.2%	0.8%
Alberta			
Calgary	9.8%	9.0%	3.7%
Edmonton	0.6%	7.6%	3.4%
British Columbia			
Vancouver	14.2%	20.6%	7.7%
Victoria	3.5%	3.2%	1.1%

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

2. Personal and Household Characteristics

Age & Gender

While every age group is represented among Sea Kayakers, they tend to be concentrated at the **younger end** and the **middle of the age spectrum**. 1-in-3 are their **mid-twenties to mid-thirties** (30%) and close to 1-in-3 are in their **mid-forties to mid-fifties** (27%). While 1-in-5 are in their mid-thirties to mid-forties (19%), 1-in-8 are young adults (18 to 24 years, 13%), 1-in-10 are 55 years of age or older (10%) (see Table 2).

Sea Kayakers' age distribution suggests a market in which younger adults (18-34 years old - 43%) are over-represented compared to Canadian travellers as a whole (32%) and recent travellers to B.C. (31%) and older adults (55 years of age or over) are substantively under-represented. In fact, older Canadians represent only 1-in-10 Sea Kayakers (10%), whereas nearly 1-in-3 Canadian travellers as a whole (28%) and recent travellers to B.C. (29%) are in this age group.

There are more **female** (57%) than male (43%) Sea Kayakers.

Nearly **1-in-2** male and female Sea Kayakers are between **35 to 54** years of age (male 48%; female 46%).

Over **2-in-5** male and female Sea Kayakers are between the ages of **18 and 34** years (male 43%; female 44%) and 1-in-10 are aged 55 years and older (male 9%; female 11%).

TABLE 2: AGE & GENDER	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
Age			
18 – 24 Years	13.2%	12.9%	12.7%
25 – 34 Years	30.1%	18.4%	18.8%
35 – 44 Years	19.4%	18.7%	20.4%
45 – 54 Years	27.3%	21.3%	20.2%
55 – 64 Years	8.2%	14.9%	14.4%
65+ Years	1.7%	13.9%	13.5%
Gender			
Men			
18 – 34 Years	43.1%	32.8%	32.2%
35 – 54 Years	47.9%	39.5%	41.0%
55+ Years	8.9%	27.7%	26.7%
Women			
18 – 34 Years	43.6%	29.8%	30.7%
35 – 54 Years	45.9%	40.4%	40.3%
55+ Years	10.6%	29.8%	29.0%

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

Education, Occupation and Income

Sea Kayakers are more **educated** and **affluent** than Canadian pleasure visitors to British Columbia and to any destination.

Tourists in this niche market are **highly educated**, over 1-in-3 have post-secondary or higher education (diploma or degree; 33%) and 1-in-2 have a university degree (50%).

More Sea Kayakers have a **post-secondary diploma or certificate** (33%), than do Canadian travellers (to B.C. 20% or any destination 22%). One-half of Sea Kayakers have a **university degree** (50%), whereas 1-in-3 Canadian travellers (to B.C. 35% or any destination 30%) have a University degree.

Over 3-in-10 Sea Kayakers report annual household incomes **over \$100,000** (31%); this is higher than Canadian travellers as a whole (22%) and visitors to B.C. (29%) and over 1-in-4 Sea Kayakers have household incomes between \$60,000-\$99,999 (26%). Less than 1-in-5 Sea Kayakers fall in the \$40,000-\$59,999 (15%) or under \$40,000 income categories (20%).

Not surprisingly in light of the age categories that Sea Kayakers fall in, a high percentage are **employed** (65%). More Sea Kayakers are **employed** than are recent visitors to B.C. (58%) and the Canadian travelling public as a whole (48%). There are significantly fewer Sea Kayakers who are retired (5%) compared to recent visitors to B.C. (18%) or the Canadian travelling public as a whole (17%).

Sea Kayakers are also less likely to be going to school (2%) or be homemakers (2%) than are recent visitors to B.C. (school 7%; homemaker 6%) and the Canadian travelling public as a whole (school 7%; homemaker 6%).

TABLE 3: EDUCATION, OCCUPATION, INCOME	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
Education			
High school diploma or less	11.6%	32.6%	36.7%
Some post-secondary	4.6%	11.9%	10.9%
Post-secondary diploma or certificate	33.1%	19.5%	21.6%
University degree+	49.6%	35.4%	30.0%
Occupation/Work Status			
Work 30+ hrs/week as paid employee	64.8%	58.3%	47.8%
Work as paid employee but part-time (less than 30 hrs/week)	1.7%	6.1%	5.4%
Self-employed/Unpaid worker at a family business	12.1%	12.8%	9.9%
Going to school	1.9%	6.5%	7.2%
Homemaker	2.0%	6.1%	5.5%
Retired	4.6%	17.8%	17.4%
Household Income			
Under \$40,000	19.6%	17.8%	20.6%
\$40,000 - \$59,999	14.7%	13.9%	14.6%
\$60,000 - \$99,999	26.1%	27.0%	27.1%
\$100,000+	31.1%	29.3%	22.4%

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

3. Household Composition

Over 2-in-3 Sea Kayakers **live with a spouse or partner** (with or without children) (67%) and over 2-in-5 live with a spouse/partner and **no children 17 years or younger** (46%), while under 1-in-5 live with children 17 years or younger (17%) (see Table 4).

More Sea Kayakers live with a **spouse/partner and no children 17 years or younger** (46%) than do *typical* tourists to British Columbia (39%) or any destination (38%) and more live with **someone other than a spouse/child** (18%) than do *typical* tourists to British Columbia (13%) or any destination (14%).

Fewer Sea Kayakers live **alone** (7%) than do *typical* tourists to British Columbia (10%) or any destination (11%) and less Sea Kayakers live with a **spouse and children 17 years or under** (17%) than do *typical* tourists to British Columbia (24%) or any destination (22%).

TABLE 4: HOUSEHOLD CHARACTERISTICS	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
"Do you live:"			
Alone	7.4%	10.3%	10.7%
With spouse/partner & no children 17 years or younger	45.5%	38.6%	38.0%
With spouse/partner & children 17 years or under	16.6%	23.5%	22.0%
With spouse/partner & children 18 years & over but none under 17 years	4.4%	7.9%	7.8%
With children and no spouse	7.7%	5.1%	6.7%
Someone other than spouse/child	18.4%	13.4%	13.6%

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

V. Competitive Destinations

A. Worldwide Destinations for Overnight Pleasure Trips

When asked to identify the destinations of the overnight pleasure trips they took over a two-year period, virtually all Sea Kayakers indicated that they have taken recent vacations within Canada and less than 1-in-4 claim to have travelled *only* within Canada (24%); this is lower than for Canadian travellers to B.C. (28%), and Canadian pleasure travellers to any destination (36%) (see Table 5). Over 3-in-5 have been to the United States on a recent overnight pleasure trip (64%), suggesting that the U.S.A. is a particularly attractive destination for these Sea Kayakers, this is higher than Canadian tourists to B.C. (60%) and Canadian pleasure tourists as a whole that have been to any destination recently (51%).

British Columbia is more successful in attracting Sea Kayakers (55%) vis à vis the general travelling public in Canada (30%).

Quebec (63%) and **Ontario** (56%) - are the main provincial competitors for Canadian Sea Kayakers. There are significantly more Sea Kayakers who have travelled to **Quebec** (63%) and **Nova Scotia** (31%) than have Canadian pleasure visitors to B.C.

(Quebec 24%; Nova Scotia 11%) and Canadian travellers as a whole to any destination (Quebec 39%; Nova Scotia 12%).

The **United States** clearly leads the International market (64%) but other foreign competitive destinations for Sea Kayakers include the *Caribbean* (20%), *Mexico* (17%) and *Europe* (16%). Sea Kayakers are more likely than *typical* Canadian tourists to any destination, to travel to other countries and regions. They are particularly more likely to visit **South and Central America** (10%) than are Canadian pleasure visitors to B.C. (6%) or Canadian travellers as a whole to any destination (5%).

Note to Readers

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

In other words, Canadian Sea Kayakers claim to have taken an overnight trip motivated by going kayaking 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, Sea Kayakers may or may not have gone kayaking in a particular country, province or state they have visited recently for an overnight pleasure trip.

