



RESEARCH & PLANNING

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

Focus on Snowmobilers

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Acknowledgments

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

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

TAMS was a partnership of the following organizations:

The Ontario Ministry of Tourism	The Quebec Ministry of Tourism
The Ontario Tourism Marketing Partnership	Tourism Manitoba
The Canadian Tourism Commission	Tourism Saskatchewan
The Atlantic Canada Opportunities Agency	Alberta Economic Development
The Department of Canadian Heritage	Tourism British Columbia ¹
Parks Canada	The Government of Yukon
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I. Executive Summary

SNOWMOBILERS ARE A NICHE MARKET FOR BRITISH COLUMBIA

At nearly 500,000, *Snowmobilers* – Canadian adults who take vacations *in order to go snowmobiling during the day on organized trail or as an overnight touring trip* – are an important tourism market. They represent 1-in-40 of the 20.0 million Canadian overnight pleasure travellers to *any destination* and 1-in-53 of the 6 million Canadians who have come to British Columbia for a vacation during 2004 or 2005.

BRITISH COLUMBIA ATTRACTS SNOWMOBILERS AT A LOWER THAN AVERAGE RATE.

While a small niche market, Snowmobilers are less likely to have travelled to British Columbia recently as would be expected given their share of the total Canadian pleasure travel market. At approximately 112,498, this sector represents about 2% of the 6 million Canadian adults with pleasure travel experiences in British Columbia during 2004 or 2005.

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

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

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

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

SNOWMOBILERS TEND TO BE MEN IN THEIR MID-THIRTIES TO MID-FIFTIES.

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

SNOWMOBILERS ARE AFFLUENT AND SPAN WIDE EDUCATION RANGES.

Tourists in this niche market are almost equally split in terms of education, just under one-half have a high school diploma or less and just over one half have some post-secondary or higher education (diploma or degree). Snowmobilers are more apt to have higher incomes (more than 3-in-10 earn over **\$100,000**) than typical Canadian pleasure tourists.

NEARLY 1-IN-2 CANADIAN SNOWMOBILERS RESTRICT THEIR TRAVEL TO CANADA AND 3-IN-4 TRAVEL ONLY IN CANADA AND THE U.S.A.

When asked to identify the destinations of the overnight pleasure trips they took over a two-year period, close to one-half of Snowmobilers claim to have travelled only within Canada, and nearly three-quarters travel only in Canada and to the United States (and not other destinations), this is significantly higher than for Canadian travellers to B.C. and Canadian pleasure travellers as a whole.

ONTARIO AND QUEBEC ARE THE MAIN COMPETITORS FOR THESE TRAVELLERS.

Ontario (54%) and **Quebec** (48%) are the main provincial competitors for Canadian Snowmobilers. The **United States** (47%) clearly leads the International market but other foreign competitive destinations for Snowmobilers include the *Caribbean*, Mexico and *Europe*.

A SAFE DESTINATION IS A PRIORITY.

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

SNOWMOBILERS HAVE LIMITED INTEREST IN OTHER OUTDOOR ACTIVITIES.

They are not especially inclined to take vacations for the other types of activities of particular salience to British Columbia. Nonetheless, over 3-in-10 of them are also Anglers and/or Campers/RVers and about 1-in-4 are travellers on a self-guided tour.

On an individual trip activity basis, comparatively few outdoor experiences enjoy widespread popularity among Snowmobilers although 1-in-3 take trips in order to go fresh water fishing (main trip purpose) and nearly 1-in-2 go fishing as one of the activities they engage in on trips (any purpose).

As their predisposition to go to sun/sea destinations might suggest, they are especially interested in water-based travel experiences such as fishing and sunbathing on a beach. Sunbathing on a beach, along with exploring on an ATV and going camping, attracts about 1-in-4 Snowmobilers. In each case, the level of participation in these activities as one-of-many things to do is higher than the proportion of Snowmobilers who take trips motivated by these pursuits.

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

By and large, Snowmobilers 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. Even on a one-of-many basis, Snowmobilers are low engagement tourists for most cultural and heritage activities covered in the study. The only cultural/heritage activity to capture the interest of at least 1-in-3 Snowmobilers is **strolling around a city to observe its buildings and architecture**.

Entertainment-oriented activities are much more likely to have motivated Snowmobilers to take trips than are cultural activities. As noted above, these sledders are especially drawn by **amusement parks**, by **casinos** and taking in a **movie**. Similar to many entertainment-oriented activities, dining out at **restaurants offering local ingredients and cuisine**, dining in **high-end restaurants (not with an international reputation)** and visiting **local outdoor cafes** are much more common trip experiences (any) than trip drivers (main) for Snowmobilers.

Shopping for apparel, books or music, local arts and crafts and antiques is a common trip pastime for Snowmobilers but tends not to be the motivation for their recent overnight pleasure travel. Over 1-in-3 Snowmobilers attend

spectator-sporting events. The difference between *participation* rates (4-in-10) and *motivation* rates (3-in-10) is not as great as compared to the other categories.

THE ADVICE OF FRIENDS & RELATIVES TOPS THE CHART AS A TRIP PLANNING TOOL.

Of the many sources of travel information available to Snowmobilers anecdotal information provided by **friends and relatives** tops the chart (58%); this is followed by their own **past experience** (50%) and on the **internet** (50%), while around 1-in-4 rely on **travel agents, maps** and official **DMO travel guides**. Over 1-in-5 rely on **articles in newspaper/magazine** and/or **Visitor Information Centres**. 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. However, Snowmobilers rank **Internet Websites** as 3rd on their list, while it is rated as the main source for travel planning by Canadian pleasure travellers to any destination and B.C.

SNOWMOBILERS HAVE VERY FAVOURABLE IMPRESSIONS OF BRITISH COLUMBIA.

Canadian Snowmobilers are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel; they accord B.C. a rating of 8.6 on a ten-point scale. Though lower than B.C.'s, moderately favourable ratings are accorded a host of destinations, including **Hawaii** (8.3), **California** (7.6), **Florida** (7.3), **Alberta** (7.3), **Ontario** (7.3), **Nova Scotia** (7.0) and **Prince Edward Island** (7.0).

British Columbia is given the highest rating as an appealing destination for pleasure travel, and only 15% of Canadian Snowmobilers 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 SNOWMOBILERS TO BRITISH COLUMBIA.

At present, only two percent of Canadian pleasure travellers to the province are Snowmobilers. Regional marketing efforts to attract Snowmobilers may be challenging, particularly in light of air access challenges (such as increased airfares and reduced capacity), as these tourists are concentrated in Central Canada. Drawing these visitors from Central Canada during the winter months, especially if they wish to tow their own sleds behind their cars or trucks, may pose a substantive challenge. However, the closer proximity of the Albertan rubber tire/drive market could be exploited.

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II. Introduction

A. Background and Objectives

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

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

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

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

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

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

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

Whether in its cities, towns or countryside, British Columbia clearly offers a wide array of tourism experiences and attracts tourists from many different sectors. By learning more about Canadians who are in the market for some of these travel experiences,

British Columbia's tourism businesses can more effectively target their products and marketing efforts to attract tourists.

To support these efforts, *Experiences B.C. Sector Development Program*, Tourism British Columbia (TBC) and other stakeholders selected the following array of activity-based sectors as the focus of a series of Canadian tourist profiles based on the recently released 2006 Travel Activities and Motivation Survey.²

- River Rafters
- Backcountry Lodge Guests
- Recreational Cyclists/Mountain Bikers
- History and Heritage Tourists
- **Snowmobilers**
- Divers & Snorkellers
- Nordic Skiers & Other Non-Alpine Winter Sport Participants³
- Golfers
- Alpine Skiers
- Aboriginal Activity Tourists
- Anglers
- Self-Guided Overnight Touring Travellers
- Hikers
- Campers/RVers

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

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

³ Throughout this report, *Nordic Skiers* is used as a convenient "short form" to cover travellers who claim to have taken trips for any of the following main reasons in the past two years: cross-country skiing, ski touring, dog sledding, snow shoeing and cross-country or back country skiing as an overnight touring trip.

B. The Canadian Snowmobilers Report

For purposes of this report, Canadian **Snowmobilers** are Canadian adults (18 years of age or over) who claim to have taken an overnight pleasure trip to any destination in the past two years⁴ and indicate that one or more of the following was the **main reason** for at least one of the overnight trips they took over this same time period.

Main Reason for Trip

- *Snowmobiling – Day use on organized trail*
- *Snowmobiling – As an overnight touring trip*

People who take a trip *in order to* participate in snowmobiling are only a fraction of tourists who participate in sledding on their vacations. Of the 20.9 million Canadian Travellers, 4% (919,654) went snowmobiling during the day on an organized trail and 2% (344,618) went snowmobiling as an overnight touring trip, while on an out-of-town, overnight trip of one or more nights.⁵

Note to Readers

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

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

These winter enthusiasts – those for whom snowmobiling 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.