TABLE 5: COMPETITIVE DESTINATIONS WORLDWIDE*	Sea Kayakers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination
Unweighted base	Total (187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
Canada			
Newfoundland & Labrador	6.5%	3.4%	4.3%
Prince Edward Island	11.4%	6.3%	7.2%
Nova Scotia	31.0%	10.8%	11.7%
New Brunswick	20.2%	9.0%	12.6%
Quebec	62.8%	23.8%	38.5%
Ontario	56.4%	40.2%	52.8%
Manitoba	6.4%	16.0%	9.1%
Saskatchewan	10.0%	23.2%	11.2%
Alberta	32.3%	57.2%	25.4%
British Columbia	55.0%	100%	30.1%
Yukon	1.6%	3.1%	1.0%
Northwest Territories	0.1%	1.8%	0.7%
Nunavut	0.5%	0.5%	0.3%
United States	63.8%	59.8%	50.6%
Other Countries/Regions			
Mexico	16.9%	18.6%	12.0%
South/Central America	10.4%	5.6%	4.8%
Caribbean	20.1%	14.2%	15.4%
Europe (Incl. the UK and Russia)	15.9%	18.7%	15.6%
Asia	7.0%	8.7%	5.5%
Australia/New Zealand/Africa	4.3%	4.3%	2.9%
Destination patterns			
Only Canada	24.2%	28.1%	35.6%
Canada & U.S.A. only	53.1%	54.5%	61.2%
Canada & Other Countries (Not U.S.A.)	36.2%	40.2%	49.4%
Canada & Mexico only	24.8%	30.7%	37.3%
U.S.A. only	0.0%	0.0%	2.2%

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

B. Destinations: Roles & Ratings

1. Importance of Destination

For most Canadian Sea Kayakers the first consideration in planning their most recent **summer** trip was **destination** (38%) (see Table 8). At the same time, just under 1-in-5 begins with the **activities** they wish to participate in (19%) and the **type of vacation experience** they wish to have (19%). This level of **activity-driven** planning is significantly higher than is the case among typical Canadian tourists to British Columbia (10%) or in the Canadian travel market as a whole (11%). Significantly more Sea Kayakers look for a **package deal** (with out destination) (10%) than do recent visitors to British Columbia (1%) or Canadian travellers as a whole (1%).

Like summer trips, when planning a **winter** trip most Canadian Sea Kayakers first consideration was the **destination** (25%), followed by the **activities** they wish to participate in (23%). This level of **activity-driven** planning is substantially higher than is the case among typical Canadian tourists to British Columbia (12%) or in the Canadian travel market as a whole (9%). A lower proportion of these tourists start their trip planning process with a focus on the **type of vacation experience** they wish to have (9%).

Destination is very important to Sea Kayakers, with over 2-in-3 claiming that it is *extremely* or *very important* to them (71%), this is higher than Canadians with recent pleasure travel experience in British Columbia (63%) or travellers as a whole (62%). Their average rating for the importance of destination 3.0, which is higher than Canadians with recent pleasure travel experience in British Columbia (2.8) or travellers as a whole (2.8).

TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
First Consideration for Most Recent Summer Trip			
Start with destination	38.1%	43.2%	37.8%
Start with activities	18.9%	9.6%	10.6%
Start with type of vacation experience	18.5%	18.4%	18.5%
Look for package deal (with out destination)	9.5%	1.1%	1.1%
First Consideration for Most Recent Winter Trip			
Start with destination	25.2%	32.5%	28.4%
Start with activities	23.1%	11.6%	9.1%
Start with type of vacation experience	9.2%	12.8%	11.4%
Look for package deal (with out destination)	1.1%	1.4%	1.9%
Importance of Destination			
Extremely/Very Important	70.8%	63.0%	62.1%
Extremely important	35.4%	23.9%	23.1%
Very important	35.4%	39.1%	39.0%
Average*	3.0	2.8	2.8

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

2. Importance of Conditions in Destination Choice

Overnight pleasure travellers were asked to rate a variety of “conditions” in terms of their importance in making a destination choice. A three-point semantic scale was used.¹³

Sea Kayakers somewhat 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, Sea Kayakers put having *many things for adults to see and do* (48%) at the top of their list, followed by *feeling safe* (46%) (see Table 9). Close to 3-in-10 Sea Kayakers are interested in a destination that and offers *mid-range lodging* (32%) and that has *convenient access by car* (29%). While close to 1-in-4 place high importance on a destination that offers *camping* (25%), poses *no health concerns* (24%), and has *destination information on the internet* (24%). Over 1-in-5 are interested in the *availability of budget accommodation* (22%).

Summary: Considerations Deemed *Highly Important* By At Least 1-in-4 Sea Kayakers¹⁴

	<u>Sea Kayakers</u>	<u>Canadian Pleasure Tourists</u>	
		<u>To British Columbia</u>	<u>Any Destination</u>
Lots for adults to see/do	48.4%	39.2%	38.0%
Feeling safe	45.8%	65.1%	65.9%
Mid Range accommodation	31.5%	29.6%	29.6%
Convenient Access by Car	28.5%	36.2%	43.3%
Camping	24.5%	13.9%	12.8%

Sea Kayakers are more apt to take into account a destination that offers many *things for adults to see and do* (48%) than are visitors to B.C. (40%) or Canadian travellers as a whole (38%). They are also more interested in *camping* (25%) than are visitors to B.C. (14%) or Canadian travellers as a whole (13%) as well as having the opportunity to visit a *culture very different than their own* (17%), than are visitors to B.C. (9%) or Canadian travellers as a whole (9%).

Close to 3-in-10 Sea Kayakers indicated that *convenient access by car* (29%) is an important consideration, however, this is lower than for visitors to B.C. (36%) or Canadian travellers as a whole (43%). This does not bode well for British Columbia, as a large proportion of this market is from Central Canada, which is not conveniently accessible by car (to B.C.).

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

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

Sea Kayakers are adventurous travellers and as such they are **less** worried about feeling *safe* (46%) than are visitors to B.C. (65%) or Canadian travellers as a whole (66%). They are also less concerned about destinations that pose *no health concerns* (24%) than are visitors to B.C. (47%) or Canadian travellers as a whole (50%).

Sea Kayakers are not as motivated by destinations that *have lots for children to see and do* (10%) than are visitors to B.C. (14%) or Canadian travellers as a whole (16%), or ones that offer *luxury accommodation* (2%) than are visitors to B.C. (6%) or Canadian travellers as a whole (7%).

Conditions rated as not being of high importance for Sea Kayakers are: having convenient access by train/bus, being disabled-person friendly or the availability of luxury accommodation.

TABLE 9: CONDITIONS FOR SELECTING A DESTINATION

	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
<i>Bold rows are proportion stating "Highly Important" in rank order by Sea Kayakers</i>			
Lots for adults to see/do	48.4%	39.2%	38.0%
Of no importance	7.2%	7.2%	7.3%
Feeling safe	45.8%	65.1%	65.9%
Of no importance	8.6%	3.1%	3.5%
Mid-range accommodation	31.5%	29.6%	29.6%
Of no importance	19.4%	12.6%	12.8%
Convenient access by car	28.5%	36.2%	43.3%
Of no importance	26.8%	13.6%	11.5%
Camping	24.5%	13.9%	12.8%
Of no importance	27.0%	48.7%	50.6%
No health concerns	24.1%	46.8%	49.9%
Of no importance	9.1%	8.8%	8.2%
Information available on internet	23.8%	25.7%	24.6%
Of no importance	28.3%	24.7%	27.1%
Budget accommodation	22.1%	21.5%	21.7%
Of no importance	26.0%	23.4%	23.8%
Very different culture than own	17.4%	9.1%	8.9%
Of no importance	26.2%	39.6%	39.7%
Low cost packages available	15.4%	20.9%	22.8%
Of no importance	40.2%	27.3%	23.1%
Direct access by air	14.3%	31.6%	28.9%
Of no importance	23.4%	17.0%	21.7%
Have friends or relatives there	13.1%	10.2%	11.1%
Of no importance	66.2%	59.6%	59.0%
Familiar with culture & language	12.6%	10.8%	13.6%
Of no importance	39.3%	28.6%	26.9%
Great shopping	11.6%	11.1%	12.3%
Of no importance	65.3%	45.0%	43.2%
Lots for children to see/do	9.7%	13.7%	16.4%
Of no importance	73.1%	62.0%	56.5%
Convenient access by train/bus	6.0%	11.4%	13.1%
Of no importance	36.2%	40.3%	39.3%
Disabled-person-friendly	3.9%	3.6%	5.6%
Of no importance	89.3%	79.6%	73.8%
Luxury accommodation	2.0%	5.7%	6.8%
Of no importance	63.2%	57.5%	54.5%

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

3. Appeal of Various Destinations

Canadian Sea Kayakers are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel; they accord B.C. a rating of 8.9 on a ten-point scale (see Table 10).¹⁵ Though lower than B.C.'s, moderately favourable ratings are accorded a host of destinations, including **Hawaii** (8.4), **Nova Scotia** (7.7), **Quebec** (7.6), **California** (7.6), **Prince Edward Island** (7.5), **Newfoundland and Labrador** (7.1) and the **Yukon** (7.0).