⁴ Since fieldwork for the TAMS study was conducted between January and June 2006, the “past two years” likely refers to 2004 and 2005. It is important to note, however, that when asked to report travel activities over a two-year period, consumers are prone to imprecision by focussing on “salient trips” (most memorable, most expensive, etc.) and/or by “telescoping” the specified time period (extending the time frame over which trips are reported beyond the specified two years). In light of this potential imprecision, a liberal interpretation of the “reference period” is advised. Throughout this report, the terms “past two years or so” and “recent” are commonly used to describe the “past two year” recall period.

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

The report provides the following information:

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

III. Overview of Canadian Tourism Activity Sectors

A. The Canadian Pleasure Travel Market to British Columbia

Tourism businesses in British Columbia are competing for the attention of about 20 million Canadian adults who are in the market for overnight vacations (see Table A).⁶ These individuals claim to have taken at least one overnight pleasure or vacation trip over a two-year period. They represent three-fifths of the 33 million Canadians.

Over two-fifths (42.9%) of the Canadian overnight pleasure travel market, or about 8.6 million tourists, have had *some* experience with British Columbia over the past decade.⁷ They may have been on a vacation or visiting friends and relatives while on their pleasure trip to the province. Of the overnight travellers who took trips for any reason, just under one-third claim to have visited British Columbia in the past two years or so (2004 and 2005) (30.1% or 6.0 million).

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

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

Most of these recent Canadian visitors to the province – 6 million of them – were on vacation or pleasure trips. In other words, while tourism businesses in British Columbia may be competing for the attention of about 20 million Canadian overnight pleasure travellers, they have attracted 3-in-10 (30.1%) of these tourists to the province over a two-year period. The profiles of various activity-based sectors⁸ described in this report are based on Canadians who have taken a recent overnight pleasure trip to *any destination* (20 million) and, where feasible, on the subset of these tourists who have taken an overnight pleasure trip to/in to British Columbia over the two-year period (6 million).⁹

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

⁷ Since fieldwork for the TAMS study was conducted between January and June 2006, the “past ten years” likely refers to 1995 through 2005 and the “past two years” likely refers to 2004 and 2005. See footnote in Section II.B for more information on interpreting these recall periods.

⁸ Sectors are defined in terms of selective activities as the *main reason* for a trip because these “dedicated” markets represent a crystallization of the interests and characteristics that might attract more casual participants to the activity (*any* participation). It is recognized that the sectors included in the profiles cover only a fraction of the experiences British Columbia offers its tourists.

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

B. Tourism Activity Sector Size¹⁰

Several outdoor-oriented tourism segments of importance to British Columbia represent relatively small *niche* markets, both within the overall Canadian pleasure travel market and among those who have recent tourism experience in British Columbia.¹¹ Examples of these niche markets include **River Rafters** and **Sea Kayakers**. Each of these sectors represents approximately 1-in-100 Canadian overnight pleasure travellers (see Table B).

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

TABLE B: OVERVIEW OF SELECTED SECTOR MARKET SIZE ¹	Canadian Overnight Pleasure Travellers In Past 2 Years				
	Any Destination		British Columbia		Index**
Unweighted base	(23,156)		(7,788)		
Weighted, Projected	19,946,295		6,002,103		
<i>In Rank Order by Tourists to British Columbia</i>					
Self-Guided Overnight Touring Travellers	3,531,758	17.7%	1,345,572	22.4%	127
Campers/RVers	3,205,733	16.1%	1,062,448	17.7%	110
Alpine Skiers	1,942,803	9.7%	896,103	14.9%	154
History and Heritage Tourists	2,420,162	12.1%	731,231	12.2%	100
Anglers	2,277,825	11.4%	651,917	10.9%	96
Hikers	1,523,989	7.6%	565,180	9.4%	124
Golfers	1,109,796	5.6%	431,021	7.2%	129
Recreational Cyclists/Mountain Bikers	761,808	3.8%	288,960	4.8%	126
Nordic Skiers	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.

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

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

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

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

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

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

C. Tourism Activity Sector Cross-Over

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

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

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

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

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

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

Chart B: Tourism Activity Sector Cross-Over								
<i>At least 20% Duplication</i>								
<i>Level of Duplication</i>	RIVER RAFTERS	SEA KAYAKERS	BACK-COUNTRY LODGES	CYCLISTS	HIKERS	DIVERS/ 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. Snowmobilers Market Profile

A. Market Composition

The Snowmobilers sector is composed of Canadian pleasure tourists who participated in snowmobiling as the *main reason* for an overnight trip in the past two years (2004 and 2005). They represent 1-in-40 of the 20.0 million Canadian overnight pleasure travellers to *any destination* and 1-in-53 of the 6 million Canadians who have come to British Columbia for a vacation in the past two years or so.

Those who snowmobile during the day (day trail users) dominate this sector, representing 4-in-5 Snowmobilers (79%). A further 1-in-2 Canadian tourists claim to have participated in overnight snowmobiling (50%).

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

TABLE C: MAIN REASON FOR TAKING OVERNIGHT TRIPS IN 2004-2005	Total Snowmobilers	Total Canadian Pleasure Tourists British Columbia	Total Canadian Pleasure Tourists Any Destination
<i>Unweighted Base</i>	(519)	(7,788)	(23,156)
<i>Weighted, Projected</i>	498,926	6,002,103	19,946,295
Snowmobilers	498,926	112,498	498,926
<i>Percentage</i>	100%	1.9%	2.5%
Snowmobiling- Day Use	395,268	91,235	395,268
<i>Percentage</i>	79.2%	1.5%	2.0
Snowmobiling - Overnight	247,587	29,526	247,587
<i>Percentage</i>	49.6%	0.5%	1.2%

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

Readers should bear in mind the prominence of the day use Snowmobilers in the following pages.

¹² Some Snowmobilers have participated in both day and overnight snowmobiling over a two-year period, explaining why the percentages shown above add to more than one hundred percent.

B. Regional and Demographic Characteristics

1. Place of Residence

At close to 500,000, Snowmobilers – Canadian adults who take vacations *in order to go snowmobiling* - are a niche market. They represent 1-in-40 of the 20.0 million Canadian overnight pleasure travellers to *any destination* (3%) and 1-in-53 of the 6 million Canadians who have come to British Columbia (2%) 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 Snowmobilers.

- Snowmobilers live in every province.
- Snowmobiling seems to be particularly popular among pleasure tourists who reside in the larger cities in Central Canada, such as **Montreal** (10%) and **Toronto** (7%).
- **Winnipeg** has the highest percentage of Snowmobilers (3%) in the Prairies.
- **Edmonton** has the highest percentage of Snowmobilers (4%) in the West.
- In contrast, Snowmobilers are less likely to live in the Maritimes.

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

TABLE 1: PLACE OF RESIDENCE	Snowmobilers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
Incidence of Snowmobilers	100%	1.9%	2.5%
Maritimes			
Halifax	0.7%	0.6%	1.2%
Quebec			
Quebec City	2.4%	0.4%	2.3%
Montreal	10.1%	4.1%	11.6%
Ontario			
Ottawa	1.5%	2.0%	2.9%
Oshawa	2.7%	0.5%	1.1%
Toronto	6.5%	9.1%	16.6%
Hamilton	2.4%	1.3%	2.2%
Kitchener	1.5%	0.7%	1.5%
St. Catharines-Niagara	1.0%	0.4%	1.1%
Manitoba			
Winnipeg	3.3%	2.4%	2.1%
Saskatchewan			
Regina	0.6%	0.9%	0.6%
Saskatoon	1.3%	1.2%	0.8%
Alberta			
Calgary	0.8%	9.0%	3.7%
Edmonton	3.8%	7.6%	3.4%
British Columbia			
Vancouver	2.6%	20.6%	7.7%
Victoria	0.1%	3.2%	1.1%

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

2. Personal and Household Characteristics

Age & Gender

While every age group is represented among Snowmobilers, they tend to be concentrated in **the middle of the age spectrum**. 2-in-5 are in their **mid-thirties to mid-forties** (37%) and close to 1-in-4 are in their **mid-forties to mid-fifties** (23%). While 1-in-10 are young adults (18 to 24 years, 10%), 1-in-6 are in their mid-twenties to mid-thirties (17%) and 1-in-7 are 55 years of age or older (13%) (see Table 2).

Snowmobilers' age distribution suggests a market in which middle-aged adults (37%) are over-represented compared to Canadian travellers as a whole (20%) and recent travellers to B.C. (19%) and older adults (55 years of age or over) are substantively under-represented. In fact, older Canadians represent only 1-in-7 Snowmobilers (13%) 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 **male** (64%) than female (36%) Snowmobilers.