Summary: Five Highest Appeal Destinations among Sea Kayakers¹⁶

	<u>Canadian Pleasure Tourists</u>		
	<u>Sea Kayakers</u>	<u>To British Columbia</u>	<u>Total</u>
British Columbia	8.9	9.0	8.8
Hawaii	8.4	8.1	8.3
Nova Scotia	7.7	7.2	8.4
Quebec	7.6	6.7	9.0
California	7.6	7.4	8.4

British Columbia is given the highest rating as an appealing destination for pleasure travel, and only 5% of Canadian Sea Kayakers 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 Sea Kayakers back to the province!

¹⁵ Two image questions associated with specific destinations were included in the TAMS study. One of these asked travellers to use a ten-point bi-polar rating scale ranging from *very appealing* (10) to *very unappealing* (1) to assess each destination's appeal for a pleasure trip. The second question associated with reasons to travel to a destination is discussed in the following chapter. Many potential tourists refrained from offering opinions about the destinations included in this question, presumably because they did not have sufficient information about the destination to form a clear image.

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

TABLE 10: APPEAL OF VARIOUS DESTINATIONS

DESTINATIONS	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
<i>Bold rows are average ratings**</i>			
British Columbia	8.9	9.0	8.8
No rating provided	5.3%	2.1%	12.4%
Newfoundland & Labrador	7.1	6.8	7.9
No rating provided	15.1%	19.5%	21.5%
Nova Scotia	7.7	7.2	8.4
No rating provided	8.5%	14.5%	16.3%
New Brunswick	6.8	6.5	8.3
No rating provided	11.1%	16.8%	16.9%
Prince Edward Island	7.5	7.2	8.3
No rating provided	6.8%	15.5%	16.6%
Quebec	7.6	6.7	9.0
No rating provided	3.4%	11.1%	10.2%
Ontario	6.8	6.6	9.2
No rating provided	4.5%	8.0%	8.0%
Manitoba	4.4	4.8	7.9
No rating provided	16.8%	14.6%	21.1%
Saskatchewan	4.4	4.8	7.9
No rating provided	12.1%	13.4%	20.7%
Alberta	6.6	7.3	8.5
No rating provided	10.0%	6.8%	15.3%
Yukon	7.0	6.4	7.5
No rating provided	15.9%	19.5%	24.9%
Northwest Territories	6.6	5.8	7.4
No rating provided	14.2%	21.1%	25.7%
Nunavut	6.0	5.0	7.2
No rating provided	16.1%	24.3%	28.1%
New York State	6.3	6.2	8.4
No rating provided	6.8%	14.1%	16.0%
Colorado	6.5	6.1	7.6
No rating provided	13.3%	19.9%	24.5%
Florida	6.2	6.5	8.7
No rating provided	8.5%	12.2%	13.5%
California	7.6	7.4	8.4
No rating provided	8.6%	10.5%	16.0%
Hawaii	8.4	8.1	8.3
No rating provided	10.0%	12.5%	17.1
Arizona	6.8	6.5	7.8
No rating provided	11.1%	15.9%	21.1%

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

4. Number of Good Reasons to Visit Various Destinations

Not too surprisingly, the *same* destinations accorded high *appeal* ratings are also the ones that emerge at the top of Sea Kayakers' lists for having *many good reasons* to visit on a pleasure trip (see Table 11).¹⁷ Specifically, **British Columbia** tops the list with over 8-in-10 Sea Kayakers stating that there are *many good reasons* to go to this destination.

British Columbia surpasses all other Canadian and U.S. destinations, as a destination that offers Sea Kayakers (82%) *many good reasons* to visit. Other destinations with many reasons to visit, according to Sea Kayakers are Hawaii (66%), Quebec (61%), California (58%), and Nova Scotia (50%).

Significantly more Sea Kayakers than Canadian pleasure tourists to B.C. and any destination, state that there are many good reasons to visit **Quebec** (61%) (visitors to B.C 35%; visitors to any destination 42%), **Colorado** (36%) (visitors to B.C 18%; visitors to any destination 19%), **Northwest Territories** (29%) (visitors to B.C 16%; visitors to any destination 12%), **Nunavut** (19%) (visitors to B.C 11%; visitors to any destination 9%) and the **Yukon** (36%) (visitors to B.C 22%; visitors to any destination 17%).

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

<u>Sea Kayakers</u>	<u>Canadian Pleasure Tourists</u>				
		<u>To British Columbia</u>	<u>Total</u>		
B.C.	82%	B.C.	83%	B.C.	65%
Hawaii	66%	Hawaii	56%	Hawaii	55%
Quebec	61%	California	50%		
California	58%				
Nova Scotia	50%				

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

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

TABLE 11: NUMBER OF REASONS TO VISIT
VARIOUS DESTINATIONS

	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
<i>% stating "MANY" good reasons to visit In Rank order by Sea Kayakers</i>			
British Columbia	81.5%	83.4%	64.6%
Hawaii	66.2%	55.5%	54.6%
Quebec	60.7%	35.3%	41.6%
California	58.1%	49.8%	47.1%
Nova Scotia	50.4%	33.5%	32.4%
Newfoundland & Labrador	42.9%	30.3%	27.4%
Ontario	39.8%	35.4%	43.3%
Prince Edward Island	39.4%	33.8%	32.0%
Alberta	39.0%	45.3%	34.9%
Colorado	36.4%	17.8%	18.7%
Florida	36.1%	35.0%	40.4%
Yukon	35.7%	22.1%	16.9%
New York State	34.7%	30.8%	30.4%
Arizona	32.8%	22.1%	22.9%
Northwest Territories	29.3%	15.5%	12.3%
New Brunswick	28.0%	21.3%	22.9%
Nunavut	19.0%	11.0%	9.1%
Saskatchewan	4.6%	10.1%	7.7%
Manitoba	3.4%	8.6%	7.5%

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

VI. Activities on Overnight Trips

A. Introduction

The 2006 TAMS questionnaire included approximately 190 activities a person may have engaged in while on a trip. In addition to capturing *incidence* of participation in this array of activities, the study asks consumers to indicate whether an activity they engaged in on *any* overnight trip in the past two years (2004 and 2005) was a *main reason for taking any of these trips*.¹⁸

Not Necessarily in Canada or British Columbia

TAMS 2006 provides two important but independent measures - where tourists went and what tourists did. Even though the tourists singled out for special scrutiny in this report claim to have taken an overnight pleasure trip motivated by **kayaking or canoeing in oceans** 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 **kayaking** 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 Sea Kayakers* 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 **Sea Kayakers** provided in this chapter are appended (see Tables A1, A2 and A3).

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

B. Trip Activities & Drivers

1. Sea Kayakers' Cross-Over with Other Trip Activity Sectors

As demonstrated by their representation in other activity-based tourism sectors, Sea Kayakers are multi-dimensional travellers.¹⁹ Over 1-in-2 are also **Hikers** (52%) and around 1-in-3 are **Campers/RVers** (34%), **Alpine Skiers** (32%) and/or travellers on **self-guided overnight tours** (32%), whilst 1-in-4 are **Nordic Skiers** (26%) and/or **cyclists or mountain bikers** (24%) (see Table 12).

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

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

- Sea Kayakers are eight times as likely to be Nordic Skiers.
- They are over six times as likely to be Hikers, Cyclists/mountain bikers and/or Divers.
- They are five times as likely to be River Rafters.
- They are three times as likely to be Alpine Skiers.
- Sea Kayakers are twice as likely to be Backcountry Lodge Guests and Campers/RVers than are the Canadian travelling public as a whole.

¹⁹ Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Sea Kayakers provided in this chapter are appended (see Table A1).

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

	Sea Kayakers	All Canadian Pleasure Tourists		
	Total	To British Columbia	Any Destination*	Index to All Canadian Tourists** Sea Kayakers
Unweighted base	(187)	(7,788)	(23,156)	
Weighted, Projected	153,231	6,002,103	19,946,295	
<i>In Rank order by Sea Kayakers</i>				
Sea Kayakers	100%	1.4%	0.8%	n/a
Hikers	51.8%	9.4%	7.6%	682
Campers/RVers	33.5%	17.7%	16.1%	208
Alpine Skiers	32.3%	14.9%	9.7%	333
Self-Guided Overnight Touring Travellers	31.7%	22.4%	17.7%	179
Nordic Skiers	25.6%	3.8%	3.2%	800
Cycling/Mountain Biking	24.2%	4.8%	3.8%	637
History and Heritage Tourists	19.7%	12.2%	12.1%	163
Anglers	16.8%	10.9%	11.4%	147
Divers & Snorkellers	14.1%	3.4%	2.3%	613
Golfers	7.8%	7.2%	5.6%	139
Backcountry Lodge Guests	6.3%	2.6%	2.9%	217
River Rafters	5.5%	1.6%	1.1%	500
Aboriginal Activity Tourists	4.0%	3.7%	2.8%	143
Snowmobilers	1.8%	1.9%	2.5%	72

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

2. Major Trip Activity Groups

By definition, all Sea Kayakers are motivated to take overnight pleasure trips in order to go *kayaking or canoeing on oceans*. Consequently, they are all members of the more broadly defined **outdoor water-based activity** market. Like most tourists however, Sea Kayakers take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.²⁰

- In addition to taking trips to go kayaking, 4-in-5 of these Canadians take trips motivated by engaging in at least one **land-based activity** (80%).
- 1-in-2 Sea Kayakers participated in at least one **outdoor winter activity** (50%) and stayed in an **accommodation** during a recent overnight pleasure trip (49%).
- Over 1-in-4 Sea Kayakers are motivated by visiting **Exhibits/Historic Sites/Museums** (28%) and viewing **Performing Arts** (26%).
- 1-in-5 Sea Kayakers are motivated by **shopping and dining experiences** (22%) and by attending **Festivals and Events** (22%).

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, more Sea Kayakers *participated* in at least one performing arts experience while on a recent overnight pleasure trip (58%) than claim to have taken a trip motivated by one of these activities (26%).

Shopping and dining experiences are especially likely to be “one-of-many” trip activities (95%) but the driving force behind a trip for relatively few segment members (22%). Similarly, around 8-in-10 went on a recent trip to visit exhibits, historic sites and museums but only 2-in-10 took the trip in order to do so.

Compared to *all* Canadian overnight pleasure travellers, Sea Kayakers are three times as likely to identify water-based activities, winter outdoor activities, air-based activities, and land-based activities as ones that *motivated* recent trips (main reason).

They are twice as likely as *all* Canadian overnight pleasure travellers are, to identify hand-on learning activities and team sports/tournaments/games as ones that *motivated* recent trips (main reason).

²⁰ Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Sea Kayakers provided in this chapter are appended (see Table A1).

Summary: Activities that are three times as likely to have motivated (main reason) a recent overnight trip for Sea Kayakers, compared to all Canadian Pleasure travellers.

<u>Major Activity Group</u>	<u>Main Reason</u>		<u>Any Participation</u>	
	Sea Kayakers	All Canadian Pleasure Tourists	Sea Kayakers	All Canadian Pleasure Tourists
Outdoor Water based Activities	100%	33%	100%	65%
Outdoor Winter Activities	50%	17%	69%	30%
Air-Based Activities	1%	0.3%	6%	1%
Land Based	80%	29%	96%	67%

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	Sea Kayakers	
	Main Reason	Any Participation
Unweighted base	(187)	(187)
Weighted, Projected	153,231	153,231
<i>In Rank order - Main Reason</i>		
Outdoor Water Based Activities	100%	100%
Kayaking/Canoeing - Ocean	100%	100%
Outdoor Land Based Activities	80.1%	96.3%
Outdoor Winter Activities	50.1%	68.6%
Accommodation Stayed at	49.0%	90.3%
Exhibits/Historic Sites/Museums	27.7%	79.8%
Performing Arts	25.9%	58.2%
Shopping/Dining/Food Related	21.9%	94.7%
Festivals & Events	21.5%	54.3%
Team Sports/Tournaments/Games	18.3%	32.2%
Theme/Amusement Parks/Movies	17.1%	59.1%
Spectator Sports	10.9%	36.2%
Hands-on Learning Activities	8.7%	26.3%
Aboriginal Experiences	4.0%	19.8%
Air Based Activities	0.9%	5.8%

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

3. Individual Trip Activities: The Outdoors

Many outdoor experiences are popular among Sea Kayakers (see Table 14).²¹ As their predisposition to kayak and go to sun/sea destinations might suggest, they are especially interested in *water based travel experiences*:

Water based Activities:

- 2-in-5 Sea Kayakers also enjoy kayaking or canoeing in fresh water (45%).
- 3-in-10 enjoy sunbathing or sitting on a beach (30%).
- Nearly 1-in-5 Sea Kayakers enjoy swimming in lakes (17%) and oceans (17%) and viewing whales or marine wildlife (15%).

Land Based Activities:

- 2-in-5 Sea Kayakers enjoy hiking as a same day excursion (43%), while 1-in-3 enjoy hiking or backing overnight (33%).
- Close to 3-in-10 are motivated by Alpine skiing (29%).
- 1-in-4 Sea Kayakers take trips to visit a national, provincial or state nature parks (25%) either to visit the parks or to camp in them (26%).
- Cycling as a same day excursion (19%) motivates around 1-in-5 Sea Kayakers to take an overnight pleasure trip.

Comparison to Canadian Pleasure Travellers

Compared to the typical Canadian overnight pleasure traveller, a Sea Kayaker is more likely to identify passive outdoor activities such as sunbathing on a beach, and *active* ones such as swimming, as ones that motivated recent trips (main reason) and as activities that they engaged in on these trips (any participation). Their higher level of engagement with the outdoors on trips vis à vis the typical Canadian tourist is further evidence that Sea Kayakers represent a distinctive market.

These Sea Kayakers participate in both summer and winter outdoor activities, in fact they are 125 times more likely than Canadian pleasure travellers to go ocean kayaking/canoeing. They are 29 times more likely to go dog sledding, 22 times more likely to go windsurfing, 16 times as likely to go rock climbing, 13 times as likely to go snowshoeing or cycling as an overnight touring trip, 12 times as likely to go mountain climbing/trekking and freshwater kayaking/canoeing, nine times as likely to go cross country skiing overnight, snorkelling in lakes/rivers or scuba diving in sea/ocean and

²¹ Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Sea Kayakers provided in this chapter are appended (see Table A2).

eight times more likely to go hiking as a same day excursion, than are Canadian pleasure travellers.

Summary of Outdoor activities where Sea Kayakers are more than *eight times* as likely than Canadian Pleasure Travellers to be *motivated by* (main reason) for a recent overnight trip.²² (In rank order from highest – Dog sledding 29 times - to lowest, Hiking – same day excursion 8 times more likely than Canadian Pleasure Travellers).

	<u>Main Reason</u>		<u>Any Participation</u>	
	Sea Kayakers	All Canadian Pleasure Tourists	Sea Kayakers	All Canadian Pleasure Tourists
Dog Sledding	8.6%	0.3%	10.6%	0.9%
Windsurfing	2.2%	0.1%	9.6%	1.1%
Climbing - Rock Climbing	6.4%	0.4%	8.2%	1.6%
Snowshoeing	14.4%	1.1%	26.3%	4.2%
Cycling - Overnight Tour Trip	12.8%	1.0%	13.8%	1.4%
Climbing - Mountain/Trekking	14.8%	1.2%	19.5%	3.2%
Kayaking/Canoeing - Freshwater	45.4%	3.8%	51.4%	11.6%
Skiing -Cross Country Overnight	6.6%	0.7%	8.7%	1.1%
Snorkelling in Lakes/rivers	2.7%	0.3%	8.6%	2.4%
Scuba Diving In Sea /Ocean	6.1%	0.7%	13.0%	2.8%
Hiking - Same Day Excursion	42.8%	5.3%	73.5%	23.8%

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

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

TABLE 14: INDIVIDUAL OUTDOOR ACTIVITIES –
MAIN & ANY*

	Sea Kayakers	
	Main Reason	Any Participation
Unweighted base	(187)	(187)
Weighted, Projected	153,231	153,231
<i>In Rank order - Main Reason</i>		
Kayaking/Canoeing - Ocean	100%	100%
Kayaking/Canoeing - Freshwater	45.4%	51.4%
Hiking - Same Day Excursion	42.8%	73.5%
Hiking/Backpack Overnight	33.1%	39.3%
Sunbathing or sitting on a beach	30.4%	51.1%
Skiing - Downhill	28.8%	33.4%
Camping - Public campground	26.1%	59.7%
Nature Park- National/Provincial	24.6%	52.8%
Cycling - Same Day Excursion	19.3%	37.4%
Swimming in lakes	17.0%	59.6%
Swimming in oceans	16.7%	50.2%
Wildlife - Whale/Marine	14.6%	36.2%
Well Known Natural Wonders	11.9%	41.1%
Private Campground	7.4%	33.6%
Fitness - Jog/Exercise Outdoors	6.3%	30.1%

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

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

By and large, Sea Kayakers 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 trips²³ (see Table 15).