Nearly **2-in-3 male** and over **1-in-2** female Snowmobilers are between **35 to 54** years of age (male 64%; female 52%).

Over 1-in-5 male and 1-in-3 female Snowmobilers are between the ages of 18 and 34 years (male 22%; female 35%) and 1-in-7 are aged 55 years and older (male 14%; female 13%).

TABLE 2: AGE & GENDER	Snowmobilers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
Age			
18 – 24 Years	9.5%	12.9%	12.7%
25 – 34 Years	17.3%	18.4%	18.8%
35 – 44 Years	36.6%	18.7%	20.4%
45 – 54 Years	23.2%	21.3%	20.2%
55 – 64 Years	9.6%	14.9%	14.4%
65+ Years	3.8%	13.9%	13.5%
Gender			
Men			
18 – 34 Years	22.4%	32.8%	32.2%
35 – 54 Years	63.9%	39.5%	41.0%
55+ Years	13.7%	27.7%	26.7%
Women			
18 – 34 Years	34.5%	29.8%	30.7%
35 – 54 Years	52.4%	40.4%	40.3%
55+ Years	13.0%	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

Snowmobilers are more **affluent** than Canadian pleasure visitors (to any destination).

Over 3-in-10 Snowmobilers 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 Snowmobilers have household incomes between \$60,000-\$99,999 (26%). Less than 1-in-5 Snowmobilers fall in the \$40,000-\$59,999 (16%) or under \$40,000 income categories (15%).

Tourists in this niche market are almost equally split in terms of education, just under one-half have a high school diploma or less (47%) and just over one half have some post-secondary or higher education (diploma or degree; 52%). More Snowmobilers have a **post-secondary diploma or certificate** (24%), than do Canadian travellers (to B.C. 20% or any destination 22%). However, close to 1-in-5 Snowmobilers have a **university degree** (19%) whereas 1-in-3 Canadian travellers (to B.C. or any destination) have a University degree.

Not surprisingly in light of the age categories that Snowmobilers fall in, a high percentage are **employed** (57%). More Snowmobilers are **self-employed** or are unpaid workers in a family business (16%) than are recent visitors to B.C. (13%) and the Canadian travelling public as a whole (10%). There are significantly fewer Snowmobilers who are retired (7%) compared to recent visitors to B.C. (18%) or the Canadian travelling public as a whole (17%).

TABLE 3: EDUCATION, OCCUPATION, INCOME	Snowmobilers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
Education			
High school diploma or less	47.4%	32.6%	36.7%
Some post-secondary	9.8%	11.9%	10.9%
Post-secondary diploma or certificate	23.9%	19.5%	21.6%
University degree+	18.6%	35.4%	30.0%
Occupation/Work Status			
Work 30+ hrs/week as paid employee	56.6%	58.3%	47.8%
Work as paid employee but part-time (less than 30 hrs/week)	4.2%	6.1%	5.4%
Self-employed/Unpaid worker at a family business	15.7%	12.8%	9.9%
Going to school	4.5%	6.5%	7.2%
Homemaker	2.8%	6.1%	5.5%
Retired	6.7%	17.8%	17.4%
Household Income			
Under \$40,000	15.0%	17.8%	20.6%
\$40,000 - \$59,999	16.1%	13.9%	14.6%
\$60,000 - \$99,999	26.3%	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 7-in-10 Snowmobilers **live with a spouse or partner** (with or without children) (75%) and over 1-in-3 live with a spouse/partner and **no children 17 years or younger** (37%), while 1-in-4 live with children 17 years or younger (25%) (see Table 4).

More Snowmobilers live with **children and no spouse/partner** (8%) than do *typical* tourists to British Columbia (5%) or any destination (7%). Fewer Snowmobilers live alone (7%) than do *typical* tourists to British Columbia (10%) or any destination (11%).

TABLE 4: HOUSEHOLD CHARACTERISTICS	Snowmobilers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	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	36.6%	38.6%	38.0%
With spouse/partner & children 17 years or under	24.9%	23.5%	22.0%
With spouse/partner & children 18 years & over but none under 17 years	13.6%	7.9%	7.8%
With children and no spouse	8.1%	5.1%	6.7%
Someone other than spouse/child	8.7%	13.4%	13.6%

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

V. Competitive Destinations

A. Worldwide Destinations for Overnight Pleasure Trips

When asked to identify the destinations of the overnight pleasure trips they took over a two-year period, virtually all Snowmobilers indicated that they have taken recent vacations within Canada and close to 1-in-2 claim to have travelled *only* within Canada (45%); this is significantly higher than for Canadian travellers to B.C. (28%), and Canadian pleasure travellers to any destination (36%) (see Table 5). Close to 1-in-2 have been to the United States on a recent overnight pleasure trip (47%), suggesting that the U.S.A. is a particularly attractive destination for these Snowmobilers. However, this is lower 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 less successful in attracting Snowmobilers (23%) vis à vis the general travelling public in Canada (30%).

Ontario (54%) and **Quebec** (48%) - and to a lesser extent **Alberta** (27%) - are the main provincial competitors for Canadian Snowmobilers. There are significantly more Snowmobilers who have travelled to **Quebec** (48%) than have Canadian pleasure visitors to B.C. (24%) and Canadian travellers as a whole to any destination (39%).

Note to Readers

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

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

The **United States** clearly leads the International market (47%) but other foreign competitive destinations for Snowmobilers include the *Caribbean* (16%), *Mexico* (15%) and *Europe* (7%). Apart from the Caribbean, Snowmobilers are less likely than *typical* tourists to British Columbia and any destination, to travel to other countries and regions.

TABLE 5: COMPETITIVE DESTINATIONS WORLDWIDE*	Snowmobilers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination
Unweighted base	Total (519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
Canada			
Newfoundland & Labrador	8.2%	3.4%	4.3%
Prince Edward Island	8.4%	6.3%	7.2%
Nova Scotia	12.6%	10.8%	11.7%
New Brunswick	15.0%	9.0%	12.6%
Quebec	47.6%	23.8%	38.5%
Ontario	54.0%	40.2%	52.8%
Manitoba	12.0%	16.0%	9.1%
Saskatchewan	16.2%	23.2%	11.2%
Alberta	26.8%	57.2%	25.4%
British Columbia	22.5%	100%	30.1%
Yukon	0.3%	3.1%	1.0%
Northwest Territories	0.7%	1.8%	0.7%
Nunavut	0.7%	0.5%	0.3%
United States	47.4%	59.8%	50.6%
Other Countries/Regions			
Mexico	15.0%	18.6%	12.0%
South/Central America	2.4%	5.6%	4.8%
Caribbean	16.3%	14.2%	15.4%
Europe (Incl. the UK and Russia)	7.3%	18.7%	15.6%
Asia	1.7%	8.7%	5.5%
Australia/New Zealand/ Africa	1.4%	4.3%	2.9%
Destination patterns			
Only Canada	45.4%	28.1%	35.6%
Canada & U.S.A. only	71.5%	54.5%	61.2%
Canada & Other Countries (Not USA)	52.6%	40.2%	49.4%
Canada & Mexico only	46.3%	30.7%	37.3%
U.S.A. only	0.1%	0.0%	2.2%

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

B. Destinations: Roles & Ratings

1. Importance of Destination

For most Canadian Snowmobilers the first consideration in planning their most recent **summer** trip was **destination** (34%) (see Table 8). At the same time, over 1-in-5 begins with the **type of vacation experience** they wish to have (22%) and 1-in-6 on the **activities** they wish to participate in (17%). This level of **activity-driven** planning is significantly higher than is the case among typical Canadian tourists to British Columbia (10%) or in the Canadian travel market as a whole (11%).

Like summer trips, when planning a **winter** trip most Canadian Snowmobilers first consideration was the **destination** (29%) followed by the **activities** they wish to participate in (19%). 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 (16%).

Although destination is important to Snowmobilers, with over 1-in-2 claiming that it is *extremely* or *very important* to them (52%), this is lower than Canadians with recent pleasure travel experience in British Columbia (63%) or travellers as a whole (62%).

TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION	Snowmobilers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
First Consideration for Most Recent Summer Trip			
Start with destination	34.3%	43.2%	37.8%
Start with activities	17.3%	9.6%	10.6%
Start with type of vacation experience	22.2%	18.4%	18.5%
Look for package deal (with out destination)	0.5%	1.1%	1.1%
First Consideration for Most Recent Winter Trip			
Start with destination	28.9%	32.5%	28.4%
Start with activities	19.3%	11.6%	9.1%
Start with type of vacation experience	16.0%	12.8%	11.4%
Look for package deal (with out destination)	3.1%	1.4%	1.9%
Importance of Destination			
Extremely/Very Important	52.0%	63.0%	62.1%
Extremely important	12.6%	23.9%	23.1%
Very important	39.4%	39.1%	39.0%
Average*	2.5	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

Snowmobilers resemble Canadian overnight pleasure travellers as a whole in terms of the conditions they accord *high importance* when selecting a destination. Like other Canadian tourists, Snowmobilers put *feeling safe* (58%) at the top of their list (see Table 9). Over 4-in-10 Snowmobilers place high importance on a destination that has *convenient access by car* (46%) and poses *no health concerns* (46%), while over 3-in-10 are interested in a destination that and has *many things for adults to see and do* (36%) and offers *mid-range lodging* (33%). Over 1-in-5 require the availability of *destination information on the internet* (22%), *availability of low cost packages* (21%), *direct access by air* (20%) and *lots for children to see and do* (20%).

Summary: Considerations Deemed *Highly Important* By At Least 1-in-4 Snowmobilers¹⁴

	Snowmobilers	Canadian Pleasure Tourists	
		To British Columbia	Any Destination
Feeling safe	57.8%	65.1%	65.9%
Convenient Access by Car	46.4%	36.2%	43.3%
No health concerns	46.3%	46.8%	49.9%
Lots for adults to see/do	36.0%	39.2%	38.0%
Mid Range accommodation	33.0%	29.6%	29.6%

Snowmobilers are more apt to take into account *convenient access by car* (46%) and *lots for children to see and do* (20%) than are visitors to B.C. (36% and 14% respectively) or Canadian travellers as a whole (43% and 16% respectively). Although 1-in-5 Snowmobilers indicated that *direct access by air* (20%) is an important consideration, this is lower than for visitors to B.C. (32%) or Canadian travellers as a whole (29%). This does not bode well for British Columbia, as the vast majority of this market is from Central Canada, which is not conveniently accessible by car (to B.C.).

Snowmobilers are **less interested** in having *information available on the internet* (22%) than are visitors to B.C. (26%) or Canadian travellers as a whole (25%) and they are also less interested in having *budget accommodation* available (16%) than are visitors to B.C. (22%) or Canadian travellers as a whole (22%).

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”.

Conditions rated as not being of high importance for Snowmobilers are: having convenient access by train/bus, having great shopping, having friends and relatives there, the availability of luxury accommodation, the culture being very different than their own and being disabled-person friendly.

TABLE 9: CONDITIONS FOR SELECTING A DESTINATION

	Snowmobilers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
<i>Bold rows are proportion stating "Highly Important" in rank order by Snowmobilers</i>			
Feeling safe	57.8%	65.1%	65.9%
Of no importance	4.2%	3.1%	3.5%
Convenient access by car	46.4%	36.2%	43.3%
Of no importance	8.2%	13.6%	11.5%
No health concerns	46.3%	46.8%	49.9%
Of no importance	5.5%	8.8%	8.2%
Lots for adults to see/do	36.0%	39.2%	38.0%
Of no importance	7.3%	7.2%	7.3%
Mid-range accommodation	33.0%	29.6%	29.6%
Of no importance	12.4%	12.6%	12.8%
Information available on internet	21.7%	25.7%	24.6%
Of no importance	32.8%	24.7%	27.1%
Low cost packages available	20.8%	20.9%	22.8%
Of no importance	27.2%	27.3%	23.1%
Direct access by air	20.3%	31.6%	28.9%
Of no importance	33.6%	17.0%	21.7%
Lots for children to see/do	20.2%	13.7%	16.4%
Of no importance	47.9%	62.0%	56.5%
Camping	16.9%	13.9%	12.8%
Of no importance	39.0%	48.7%	50.6%
Budget accommodation	15.7%	21.5%	21.7%
Of no importance	25.3%	23.4%	23.8%
Familiar with culture & language	14.0%	10.8%	13.6%
Of no importance	21.2%	28.6%	26.9%
Convenient access by train/bus	10.8%	11.4%	13.1%
Of no importance	54.0%	40.3%	39.3%
Great shopping	10.6%	11.1%	12.3%
Of no importance	42.1%	45.0%	43.2%
Have friends or relatives there	10.1%	10.2%	11.1%
Of no importance	64.4%	59.6%	59.0%
Luxury accommodation	8.1%	5.7%	6.8%
Of no importance	52.7%	57.5%	54.5%
Very different culture than own	6.2%	9.1%	8.9%
Of no importance	50.3%	39.6%	39.7%
Disabled-person-friendly	3.6%	3.6%	5.6%
Of no importance	79.5%	79.6%	73.8%

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

3. Appeal of Various Destinations

Canadian Snowmobilers are most enthusiastic about **British Columbia** as an *appealing destination* for pleasure travel; they accord B.C. a rating of 8.6 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** (8.3), **California** (7.6), **Florida** (7.3), **Alberta** (7.3), **Ontario** (7.3), **Nova Scotia** (7.0) and **Prince Edward Island** (7.0).

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

	<u>Canadian Pleasure Tourists</u>		
	<u>Snowmobilers</u>	<u>To British Columbia</u>	<u>Total</u>
British Columbia	8.6	9.0	8.8
Hawaii	8.3	8.1	8.3
California	7.6	7.4	8.4
Florida	7.3	6.5	8.7
Alberta	7.3	7.3	8.5
Ontario	7.3	6.6	9.2
Nova Scotia	7.0	7.2	8.4
Prince Edward Island	7.0	7.2	8.3

British Columbia is given the highest rating as an appealing destination for pleasure travel, and only 15% of Canadian Snowmobilers 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 Snowmobilers 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	Snowmobilers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
<i>Bold rows are average ratings**</i>			
British Columbia	8.6	9.0	8.8
No rating provided	15.1%	2.1%	12.4%
Newfoundland & Labrador	6.4	6.8	7.9
No rating provided	21.3%	19.5%	21.5%
Nova Scotia	7.0	7.2	8.4
No rating provided	14.8%	14.5%	16.3%
New Brunswick	6.8	6.5	8.3
No rating provided	15.8%	16.8%	16.9%
Prince Edward Island	7.0	7.2	8.3
No rating provided	17.8%	15.5%	16.6%
Quebec	6.3	6.7	9.0
No rating provided	9.8%	11.1%	10.2%
Ontario	7.3	6.6	9.2
No rating provided	8.1%	8.0%	8.0%
Manitoba	4.9	4.8	7.9
No rating provided	21.7%	14.6%	21.1%
Saskatchewan	4.7	4.8	7.9
No rating provided	20.0%	13.4%	20.7%
Alberta	7.3	7.3	8.5
No rating provided	16.3%	6.8%	15.3%
Yukon	6.1	6.4	7.5
No rating provided	27.1%	19.5%	24.9%
Northwest Territories	6.1	5.8	7.4
No rating provided	28.0%	21.1%	25.7%
Nunavut	4.5	5.0	7.2
No rating provided	31.0%	24.3%	28.1%
New York State	5.8	6.2	8.4
No rating provided	17.1%	14.1%	16.0%
Colorado	6.4	6.1	7.6
No rating provided	25.5%	19.9%	24.5%
Florida	7.3	6.5	8.7
No rating provided	12.4%	12.2%	13.5%
California	7.6	7.4	8.4
No rating provided	18.5%	10.5%	16.0%
Hawaii	8.3	8.1	8.3
No rating provided	17.7%	12.5%	17.1%
Arizona	6.9	6.5	7.8
No rating provided	21.8%	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 Snowmobilers' lists for having *many good reasons* to visit on a pleasure trip (see Table 11).¹⁷ Specifically, **British Columbia** tops the list with over 6-in-10 Snowmobilers 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 Snowmobilers (64%) *many good reasons* to visit. Other destinations with many reasons to visit, according to Snowmobilers are Hawaii (55%), California (47%), Florida (45%), Ontario (44%) and Alberta (41%).

Significantly more Snowmobilers than Canadian pleasure tourists to B.C. and any destination, state that there are many good reasons to visit **Florida** (45%) (visitors to B.C 35%; visitors to any destination 40%).