Culture

Sea Kayakers are much 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, over half have strolled around a city to observe its buildings and architecture on a recent pleasure trip but only about 1-in-7 have taken a trip in order to do so (Main, 14%; Any, 52%). Similar patterns are evident for seeing well-known historic sites and going to general history museums. These tourists are about five times as likely to go to historic sites and eight times as likely to go to general history museums, and as one of their trip activities as they are to make these attractions the driving force behind the trip.

Entertainment

Entertainment-oriented activities are not as likely to have motivated Sea Kayakers to take trips, as are cultural activities. These kayakers are drawn by **rock & roll or popular concerts** (Main, 13%; Any, 30%), and by taking in a **movie** (Main, 3%; Any, 41%). 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 Sea Kayakers.

Dining

Similar to many entertainment-oriented activities, dining out at **restaurants offering local ingredients and cuisine** (Main, 8%; Any, 74%), visiting **local outdoor cafes** (Main, 4%; Any, 72%) and dining in **high-end restaurants (not with an international reputation)** (Main, 3%; Any, 34%), are much more common trip experiences (any) than trip drivers (main) for Sea Kayakers.

Shopping

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

Sports

Fewer than 1-in-5 Sea Kayakers are motivated by sporting events.

²³ Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Sea Kayakers provided in this chapter are appended (see Table A3).

Comparison to Canadian Pleasure Travellers

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

Summary of other activities where Sea Kayakers are *four times* more likely than Canadian Pleasure Travellers to be *motivated* by (main reason) for a recent overnight trip.²⁴ (In rank order from highest – Basketball at 15 times - to lowest, Hot Air Ballooning at 4 times more likely than Canadian Pleasure Travellers).

	<u>Main Reason</u>		<u>Any Participation</u>	
	Sea Kayakers	All Canadian Pleasure Tourists	Sea Kayakers	All Canadian Pleasure Tourists
<u>Other Activities</u>				
Basketball	8.8%	0.6%	10.1%	1.6%
Wilderness Skills Courses	3.7%	0.6%	7.1%	1.4%
Inn/Resort Gourmet Restaurant	10.6%	1.7%	15.7%	5.0%
Paintball	1.4%	0.3%	1.4%	0.8%
Badminton	0.9%	0.2%	4.7%	1.9%
International Film festival	1.7%	0.4%	8.0%	1.8%
Soccer	3.7%	0.9%	4.6%	2.5%
Football	1.6%	0.4%	2.3%	1.1%
Hot Air Ballooning	0.4%	0.1%	1.4%	0.4%

Sea Kayakers are more likely to engage in outdoor activities or take trips for these activities. They are about 15 times as likely to be motivated to play basketball, six times as likely to attend wilderness skills courses and eat at gourmet restaurants (at an Inn/Resort), five times as likely to play paintball and badminton, and more than four times as likely to attend international film festivals, play soccer or football and go hot air ballooning, than are *typical* Canadian pleasure travellers (as a main trip motivator).

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

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

TABLE 15: OTHER INDIVIDUAL ACTIVITIES – MAIN & ANY*

	Sea Kayakers	
	Main Reason	Any Participation
Unweighted base	(187)	(187)
Weighted, Projected	153,231	153,231
<i>In rank order by main reason within each subgroup</i>		
Cultural & Heritage		
Any Performing Arts	25.9%	58.2%
Festival & Events	21.5%	54.3%
Strolling around a city to see architecture	14.0%	52.2%
Historic Site/Buildings	9.3%	49.5%
Other Historic Sites/Buildings	5.6%	35.9%
Museum - History/Heritage	4.3%	34.1%
Live Theatre	4.2%	29.5%
Photography	1.3%	35.0%
Sports		
Team Sports/Tournaments/Games	18.3%	32.2%
Spectator Sports (Any)	10.9%	36.2%
Entertainment		
Rock & Roll/Popular Concert	12.8%	29.6%
Movies/cinema	3.1%	41.4%
Shopping		
Clothing, shoes, jewellery	10.6%	54.7%
Bookstores or music stores	4.3%	62.6%
Retail Gourmet Foods	3.1%	30.8%
Local arts & crafts studios	1.5%	52.5%
Food & Dining		
Dining – restaurants offering local ingredients and recipes	7.5%	74.0%
Local outdoor cafes	3.9%	72.1%
Dining - other high-end (not with international reputation)	2.9%	34.3%

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

5. Overnight Cruises & Organized Group Tours

Most Sea Kayakers are not recent overnight cruise passengers (see Table 16). Of the 1-in-13 Sea Kayakers who have taken an overnight ocean cruise in the past two years or so (2004 and 2005), destinations in the Caribbean and other locations are more popular than Alaska.

Of those who participate in **overnight group tours**, Sea Kayakers who have gone on an overnight-organized tour display a preference for tours to *multiple* (16%) versus *single* destinations (9%). They are also more likely to participate in multiple destination tours (16%) than are recent Canadian travellers to B.C. (12%) or any other destination (10%).

More Sea Kayakers claim to have taken **self-directed** same day touring trips over a two-year period (37%) than self-directed day tours that are not organized (32%).

Favoured themes for organized day excursions include wilderness or outdoor tours around the countryside, city tours, and sightseeing cruises.

Significantly more Sea Kayakers take **wilderness or outdoor tours** (34%) than are recent Canadian travellers to B.C. (16%) or any other destination (13%). They are also more likely to take **airplane/helicopter tours** (8%) than are recent Canadian travellers to B.C. (3%) or any other destination (2%).

TABLE 16: CRUISES/GROUP TOURS	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
Took any overnight cruise in past 2 years			
Type of Cruise/Destination			
Ocean (Net)	7.8%	12.6%	8.8%
Ocean – Caribbean	5.6%	5.9%	5.3%
Ocean – Other	2.1%	5.1%	3.2%
Ocean – Alaska	0.4%	4.0%	1.7%
Lake or River cruise (Net)	7.0%	3.0%	4.4%
St. Lawrence River	5.4%	0.7%	1.9%
Other lake/River	4.5%	2.2%	2.3%
Great Lakes	0%	0.4%	0.8%
Touring			
Overnight group tour – multiple locations	15.5%	12.2%	10.2%
Overnight group tour – Single Location	8.6%	8.2%	7.9%
Organized group tour – same day	29.0%	28.3%	21.9%
Self-Directed tour – same day	37.3%	34.8%	28.6%
Self-Directed tour – not organized	31.7%	22.4%	17.7%
Unspecified same day tours	1.8%	1.9%	2.9%
Type of Organized Day Tour			
<i>(In rank order by Sea Kayakers)</i>			
Wilderness/outdoor	33.7%	15.6%	12.7%
Countryside	33.3%	26.4%	22.0%
City	27.1%	28.4%	22.9%
Sightseeing cruise (day excursion)	20.7%	15.9%	12.8%
Wineries	13.3%	8.7%	5.6%
Airplane/helicopter (pilot or passenger)	7.8%	3.0%	1.9%
Casino	6.8%	6.6%	6.5%
Factory	5.5%	4.2%	2.6%

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

VII. Trip Planning

A. Who Does the Planning?

The majority of Sea Kayakers claim to have *personal involvement* in trip planning for **all** trips (80%) planned over the past two years (2004 and 2005).

In most households, the main responsibility for travel planning falls with the Sea Kayaker (48%) or is shared with other household member/s (38%).

TABLE 17: TRAVEL PLANNING	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
Frequency of personal involvement in trip planning, past 2 years			
All	80.2%	65.9%	61.8%
Most	14.6%	16.7%	15.1%
Some	4.9%	9.6%	10.3%
None/not stated	0.2%	7.8%	12.8%
Main responsibility for trip planning			
Respondent	47.8%	37.8%	34.9%
Shared with other household member	37.9%	28.7%	27.6%
Spouse/partner	7.4%	15.0%	13.5%
Other/not stated/not involved in travel planning	6.8%	13.0%	14.8%

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

B. Travel Information Sources & Travel Media

Of the many sources of travel information available to Sea Kayakers the **internet** (77%) tops the chart (see Table 18). Over 6-in-10 of these tourists rely on their own **past experience** (64%) and 5-in-10 rely on anecdotal information provided by **friends and relatives** (55%) for their travel information. Close to 1-in-2 rely on **maps** (49%), while around 2-in-5 **rely** on official **DMO travel guides** (43%), **travel agents** (43%) and **articles in a newspaper/magazine** (41%). Over 1-in-3 rely on **Visitor Information Centres** (35%), while 3-in-10 rely on **travel guidebooks** (30%). In the main, these are the same sources of information that may be influencing Canadian pleasure travellers who have recently done so, to take trips to British Columbia.

Although not a commonly used source of information, consumer travel shows or sportsmen's shows are more widely used by Sea Kayakers (11%) than by Canadian overnight pleasure travellers as a whole (3%) or those who have recently travelled to British Columbia (3%).

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

(In rank order in each column)

<u>Sea Kayakers</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
Maps	Maps	Travel Agent
Official DMO Guides	Travel agent	
Travel agent		
Articles in Newspaper/Magazines		
Visitor Information Centres		
Travel Guide Books		

With over 1-in-2 Sea Kayakers saying that they *normally* visit **travel websites** (56%), the internet has great potential for businesses in British Columbia that wish to attract sea kayakers/canoists. Sea Kayakers are more apt to watch **televised travel shows** (41%) than to read the **travel section** in their daily newspaper (26%).

General **travel magazines** such as *Condé Nast* are less popular (20%) than are **outdoor activities/sports magazines** such as *Backpacker* or *Outdoor Life* among Sea Kayakers (41%) but readership for both is higher amongst Sea Kayakers than it is for recent visitors to B.C. or the Canadian travelling public as a whole. **Outdoor activities/sports** and **General Interest and** are the most popular magazines amongst Sea Kayakers (41% and 37% respectively).

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

TABLE 18: INFORMATION SOURCES FOR TRAVEL PLANNING & GENERAL MEDIA HABITS	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected <i>In rank order by Sea Kayakers</i>	153,231	6,002,103	19,946,295
<u>SOURCES OF TRAVEL PLANNING INFO</u>			
Internet website	76.8%	67.2%	57.2%
Past experience	64.3%	52.1%	43.9%
Advice of friends/relatives	55.0%	52.4%	44.9%
Maps	48.5%	39.0%	28.6%
Official DMO travel guides	43.0%	27.2%	22.7%
Travel agent	42.6%	36.0%	30.4%
Articles in Newspaper/Magazine	41.1%	21.3%	18.4%
Visitor information centres	35.1%	24.7%	20.5%
Travel guide books	29.9%	18.1%	11.8%
Advertisements in Newspaper/Magazine	18.3%	12.8%	12.5%
Travel information in mail	15.6%	7.6%	7.8%
Auto club	15.4%	19.9%	15.6%
Television Programs	11.1%	9.0%	6.6%
Trade, travel, sportsmen's shows	10.5%	3.2%	2.7%
Electronic newsletters via e-mail	6.9%	4.6%	3.7%
Television Advertisements	4.4%	4.0%	4.5%
<u>TRAVEL MEDIA</u>			
Frequently read Travel Section daily newspaper	26.4%	21.1%	17.9%
Frequently read weekend edition of newspaper	37.0%	24.8%	21.9%
<u>Magazines read in typical month</u> <i>(In rank order by Sea Kayakers)</i>			
Outdoor activities/sports	41.1%	15.4%	12.6%
General Interest	36.8%	33.0%	30.7%
Food & Cooking	30.2%	26.2%	26.5%
Home & Garden	28.9%	23.8%	24.5%
News magazine	26.9%	25.8%	23.6%
Science and geography	26.3%	20.6%	16.3%
Fashion & Beauty	23.6%	21.6%	23.3%
Health, fitness and well living	21.5%	24.7%	21.7%
Entertainment/Music	20.8%	31.1%	32.0%
Travel	19.8%	11.3%	11.5%
Normally watch Travel Shows on TV	40.7%	33.1%	30.3%
Normally visit Travel websites	56.1%	46.3%	39.0%

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

C. Internet Use for Travel Inquiries & Bookings

As noted in the previous section, over 3-in-4 Sea Kayakers who have taken a recent pleasure trip to British Columbia rely on the internet for travel planning (77%).

Hotel/resort sites (51%), **destination marketing organization** sites (46%), **airline** sites (44%), **travel** sites such as *Expedia* or *Travelocity* (42%), and **attractions** sites (33%) are the most commonly used websites among these Canadian tourists who rely on the internet for travel planning (see Table 19).

Over 3-in-4 Sea Kayakers rely on the internet (77%) for Travel planning, this is significantly higher than the Canadian travelling public as a whole (57%), or those who have recently travelled to British Columbia (67%).

Not surprisingly, **booking** on-line is less common than is searching for information on the internet. Nonetheless, just over 1-in-2 Sea Kayakers claim to have made a travel-related booking on-line over the past two years or so (56%). As their website preferences would suggest, the most common on-line bookings for Sea Kayakers is for **accommodation** (45%), followed by **air tickets** (44%) and to a lesser degree, car rentals (22%) and tickets for attractions (14%).

Use of the internet for travel planning and for booking travel arrangements is noticeably more widespread among Sea Kayakers than the Canadian travelling public as a whole, or those who have recently travelled to British Columbia.

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
Used Internet website for vacation information, past 2 years	76.8%	67.2%	57.2%
Internet website(s) used			
<i>(Among Users, in rank order by Sea Kayakers)</i>			
Hotel/resort	51.2%	40.2%	31.9%
Destination marketing organization	45.8%	34.4%	27.7%
Airline	44.3%	39.2%	25.8%
Travel planning/booking	41.6%	34.4%	25.6%
Attraction	32.7%	23.7%	19.1%
Cruise	8.9%	6.2%	4.5%
Motorcoach	1.0%	1.6%	1.4%
Other	27.4%	17.4%	15.4%
Any Internet Bookings in Past 2 Years	55.5%	49.2%	36.6%
<i>(Among All Overnight Pleasure Travellers)</i>			
Items Purchased On-Line			
<i>(Among Users, in rank order by Sea Kayakers)</i>			
Accommodation	45.2%	33.8%	25.2%
Air tickets	44.2%	39.2%	25.1%
Car rental	21.6%	16.5%	9.8%
Tickets for activities/attractions	13.5%	11.9%	8.5%
Rail, bus, boat tickets	9.6%	8.7%	5.6%
Package deal (2+ items)	7.8%	7.7%	5.6%

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

VIII. Other Travel-Related Information

A. Use of Package Deals

Purchase of package deals in the past two years (2004 and 2005) is relatively uncommon among Sea Kayakers (see Table 20). 1-in-63 say they relied on a package deal for *all* or *most* of their trips (2%) over the past two years or so and over 2-in-5 have used package deals for *one* or *some* of these trips (42%).

Sea Kayakers who purchase packages want them to include **accommodation** (89%), **transportation to the destination** (70%), **transportation at the destination** (53%) and **food and beverages** (49%). Somewhat fewer would like the package to include tickets for activities and attractions (41%).

TABLE 20: PACKAGE DEALS	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
Frequency of Purchasing Packages in Past 2 Years			
Most/all trips	1.6%	5.9%	7.1%
One/some trips	41.9%	27.0%	23.9%
No trips/not stated/not sure	56.5%	67.1%	68.9%
Desired Components of Packages (Among Purchasers of Packages)			
<i>In rank order by Sea Kayakers</i>	(100%)	(100%)	(100%)
Accommodation	88.8%	84.4%	81.4%
Transport to destination	70.3%	80.2%	72.2%
Transport at destination	53.2%	51.9%	49.8%
Food and beverage	48.8%	48.5%	52.2%
Tickets for activities/attractions	41.0%	43.1%	45.2%
Other	10.9%	11.9%	11.7%

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

B. Benefits Sought From Pleasure Travel

At the top of the list of benefits for taking pleasure or vacation trips for over 7-in-10 Sea Kayakers is a **break from the day-to-day environment** (78%) and the ability to **relieve stress** (73%) (see Table 21).²⁵

Around 6-in-10 Sea Kayakers are interested in **seeing and doing something new or different** (67%) or be the basis of lasting **memories** (59%), while 5-in-10 are interested in **enriching their perspectives on life** (56%), **abandoning a fixed schedule** (56%) or **enriching familial relationships** (47%), while on vacation. By and large, these are the same benefits of vacations deemed to be highly important by recent Canadian tourists to British Columbia and Canadian overnight pleasure travellers in general.