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

<u>Snowmobilers</u>	<u>Canadian Pleasure Tourists</u>				
		<u>To British Columbia</u>	<u>Total</u>		
B.C.	64%	B.C.	83%	B.C.	65%
Hawaii	55%	Hawaii	56%	Hawaii	55%
		California	50%		

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

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

TABLE 11: NUMBER OF REASONS TO VISIT
VARIOUS DESTINATIONS

	Snowmobilers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
<i>% stating "MANY" good reasons to visit In Rank order by Snowmobilers</i>			
British Columbia	63.9%	83.4%	64.6%
Hawaii	54.5%	55.5%	54.6%
California	47.2%	49.8%	47.1%
Florida	44.5%	35.0%	40.4%
Ontario	43.7%	35.4%	43.3%
Alberta	41.0%	45.3%	34.9%
Quebec	35.2%	35.3%	41.6%
Prince Edward Island	31.1%	33.8%	32.0%
Arizona	30.4%	22.1%	22.9%
Nova Scotia	29.1%	33.5%	32.4%
Newfoundland & Labrador	28.3%	30.3%	27.4%
New Brunswick	25.0%	21.3%	22.9%
Colorado	21.8%	17.8%	18.7%
New York State	21.5%	30.8%	30.4%
Yukon	18.2%	22.1%	16.9%
Northwest Territories	11.8%	15.5%	12.3%
Manitoba	9.9%	8.6%	7.5%
Nunavut	8.7%	11.0%	9.1%
Saskatchewan	7.7%	10.1%	7.7%

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

VI. Activities on Overnight Trips

A. Introduction

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

Not Necessarily in Canada or British Columbia

TAMS 2006 provides two important but independent measures - where tourists went and what tourists did. Even though the tourists singled out for special scrutiny in this report claim to have taken an overnight pleasure trip motivated by **participating in Snowmobiling** in the past two years, these activities are not linked to any specific destination these tourists claim to have visited over the same time period. Thus, a trip prompted by participating in Snowmobiling 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* Snowmobilers 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 Snowmobilers 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. Snowmobilers' Cross-Over with Other Trip Activity Sectors

As demonstrated by their representation in other activity-based tourism sectors, Snowmobilers are not especially inclined to take vacations for the other types of activities of particular salience to British Columbia.¹⁹ Nonetheless, over 3-in-10 of them are also **Anglers** (38%) and/or **Campers/RVers** (36%) and about 1-in-4 are **travellers on a self-guided tour** (24%) (see Table 12).

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

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

- Snowmobilers are four times as likely to be Backcountry Lodge Guests.
- They are three times as likely to be Anglers.
- Snowmobilers are twice as likely to be Aboriginal Activity Tourists, River Rafters, Golfers 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 Snowmobilers provided in this chapter are appended (see Table A1).

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

	Snowmobilers	All Canadian Pleasure Tourists		
	Total	To British Columbia	Any Destination*	Index to All Canadian Tourists** Snowmobilers
Unweighted base	(519)	(7,788)	(23,156)	
Weighted, Projected	498,926	6,002,103	19,946,295	
<i>In Rank order by Snowmobilers</i>				
Snowmobilers	100%	1.9%	2.5%	n/a
Anglers	37.6%	10.9%	11.4%	330
Campers/RVers	35.9%	17.7%	16.1%	223
Self-Guided Overnight Touring Travellers	23.7%	22.4%	17.7%	134
History and Heritage Tourists	16.1%	12.2%	12.1%	133
Alpine Skiers	15.5%	14.9%	9.7%	160
Golfers	14.7%	7.2%	5.6%	263
Backcountry Lodge Guests	13.1%	2.6%	2.9%	452
Hikers	9.3%	9.4%	7.6%	122
Aboriginal Activity Tourists	8.3%	3.7%	2.8%	296
Cycling/Mountain Biking	7.4%	4.8%	3.8%	195
Nordic Skiers	6.1%	3.8%	3.2%	191
River Rafters	3.1%	1.6%	1.1%	282
Divers & Snorkellers	2.7%	3.4%	2.3%	117
Sea Kayakers	0.5%	1.4%	0.8%	63

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

2. Major Trip Activity Groups

By definition, all Snowmobilers are motivated to take overnight pleasure trips in order to engage in snowmobiling. Consequently, they are all members of the more broadly defined outdoor winter activity market. Like most tourists however, Snowmobilers 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 snowmobiling 3-in-5 of these Canadians take trips motivated by engaging in at least one **water-based activity** (61%) and **land-based outdoor activities** (58%).
- 1-in-2 Snowmobilers stayed in an **accommodation** during a recent overnight pleasure trip (52%).
- Over 3-in-10 Snowmobilers are motivated by **Performing Arts** (36%), attending **Spectator Sports** (35%), attending **Theme parks and movies** (33%) as well as **Festivals and Events** (30%).

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, more Snowmobilers *participated* in at least one performing arts experience while on a recent overnight pleasure trip (53%) than claim to have taken a trip motivated by one of these activities (36%).

Shopping and dining experiences are especially likely to be “one-of-many” trip activities (88%) but the driving force behind a trip for relatively few segment members (28%). Similarly, over 5-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, Snowmobilers are nearly six times as likely to identify winter outdoor activities, and nearly three times as likely to identify aboriginal experiences, team sports/tournaments/games and spectator sports, as ones that *motivated* recent trips (main reason).

They are twice as likely as *all* Canadian overnight pleasure travellers are, to identify air-based activities, theme/amusement parks and performing arts and 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 Snowmobilers 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 Snowmobilers, compared to all Canadian Pleasure travellers.

<u>Major Activity Group</u>	<u>Main Reason</u>		<u>Any Participation</u>	
	Snowmobilers	All Canadian Pleasure Tourists	Snowmobilers	All Canadian Pleasure Tourists
Outdoor Winter Activities	100%	17%	100%	30%
Aboriginal Experiences	8%	3%	13%	11%
Team Sports/ Tournaments/ Games	23%	9%	39%	22%
Spectator Sports	35%	13%	47%	28%

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	Snowmobilers	
	Main Reason	Any Participation
Unweighted base	(519)	(519)
Weighted, Projected	498,926	498,926
<i>In Rank order - Main Reason</i>		
Outdoor Winter Activities	100.0%	100.0%
Snowmobiling - Day Use	79.2%	82.1%
Snowmobiling - Overnight	49.6%	49.9%
Outdoor Water Based Activities	60.6%	85.4%
Outdoor Land Based Activities	58.1%	83.5%
Accommodation Stayed at	52.3%	82.9%
Performing Arts	35.9%	53.2%
Spectator Sports	35.2%	47.0%
Theme/Amusement Parks/Movies	32.8%	59.9%
Festivals & Events	30.4%	59.2%
Shopping/Dining/Food Related	28.4%	87.8%
Team Sports/Tournaments/Games	23.4%	38.7%
Exhibits/Historic Sites/Museums	23.3%	55.7%
Aboriginal Experiences	8.3%	12.8%
Hands-on Learning Activities	6.5%	20.5%
Air Based Activities	0.7%	2.2%

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

3. Individual Trip Activities: The Outdoors

On an individual trip activity basis, comparatively few outdoor experiences enjoy widespread popularity among Snowmobilers, although about 1-in-3 take trips in order to go fishing (fresh water, main purpose 32%) and nearly 1-in-2 go fishing as one of the activities they engage in on trips (any purpose, 46%) (see Table 14).²¹

Land Based Activities:

- 1-in-4 Snowmobilers enjoy camping in a public campground (25%) and 1-in-5 enjoy exploring on an ATV (22%). In each case, the level of participation in these activities as one-of-many things to do is higher than the proportion of Snowmobilers who take trips motivated by these pursuits.
- Staying at a private campground or lakeside or riverside resort, are motivations for recent overnight pleasure trips for around 1-in-6 Snowmobilers (private campground 18% and lakeside or riverside resort 13%).

Water based Activities:

- 1-in-3 Snowmobilers enjoy fishing, especially in fresh water (32%) and nearly 1-in-4 enjoy sunbathing or sitting on a beach (24%).
- Nearly 1-in-5 Snowmobilers enjoy swimming in lakes (18%) and motor boating (18%) and 1-in-10 like swimming in oceans (11%).

Comparison to Canadian Pleasure Travellers

Compared to the typical Canadian overnight pleasure traveller, a Snowmobiler 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 Snowmobilers represent a distinctive market.

These Snowmobilers participate in both summer and winter outdoor activities, in fact they are about forty times more likely than Canadian pleasure travellers to go snowmobiling, both during the day and overnight. They are ten times more likely to go exploring on an ATV (day use and overnight), they are seven times more likely to go windsurfing or small game hunting, they are over six times as likely to go in-line roller blading, ice fishing, or big game hunting and are over five times as likely to go

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 Snowmobilers provided in this chapter are appended (see Table A2).

hunting for birds, trophy fishing, or snorkelling in lakes/ivers than Canadian pleasure travellers.

Summary of Outdoor activities where Snowmobilers are more than five times as likely than Canadian Pleasure Travellers to be motivated by (main reason) for a recent overnight trip.²² (In rank order from highest – Snowmobiling, overnight 41 times - to lowest, snorkelling in lakes/ivers 5 times more likely than Canadian Pleasure Travellers).