Summary: 5 Top Highly Important Benefits in Rank Order among Sea Kayakers and Recent Pleasure Tourists to British Columbia and Any Destination²⁶

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

While not as widely endorsed as those cited above over 4-in-10 Sea Kayakers would like vacations to be **physically challenging**²⁷ (43%). This level of physically challenging activity (43%) is substantially higher among Sea Kayakers, than among recent travellers to British Columbia (18%) or to any destination (16%).

Benefits with low appeal to Sea Kayakers include renewing connections with people (other than family), experiencing solitude and isolation, having stories to tell once the trip is over and being pampered.

²⁵ Consumers were asked to indicate the importance they attach to a variety of possible *benefits* from pleasure travel using a three-point semantic scale ranging from *of no importance* to *highly important*. The figures presented in this section are the proportion of tourists who claim a benefit is *highly important*.

²⁶ For full array, see Table 21.

²⁷ To be challenged physically/feel physically energized.

TABLE 21: BENEFITS SOUGHT FROM PLEASURE TRAVEL

	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
<i>% Stating "Highly Important"</i>			
<i>In rank order by Sea Kayakers</i>			
Break from day-to-day environment	77.9%	66.5%	66.8%
Relax/relieve stress	72.8%	65.0%	65.4%
See/do something new/different	66.5%	49.3%	44.0%
Create lasting memories	59.0%	55.6%	52.3%
Enrich perspectives on life	55.8%	31.9%	27.7%
No fixed schedule	55.6%	42.8%	47.8%
Enrich relationship with partner/children	46.7%	54.5%	52.8%
Physical challenge	42.8%	18.1%	15.7%
Knowledge of history, cultures, places	36.0%	27.7%	24.3%
Keep family ties alive	28.1%	43.6%	43.5%
Stimulate mind/intellectual challenge	25.1%	19.3%	17.4%
Renew personal connections (non-family)	20.0%	20.3%	18.9%
Solitude and isolation	17.2%	8.9%	9.3%
Stories to share	10.8%	12.4%	12.9%
To be pampered	10.0%	9.9%	13.3%

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

C. Incidence of Summer/Winter Trips

Almost all Sea Kayakers say that they have taken an overnight pleasure trip during the **summer months** (97%); this is higher than the Canadian travelling public as a whole (86%), and those with recent travel to British Columbia (90%) (see Table 22).

Slightly fewer Sea Kayakers take **winter trips** (69%) than do those with recent travel to British Columbia (70%), however, more Sea Kayakers take winter trips than do the Canadian travelling public as a whole (64%).

	Sea Kayakers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
Unweighted base	Total (187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
Took Overnight Pleasure Trip in Past 2 Years			
In . . .			
Summer	97.1%	89.7%	86.4%
Winter	69.1%	70.4%	64.0%

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

D. Memberships in Various Organizations

Membership in a **Sports Club** (43%) and **frequent flyer program** (42%) is characteristic of over 4-in-10 Sea Kayakers, while over 3-in-10 claim to have an **Auto club membership** (36%) (see Table 23).

Compared to the Canadian travelling public as a whole and recent visitors to British Columbia, Sea Kayakers memberships are higher for all listed organizations, with the exception of Auto Clubs (which is lower for Sea Kayakers (36%) than the Canadian travelling public as a whole (38%) and recent visitors to British Columbia (47%)) and hobby clubs (which are lower for Sea Kayakers (5%) than recent visitors to British Columbia (5.4%)).

Membership in a **Nature or environmental club** is significantly higher for Sea Kayakers (16%) than the Canadian travelling public as a whole (4%) and recent visitors to British Columbia (5%).

TABLE 23: MEMBERSHIPS	Sea Kayakers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
<i>In rank order by Sea Kayakers</i>			
Sports club	43.3%	28.9%	23.5%
Frequent flyer program	41.2%	38.3%	25.7%
Auto club	36.1%	46.5%	38.3%
Nature/environmental club	16.4%	4.6%	3.5%
Hotel/car rental loyalty program	13.5%	14.0%	8.8%
Community service club	11.9%	11.2%	10.7%
Book/reading club	5.8%	5.4%	4.9%
Hobby club	5.0%	5.4%	4.6%
Travel club	0.5%	2.9%	2.1%

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

E. Shelter Used Most Often on Camping Trips

Over 4-in-5 Canadian Sea Kayakers have taken a camping trip in the past two years (88%), this is significantly higher than among recent travellers to British Columbia (46%) or Canadians to any destination (40%) (see Table 24).

Of these Sea Kayakers that camp, they use a *tent* most often for shelter on recent camping trips (79%) to a much greater extent than they rely on a *motor home or RV* for shelter (2%).

Use of a Tent (79%) among Sea Kayakers who go camping, is significantly higher than is the case among typical Canadian tourists (25%) who have been camping and those who have recently travelled to British Columbia (28%).

	Sea Kayakers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
Took Camping Trip in Past Two Years (2004 and 2005).	87.5%	46.2%	40.0%
<i>In rank order by Sea Kayakers</i>			
Tent	78.5%	28.2%	25.4%
Truck camper or van	3.5%	3.3%	2.0%
Travel trailer/fifth wheel	3.0%	7.1%	6.0%
Motor home or RV	2.2%	5.0%	3.4%
Tent trailer	0.3%	2.7%	3.2%

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

F. Lodging

Use of lodging among Sea Kayakers (90%) is higher than is the case among typical Canadian tourists (64%) and those who have recently travelled to British Columbia (73%) (see Table 25).

Campgrounds are a popular form of accommodation for Sea Kayakers while on vacation. Close to 3-in-5 Sea Kayakers have stayed at a public campground (60%), while 2-in-5 have stayed in a wilderness setting (41%) and 1-in-3 have camped in a private campground (34%). Staying in a **wilderness setting** is significantly higher among Sea Kayakers (40%), than among recent travellers to British Columbia (12%) or Canadians to any destination (8%).

More Sea Kayakers stay at a **lakeside/riverside resort** (37%) than at a ski resort or mountain resort (30%) or at a seaside resort (29%). More Sea Kayakers stay at a lakeside/riverside resort (37%) than do recent travellers to British Columbia (27%) or Canadians to any destination (22%).

More Sea Kayakers stay at a wilderness lodge (accessible by car) (15%), than do recent travellers to British Columbia (6%) or Canadians to any destination (6%). 1-in-6 Sea Kayakers have stayed at a wilderness lodge (accessible by car) (15%), while 1-in-29 have stayed at a remote/fly-in wilderness lodge (3%) and 1-in-100 have stayed at a remote/fly-in wilderness outpost (1%).

TABLE 25: LODGING USED WHILE ON AN OVERNIGHT PLEASURE TRIP IN PAST TWO YEARS (2004 and 2005)	Sea Kayakers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
	Total		
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
<i>In rank order by any participation within each subgroup (Sea Kayakers)</i>			
Used Any Lodging	90.3%	73.4%	63.8%
Camping			
Public campground in national/provincial/state park	59.7%	32.8%	25.8%
Campsite in wilderness setting	40.2%	12.1%	8.4%
Private Campground	33.6%	22.9%	18.4%
Resort/Spa			
Lakeside/riverside resort	36.8%	26.6%	22.1%
Ski resort or mountain resort	30.1%	23.8%	13.6%
Seaside Resort	28.9%	26.5%	20.3%
Health Spa	11.8%	6.9%	5.8%
Backcountry Lodge/Outpost			
Wilderness Lodge By Car	15.1%	5.6%	5.5%
Remote/Fly-In Wilderness Lodge	3.4%	2.7%	1.6%
Remote/Fly-In Wilderness Outpost	1.0%	1.0%	0.6%
Motorhome/RV while touring (not camping)	4.1%	7.0%	4.5%
Farm or guest ranch	2.2%	4.5%	2.9%
Houseboat	1.8%	2.5%	1.4%

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

G. Recreation Ownership

More Sea Kayakers have regular access to **cottages and/or cabins** (45%) than do recent visitors to British Columbia (32%) and the Canadian travelling public as a whole (33%). Sea Kayaker's access to cottages and/or cabins in their home province (34%) is also higher than recent visitors to British Columbia (25%) and the Canadian travelling public as a whole (28%).