	<u>Main Reason</u>		<u>Any Participation</u>	
	Snow- mobilers	All Canadian Pleasure Tourists	Snow- mobilers	All Canadian Pleasure Tourists
Snowmobiling - Overnight	49.6%	1.2%	49.9%	1.7%
Snowmobiling - Day Use	79.2%	2.0%	82.1%	4.4%
All Terrain Vehicle Same Day	22.4%	2.2%	38.7%	7.6%
All Terrain Vehicle Overnight	9.9%	1.0%	16.6%	2.1%
Windsurfing	0.7%	0.1%	1.4%	1.1%
Hunting - Small Game	9.1%	1.3%	11.8%	2.1%
In-Line / Roller Blading	1.9%	0.3%	6.2%	3.0%
Fishing - Ice Fishing	16.9%	2.7%	23.6%	5.2%
Hunting - Big Game	18.0%	3.0%	18.8%	3.9%
Hunting - Birds	5.1%	0.9%	6.3%	1.5%
Fishing - Trophy Fishing	2.7%	0.5%	3.7%	0.7%
Snorkelling in Lakes/ivers	1.6%	0.3%	7.0%	2.4%

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 Snowmobilers declare an activity as a main reason for an overnight pleasure trip.

TABLE 14: INDIVIDUAL OUTDOOR ACTIVITIES –
MAIN & ANY*

	Snowmobilers	
	Main Reason	Any Participation
Unweighted base	(519)	(519)
Weighted, Projected	498,926	498,926
<i>In Rank order - Main Reason</i>		
Snowmobiling - Day Use	79.2%	82.1%
Snowmobiling - Overnight	49.6%	49.9%
Fishing - Fresh Water	31.8%	46.2%
Camping - Public campground	24.8%	38.4%
Sunbathing or sitting on a beach	24.0%	50.6%
All Terrain Vehicle Same Day	22.4%	38.7%
Private Campground (Lodging)	18.3%	36.0%
Swimming in lakes	17.6%	52.6%
Motor Boating	17.5%	41.0%
Lakeside/Riverside Resort (Lodging)	13.0%	34.0%
Swimming in oceans	11.2%	29.7%

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

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

By and large, Snowmobilers utilize destinations' cultural, culinary and retail infrastructure as *things to see and do* while on overnight pleasure trips rather than as the driving force behind or motivation for their trips.²³ Spectator sporting events are also common trip drivers, attracting over 1-in-3 Snowmobilers (see Table 15).

Culture

Even on a one-of-many basis, Snowmobilers are low engagement tourists for most cultural and heritage activities covered in the study. The only cultural/heritage activity to capture the interest of at least 1-in-3 Snowmobilers is **strolling around a city to observe its buildings and architecture** (Main, 8%; Any, 35%).

Entertainment

Entertainment-oriented activities are much more likely to have motivated Snowmobilers to take trips than are cultural activities. As noted above, these sledders are especially drawn by **amusement parks** (Main, 20%; Any, 36%), by **casinos** (Main, 11%; Any, 33%) and taking in a **movie** (Main, 11%; Any, 36%). All of these entertainment-oriented experiences are much more commonly identified as *one among many* trip activities than as a main reason for taking a trip among Snowmobilers.

Dining

Similar to many entertainment-oriented activities, dining out at **restaurants offering local ingredients and cuisine** (Main, 9%; Any, 60%), dining in **high-end restaurants (not with an international reputation)** (Main, 5%; Any, 31%), and visiting **local outdoor cafes** (Main, 4%; Any, 44%) are much more common trip experiences (any) than trip drivers (main) for Snowmobilers.

Shopping

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

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

Sports

Over 1-in-3 Snowmobilers attend spectator-sporting events. The difference between *participation* rates (4-in-10) and *motivation* rates (3-in-10) is not as great as compared to the other categories.

Comparison to Canadian Pleasure Travellers

As noted in the previous section, compared to *all* Canadian overnight pleasure travellers, Snowmobilers are more likely to engage in outdoor activities or take trips for these activities. These sledding 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 Snowmobilers are *five times* more likely than Canadian Pleasure Travellers to be *motivated by (main reason)* for a recent overnight trip.²⁴ (In rank order from highest – Auto Races at 8 times - to lowest, Paintball at 5 times more likely than Canadian Pleasure Travellers).

<u>Other Activities</u>	<u>Main Reason</u>		<u>Any Participation</u>	
	Snow- mobilers	All Canadian Pleasure Tourists	Snow- mobilers	All Canadian Pleasure Tourists
Auto Races	17.4%	2.1%	22.0%	3.9%
Badminton	1.5%	0.2%	2.3%	1.9%
Equine (Horse) Competitions	2.6%	0.4%	3.2%	1.2%
International Film festival	2.4%	0.4%	2.7%	1.8%
Baseball or Softball	9.6%	1.7%	11.8%	3.0%
Western Theme Events/Rodeos	6.5%	1.3%	11.5%	3.5%
Paintball	1.5%	0.3%	2.9%	0.8%

Snowmobilers are more likely to engage in outdoor activities or take trips for these activities. They are about twice as likely to be motivated to go to the movies, to attend a spectator sporting event, to go to an amusement park, to shop for clothing, shoes and jewellery and to attend arts performances 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 Snowmobilers declare an activity as a main reason for an overnight pleasure trip.

TABLE 15: OTHER INDIVIDUAL ACTIVITIES – MAIN & ANY*	Snowmobilers	
	Main Reason	Any Participation
Unweighted base	(519)	(519)
Weighted, Projected	498,926	498,926
<i>In rank order by main reason within each subgroup</i>		
Cultural & Heritage		
Any Performing Arts	35.9%	53.2%
Festival & Events	30.4%	59.2%
Strolling around a city to see architecture	8.1%	34.8%
Sports		
Spectator Sports (Any)	35.2%	47.0%
Entertainment		
Amusement Park	20.1%	36.0%
Casino	11.1%	33.3%
Movies/cinema	10.7%	36.2%
Shopping		
Clothing, shoes, jewellery	14.1%	61.4%
Bookstores or music stores	6.1%	38.0%
Local arts & crafts studios	4.1%	36.0%
Antiques	3.6%	34.7%
Food & Dining		
Dining – restaurants offering local ingredients and recipes	8.8%	60.4%
Dining - other high-end (not with international reputation)	4.7%	31.0%
Local outdoor cafes	4.4%	43.9%

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 Snowmobilers as ones they participated in (**any**) on a recent overnight trip.

5. Overnight Cruises & Organized Group Tours

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

More Snowmobilers claim to have taken **self-directed** same day touring trips over a two-year period (36%) than self-directed day tours that are not organized (24%).

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

TABLE 16: CRUISES/GROUP TOURS	Snowmobilers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
Took any overnight cruise in past 2 years			
Type of Cruise/Destination			
Ocean (Net)	6.7%	12.6%	8.8%
Ocean – Caribbean	5.1%	5.9%	5.3%
Ocean – Other	1.3%	5.1%	3.2%
Ocean – Alaska	0.5%	4.0%	1.7%
Lake or River cruise (Net)			
St. Lawrence River	1.6%	0.7%	1.9%
Other lake/River	4.8%	2.2%	2.3%
Great Lakes	1.3%	0.4%	0.8%
Touring			
Overnight group tour – multiple locations	7.7%	12.2%	10.2%
Overnight group tour – Single Location	10.4%	8.2%	7.9%
Organized group tour – same day	19.3%	28.3%	21.9%
Self-Directed tour – same day	35.9%	34.8%	28.6%
Self-Directed tour – not organized	23.7%	22.4%	17.7%
Unspecified same day tours	2.3%	1.9%	2.9%
Type of Organized Day Tour <i>(In rank order by Snowmobilers)</i>			
Countryside	28.1%	26.4%	22.0%
City	21.5%	28.4%	22.9%
Wilderness/outdoor	21.5%	15.6%	12.7%
Sightseeing cruise (day excursion)	17.7%	15.9%	12.8%
Casino	8.1%	6.6%	6.5%
Wineries	4.9%	8.7%	5.6%
Factory	4.4%	4.2%	2.6%
Airplane/helicopter (pilot or passenger)	1.2%	3.0%	1.9%

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

VII. Trip Planning

A. Who Does the Planning?

The majority of Snowmobilers claim to have *personal involvement* in trip planning for **all** or **most** trips planned over the past two years (2004 and 2005).

In most households, the main responsibility for travel planning falls equally with the Snowmobiler and other household member/s.