Close to 5-in-10 Sea Kayakers own canoes or kayaks (48%); ownership of this type of equipment is appreciably higher among Sea Kayakers than it is among recent visitors to British Columbia (17%) and the Canadian travelling public as a whole (15%).

Ownership of motor homes/RVs, motor boats, an ATV, snowmobile or sailboat is less common.

TABLE 25: RECREATION OWNERSHIP	Sea Kayakers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
	Total		
Unweighted base	(187)	(7,788)	(23,156)
Weighted, Projected	153,231	6,002,103	19,946,295
<i>In rank order by Sea Kayakers</i>			
Cottage/Cabin			
Cottage/cabin regular access	45.2%	32.1%	32.8%
Cottage/cabin in home province	33.8%	25.0%	27.9%
Cottage/cabin other province	13.9%	8.1%	4.8%
Cottage/cabin outside Canada	2.4%	3.4%	3.1%
Canoe/kayak	48.4%	17.3%	15.4%
Motor home, camper, RV	18.4%	19.8%	15.3%
Motor boat	12.5%	17.2%	17.0%
Snowmobile	7.0%	7.3%	10.0%
All-terrain vehicle (ATV)	6.7%	11.3%	12.9%
Sailboat	3.0%	4.4%	3.1%

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

IX. Appendices

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

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

Alberta Tourism, Parks, Recreation and Culture ²⁸	Parks Canada
Atlantic Canada Tourism Partnership	Ontario Tourism Marketing Partnership
Canadian Tourism Commission	Quebec Ministry of Tourism
Department of Canadian Heritage	Statistics Canada
Government of Northwest Territories	Tourism British Columbia
Government of Yukon	Tourism Manitoba
Ontario Ministry of Tourism	Tourism Saskatchewan

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

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

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

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

²⁸ Formerly *Alberta Economic Development*.

B. Trip Activity Sector Definitions

The following activities as the *main reason* for at least one overnight trip in the past two years (2004 and 2005) are used to define each of the Trip Activity Sectors mentioned in this report. Note that the sectors are NOT mutually exclusive.

Name	Main Activities on At Least One Overnight Trip in Past 2 Years
River Outfitters	White water rafting
Sea Kayaking	Kayaking or canoeing – ocean
Backcountry Lodges	Remote or fly-in wilderness lodge Remote or fly-in wilderness outpost Wilderness lodge you can drive to by car
Cycling/Mountain Biking	Recreational cycling, same day excursion Cycling – as an overnight touring trip Mountain biking
History and Heritage	Archaeological digs Curatorial tours Historical re-enactments (as an actor) Interpretive program at a historic site or national/provincial park Historical replicas of cities or towns with historic re-enactments Children’s museums General history or heritage museums Science or technology museums Military/war museums Paleontological/archaeological sites Well known historic sites or buildings Other historic sites, monuments and buildings
Snowmobiling	Snowmobiling – Day use on organized trail Snowmobiling – As an overnight touring trip
Diving	Scuba diving in lakes/rivers Scuba diving in sea/ocean Snorkelling in lakes or rivers Snorkelling in sea/ocean
Nordic Ski/Related Activities	Cross country skiing Cross country or back country skiing as an overnight touring trip Snow shoeing Dog sledding Ski Jouring
Golfing	Golfing – played an occasional game while on a trip Golfing – played during a stay at a golf resort for one or more

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

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

TABLE A1: MAJOR ACTIVITY GROUPS – MAIN & ANY	Overnight Trip Activities - Canadian Pleasure Tourists			
	To British Columbia		To Any Destination*	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(7,788)	(7,788)	(23,156)	(23,156)
Weighted, Projected	6,002,103	6,002,103	19,946,295	19,946,295
Outdoor Land Based Activities	33.7%	76.7%	29.4%	66.9%
Outdoor Water Based Activities	34.2%	70.8%	33.3%	65.3%
Accommodation Stayed at	30.8%	73.4%	28.3%	63.8%
Outdoor Winter Activities	19.9%	34.8%	16.8%	29.7%
Performing Arts	16.6%	47.7%	17.6%	44.3%
Festivals & Events	15.3%	49.7%	15.8%	44.1%
Theme/Amusement Parks/Movies	14.5%	54.5%	15.4%	46.7%
Shopping/Dining/Food Related	13.0%	89.2%	16.0%	83.6%
Exhibits/Historic Sites/Museums	17.4%	68.2%	17.4%	58.5%
Spectator Sports	15.3%	33.8%	13.4%	27.5%
Team Sports/Tournaments/Games	9.0%	23.5%	8.8%	21.8%
Hands-On Learning Activities	4.2%	16.9%	3.7%	13.3%
Aboriginal Experiences	3.7%	17.5%	2.8%	11.3%
Air-Based Activities	0.5%	1.6%	0.3%	1.1%

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

TABLE A2: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN & ANY**	Overnight Trip Activities - Canadian Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(7,788)	(7,788)	(23,156)	(23,156)
Weighted, Projected	6,002,103	6,002,103	19,946,295	19,946,295
<i>In rank order by Main Reason – To British Columbia</i>				
Sunbathing or sitting on a beach	18.0%	45.1%	17.5%	40.2%
Camping - Public campground	13.2%	32.8%	11.6%	25.8%
Alpine skiing	12.8%	17.7%	8.4%	12.1%
Nature park	12.5%	38.8%	11.5%	29.9%
Swimming in lakes	9.3%	40.4%	8.8%	34.5%
Private campground	7.3%	22.9%	6.5%	18.4%
Swimming in oceans	6.8%	33.0%	8.4%	28.2%
Well known natural wonders	6.8%	31.2%	6.3%	23.8%
Hiking				
Hiking - same day excursion	6.5%	33.1%	5.3%	23.8%
Hiking/backpacking as an overnight trip	5.5%	9.1%	4.4%	7.4%
Kayaking/Canoeing - Freshwater	3.3%	11.9%	3.8%	11.6%
Wildlife - Whale/Marine	3.3%	15.5%	2.7%	11.0%
Recreational cycling – Same day Excursion	3.1%	13.7%	2.8%	11.0%
Fitness – Jogging/Exercise Outdoors	1.5%	15.7%	1.4%	11.2%
Kayaking/Canoeing - Ocean	1.4%	5.7%	0.8%	3.9%

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

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

	Overnight Trip Activities - Canadian Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(7,788)	(7,788)	(23,156)	(23,156)
Weighted, Projected	6,002,103	6,002,103	19,946,295	19,946,295
<i>In rank order by main reason within each subgroup (To British Columbia)</i>				
Cultural & Heritage				
Any Performing Arts	16.6%	47.7%	17.6%	44.3%
Festival & Events	15.3%	49.7%	15.8%	44.1%
Strolling around a city to see architecture	8.5%	50.0%	8.2%	40.5%
Historic Site/Buildings – well known	6.7%	38.6%	6.2%	29.7%
Live Theatre	4.7%	18.8%	5.6%	16.7%
Other Historic Sites/Buildings	4.5%	29.6%	4.3%	24.3%
Museum - History/Heritage	3.7%	29.7%	3.9%	23.1%
Photography	1.9%	22.5%	1.6%	15.1%
Sports				
Spectator Sports (Any)	15.3%	33.8%	13.4%	27.5%
Team Sports/Tournaments/Games	9.0%	23.5%	8.8%	21.8%
Entertainment				
Rock & Roll/Popular Concert	5.9%	13.9%		
Movies/cinema	3.2%	33.9%	3.7%	27.9%
Shopping				
Clothing, shoes, jewellery	5.5%	63.7%	6.9%	57.0%
Bookstores or music stores	2.9%	51.7%	3.4%	41.4%
Local arts & crafts studios	2.8%	47.3%	3.1%	37.5%
Retail Gourmet Foods	1.6%	22.3%	1.5%	17.6%
Food & Dining				
Dining – restaurants offering local ingredients and recipes	4.2%	65.1%	5.5%	57.1%
Dining - other high-end (not with international reputation)	2.6%	33.8%	2.8%	27.3%
Local outdoor cafes	2.4%	48.6%	2.8%	38.9%

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