TABLE 17: TRAVEL PLANNING	Snowmobilers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
Frequency of personal involvement in trip planning, past 2 years			
All	57.0%	65.9%	61.8%
Most	19.5%	16.7%	15.1%
Some	13.2%	9.6%	10.3%
None/not stated	10.3%	7.8%	12.8%
Main responsibility for trip planning			
Respondent	31.9%	37.8%	34.9%
Shared with other household member	31.2%	28.7%	27.6%
Spouse/partner	15.9%	15.0%	13.5%
Other/not stated/not involved in travel planning	13.7%	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 Snowmobilers anecdotal information provided by **friends and relatives** tops the chart (see Table 18). Nearly 6-in-10 of these tourists rely on the advice of friends or relatives (58%), 5-in-10 rely on their own **past experience** (50%) and on the **internet** (50%) for travel information, while around 1-in-4 rely on **travel agents** (27%), **maps** (26%) and official **DMO travel guides** (24%). Over 1-in-5 rely on **articles in a newspaper/magazine** (23%) and/or **Visitor Information Centres** (22%). 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. However, Snowmobilers rank **Internet websites** as 3rd on their list, while it is rated as the main source for travel planning by Canadian pleasure travellers to any destination and B.C.

Although not a commonly used source of information, consumer travel shows or sportsmen's shows are more widely used by Snowmobilers (12%) 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 Snowmobilers, Recent Pleasure Tourists to British Columbia and Any Destination

(In rank order in each column)

<u>Snowmobilers</u>	<u>Canadian Pleasure Tourists</u>	
	<u>To British Columbia</u>	<u>Total</u>
Advice of friends/relatives	Internet website	Internet website
Past experience	Advice of friends/relatives	Advice of friends/relatives
Internet website	Past experience	Past experience
	Maps	Travel Agent
	Travel agent	

With over 1-in-3 Snowmobilers saying that they *normally* visit **travel websites** (34%), the internet has great potential for businesses in British Columbia that wish to attract Snowmobilers. Snowmobilers are more apt to watch **televised travel shows** (31%) than to read the **travel section** in their daily newspaper (14%).

General **travel magazines** such as *Condé Nast* are less popular (13%) than are **outdoor activities/sports magazines** such as *Backpacker* or *Outdoor Life* among Snowmobilers (26%) but readership for both is higher amongst Snowmobilers than it is for recent visitors to B.C. or the Canadian travelling public as a whole. **Automobiles/Cycles** and

Entertainment/Music and are the most popular magazines amongst Snowmobilers (36% and 30% respectively).

Frequent readership of travel sections in a local newspaper's weekend or weekday editions is less common among Snowmobilers 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	Snowmobilers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
<i>In rank order by Snowmobilers</i>			
SOURCES OF TRAVEL PLANNING INFO			
Advice of friends/relatives	57.7%	52.4%	44.9%
Past experience	50.0%	52.1%	43.9%
Internet website	49.8%	67.2%	57.2%
Travel agent	27.2%	36.0%	30.4%
Maps	25.6%	39.0%	28.6%
Official DMO travel guides	24.4%	27.2%	22.7%
Articles in Newspaper/Magazine	23.3%	21.3%	18.4%
Visitor information centres	21.5%	24.7%	20.5%
Advertisements in Newspaper/Magazine	15.8%	12.8%	12.5%
Auto club	14.8%	19.9%	15.6%
Trade, travel, sportsmen's shows	12.4%	3.2%	2.7%
Television Programs	11.6%	9.0%	6.6%
Travel information in mail	10.7%	7.6%	7.8%
Television Advertisements	6.4%	4.0%	4.5%
Travel guide books	5.6%	18.1%	11.8%
Electronic newsletters via e-mail	2.6%	4.6%	3.7%
TRAVEL MEDIA			
Frequently read Travel Section daily newspaper	13.8%	21.1%	17.9%
Frequently read weekend edition of newspaper	15.3%	24.8%	21.9%
Magazines read in typical month (In rank order by Snowmobilers)			
Automobiles/Cycles	35.8%	13.7%	13.1%
Entertainment/Music	30.1%	31.1%	32.0%
General Interest	27.1%	33.0%	30.7%
Outdoor activities/sports	26.3%	15.4%	12.6%
Food & Cooking	25.5%	26.2%	26.5%
Fashion & Beauty	25.2%	21.6%	23.3%
Home & Garden	24.6%	23.8%	24.5%
News magazine	18.8%	25.8%	23.6%
Business/Finance	18.2%	19.0%	16.0%
Professional sports	16.6%	9.1%	8.5%
Science and geography	15.7%	20.6%	16.3%
Crafts/antiques/collectibles	14.9%	13.0%	12.7%
Health, fitness and well living	14.3%	24.7%	21.7%
Travel	12.7%	11.3%	11.5%
Normally watch Travel Shows on TV	30.5%	33.1%	30.3%
Normally visit Travel websites	34.4%	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, 1-in-2 Snowmobilers who have taken a recent pleasure trip to British Columbia rely on the internet for travel planning (50%).

Hotel/resort sites (27%), **destination marketing organization** sites (23%), **travel** sites such as *Expedia* or *Travelocity* (21%), **airline** sites (19%) and **attractions** sites (18%) are the most commonly used websites among these Canadian tourists who rely on the internet for travel planning (see Table 19). Although 1-in-2 Snowmobilers rely on the internet (50%) for Travel planning, it is lower 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-4 Snowmobilers claim to have made a travel-related booking on-line over the past two years or so (27%). As their website preferences would suggest, the most common on-line bookings for Snowmobilers is for **accommodation** (22%), followed by **air tickets** (17%) and, to a lesser degree, tickets for attractions (9%) and car rentals (8%).

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

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING	Snowmobilers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
Unweighted base	Total (519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
Used Internet website for vacation information, past 2 years	49.8%	67.2%	57.2%
Internet website(s) used			
<i>(Among Users, in rank order by Snowmobilers)</i>			
Hotel/resort	27.3%	40.2%	31.9%
Destination marketing organization	22.9%	34.4%	27.7%
Travel planning/booking	20.6%	34.4%	25.6%
Airline	18.9%	39.2%	25.8%
Attraction	17.7%	23.7%	19.1%
Cruise	3.8%	6.2%	4.5%
Motorcoach	0.9%	1.6%	1.4%
Other	13.4%	17.4%	15.4%
Any Internet Bookings in Past 2 Years	26.7%	49.2%	36.6%
<i>(Among All Overnight Pleasure Travellers)</i>			
Items Purchased On-Line			
<i>(Among Users, in rank order by Snowmobilers)</i>			
Accommodation	(100%)	(100%)	(100%)
Air tickets	21.5%	33.8%	25.2%
Tickets for activities/attractions	17.2%	39.2%	25.1%
Car rental	8.9%	11.9%	8.5%
Package deal (2+ items)	7.5%	16.5%	9.8%
Rail, bus, boat tickets	5.9%	7.7%	5.6%
	3.0%	8.7%	5.6%

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

VIII. Other Travel-Related Information

A. Use of Package Deals

Purchase of package deals in the past two years (2004 and 2005) is relatively uncommon among Snowmobilers (see Table 20). 1-in-15 say they relied on a package deal for *all* or *most* of their trips (7%) over the past two years or so and a over 1-in-4 have used package deals for *one* or *some* of these trips (27%).

Snowmobilers who purchase packages want them to include accommodation (85%), transportation to the destination (70%) and food and beverages (65%). Somewhat fewer would like the package to include tickets for activities and attractions (56%) and transportation at the destination (55%).

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

TABLE 20: PACKAGE DEALS	Snowmobilers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
	Total	(7,788)	(23,156)
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
Frequency of Purchasing Packages in Past 2 Years			
Most/all trips	6.7%	5.9%	7.1%
One/some trips	27.0%	27.0%	23.9%
No trips/not stated/not sure	66.3%	67.1%	68.9%
Desired Components of Packages (Among Purchasers of Packages)			
<i>In rank order by Snowmobilers</i>			
Accommodation	85.1%	84.4%	81.4%
Transport to destination	69.7%	80.2%	72.2%
Food and beverage	65.3%	48.5%	52.2%
Tickets for activities/attractions	56.1%	43.1%	45.2%
Transport at destination	55.3%	51.9%	49.8%
Other	12.4%	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 7-in-10 Snowmobilers is a **break from the day-to-day environment** (72%) and the ability to **relieve stress** (69%) (see Table 21).²⁵

About 6-in-10 Snowmobilers are interested in **abandoning a fixed schedule** (63%) while on vacation, or to help **enrich familial relationships** (60%) or be the basis of lasting **memories** (58%). 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 Snowmobilers and Recent Pleasure Tourists to British Columbia and Any Destination²⁶

<u>Snowmobilers</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
No fixed schedule	Memories	Enrich Relations–partner/children
Enrich Relations – partner/children	Enrich Relations–partner/children	Memories
Memories	New/different	No fixed schedule

While not as widely endorsed as those cited above **keeping family ties alive** or to **see and do something new or different** are important benefits of pleasure travel experiences for over 4-in-10 Snowmobilers. Benefits with low appeal to Snowmobilers include renewing connections with people (other than family), being physically challenged²⁷, enriching their perspectives on life, gaining knowledge of history, other cultures or other places, having stories to tell once the trip is over, being pampered, experiencing solitude and isolation and stimulating their minds or being intellectually challenged.

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	Snowmobilers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
<i>% Stating "Highly Important"</i>			
<i>In rank order by Snowmobilers</i>			
Break from day-to-day environment	72.1%	66.5%	66.8%
Relax/relieve stress	69.4%	65.0%	65.4%
No fixed schedule	62.5%	42.8%	47.8%
Enrich relationship with partner/children	59.8%	54.5%	52.8%
Create lasting memories	57.6%	55.6%	52.3%
Keep family ties alive	43.0%	43.6%	43.5%
See/do something new/different	40.9%	49.3%	44.0%
Physical challenge	18.0%	18.1%	15.7%
Renew personal connections (non-family)	18.0%	20.3%	18.9%
Enrich perspectives on life	17.9%	31.9%	27.7%
Knowledge of history, cultures, places	16.8%	27.7%	24.3%
Stories to share	15.6%	12.4%	12.9%
To be pampered	15.1%	9.9%	13.3%
Solitude and isolation	12.6%	8.9%	9.3%
Stimulate mind/intellectual challenge	11.3%	19.3%	17.4%

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.

C. Incidence of Summer/Winter Trips

Almost all Snowmobilers say that they have taken an overnight pleasure trip during the **summer months** (93%); this is higher than the Canadian travelling public as a whole (86%), and those with recent travel to British Columbia (90%) (see Table 22).

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

	Snowmobilers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
Took Overnight Pleasure Trip in Past 2 Years			
In . . .			
Summer	92.7%	89.7%	86.4%
Winter	86.0%	70.4%	64.0%

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

D. Memberships in Various Organizations

Auto club membership is characteristic of nearly 3-in-10 Snowmobilers (29%) (see Table 23). Over 2-in-10 claim to have membership in a sports club (24%) and are members of a frequent flyer program (20%).

Compared to the Canadian travelling public as a whole and recent visitors to British Columbia, Snowmobilers memberships are lower for all listed organizations, with the exception of Travel Clubs (6%) which is higher for Snowmobilers than the Canadian travelling public as a whole (2%) and recent visitors to British Columbia (3%).

TABLE 23: MEMBERSHIPS	Snowmobilers	All Canadian Pleasure Tourists	
	Total	To British Columbia	Any Destination*
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
<i>In rank order by Snowmobilers</i>			
Auto club	28.9%	46.5%	38.3%
Sports club	23.8%	28.9%	23.5%
Frequent flyer program	20.1%	38.3%	25.7%
Hotel/car rental loyalty program	10.4%	14.0%	8.8%
Community service club	9.2%	11.2%	10.7%
Travel club	5.9%	2.9%	2.1%
Book/reading club	4.2%	5.4%	4.9%
Hobby club	3.6%	5.4%	4.6%
Nature/environmental club	3.0%	4.6%	3.5%

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

E. Shelter Used Most Often on Camping Trips

Over 1-in-2 Canadian Snowmobilers have taken a camping trip in the past two years (56%). Of these Snowmobilers that camp, they use a *tent* most often for shelter on recent camping trips (28%) to a much greater extent than they rely on a *motor home or RV* for shelter (8%).

Use of a Travel Trailer/Fifth Wheel (11%) or a Motor Home/RV (8%) among Snowmobilers who go camping, is higher than is the case among typical Canadian tourists (6% and 3% respectively) who have been camping and those who have recently travelled to British Columbia (7% and 5% respectively).

	Snowmobilers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
Took Camping Trip in Past Two Years (2004 and 2005).	55.7%	46.2%	40.0%
<i>In rank order by Snowmobilers</i>			
Tent	28.3%	28.2%	25.4%
Travel trailer/fifth wheel	10.7%	7.1%	6.0%
Truck camper or van	4.4%	3.3%	2.0%
Tent trailer	4.8%	2.7%	3.2%
Motor home or RV	7.5%	5.0%	3.4%

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

F. Lodging

Use of lodging among Snowmobilers (83%) is higher than is the case among typical Canadian tourists (64%) and those who have recently travelled to British Columbia (73%).

Campgrounds are a popular form of accommodation for Snowmobilers while on vacation. Close to 2-in-5 Snowmobilers have stayed at a public campground (38%), or have camped in a private campground (36%), while 1-in-5 have stayed in a wilderness setting (21%).

More Snowmobilers stay at a lakeside/riverside resort (34%) than at a seaside resort (19%), or ski resort or mountain resort (18%).

1-in-6 Snowmobilers have stayed at a wilderness lodge (accessible by car) (16%), while 1-in-24 have stayed at a remote/fly-in wilderness lodge (4%) and 1-in-40 have stayed at a remote/fly-in wilderness outpost (3%).

TABLE 25: LODGING USED WHILE ON AN OVERNIGHT PLEASURE TRIP IN PAST TWO YEARS (2004 and 2005)	Snowmobilers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
	Total		
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
<i>In rank order by any participation within each subgroup (Snowmobilers)</i>			
Used Any Lodging	82.9%	73.4%	63.8%
Camping			
Public campground in national/provincial/state park	38.4%	32.8%	25.8%
Private Campground	36.0%	22.9%	18.4%
Campsite in wilderness setting	21.4%	12.1%	8.4%
Resort/Spa			
Lakeside/riverside resort	34.0%	26.6%	22.1%
Seaside Resort	18.8%	26.5%	20.3%
Ski resort or mountain resort	18.4%	23.8%	13.6%
Health Spa	9.8%	6.9%	5.8%
Backcountry Lodge/Outpost			
Wilderness Lodge By Car	15.7%	5.6%	5.5%
Remote/Fly-In Wilderness Lodge	4.1%	2.7%	1.6%
Remote/Fly-In Wilderness Outpost	2.5%	1.0%	0.6%
Motorhome/RV while touring (not camping)	10.9%	7.0%	4.5%
Farm or guest ranch	8.3%	4.5%	2.9%
Houseboat	2.9%	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

Substantially more Snowmobilers have regular access to **cottages and/or cabins** (61%) than do recent visitors to British Columbia (32%) and the Canadian travelling public as a whole (33%). Snowmobiler's access to cottages and/or cabins in their home province (53%) is also significantly higher than recent visitors to British Columbia (25%) and the Canadian travelling public as a whole (28%).

Close to 7-in-10 Snowmobilers own snowmobiles (69%); ownership of this type of equipment is appreciably higher among Snowmobilers than it is among recent visitors to British Columbia (7%) and the Canadian travelling public as a whole (10%). Not only are Snowmobilers especially likely to own a snowmobile, but they are also much more likely to own ATVs (47%), motor boats (37%), motor homes/RVs (28%) and Canoes or kayaks (27%) than are recent visitors to British Columbia and the Canadian travelling public as a whole.

TABLE 25: RECREATION OWNERSHIP	Snowmobilers	All Canadian Pleasure Tourists	
		To British Columbia	Any Destination*
	Total		
Unweighted base	(519)	(7,788)	(23,156)
Weighted, Projected	498,926	6,002,103	19,946,295
<i>In rank order by Snowmobilers</i>			
Cottage/Cabin			
Cottage/cabin regular access	60.7%	32.1%	32.8%
Cottage/cabin in home province	52.5%	25.0%	27.9%
Cottage/cabin other province	12.2%	8.1%	4.8%
Cottage/cabin outside Canada	3.5%	3.4%	3.1%
Snowmobile	68.7%	7.3%	10.0%
All-terrain vehicle (ATV)	47.4%	11.3%	12.9%
Motor boat	37.2%	17.2%	17.0%
Motor home, camper, RV	27.8%	19.8%	15.3%
Canoe/kayak	27.2%	17.3%	15.4%
Sailboat	4.6%	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%
Swimming in lakes	9.3%	40.4%	8.8%	34.5%
Fishing - Fresh water	8.6%	19.6%	10.1%	20.5%
Lakeside/Riverside Resort	8.1%	26.6%	7.4%	22.1%
Private campground	7.3%	22.9%	6.5%	18.4%
Swimming in oceans	6.8%	33.0%	8.4%	28.2%
Motor Boating	4.1%	20.6%	3.9%	17.9%
All Terrain Vehicle Same Day	2.6%	7.9%	2.2%	7.6%
Snowmobiling - Day Use	1.5%	4.6%	2.0%	4.4%
Snowmobiling - Overnight	0.5%	0.7%	1.2%	1.7%

Source: TAMS Canadian Special Tabulations, prepared for Tourism British Columbia. **Activities shown here are those that are named by at least 1-in-3 Snowmobilers 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%
Sports				
Spectator Sports (Any)	15.3%	33.8%	13.4%	27.5%
Entertainment				
Amusement park	8.6%	23.7%	8.6%	21.3%
Casino	4.9%	26.9%	5.9%	25.6%
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%
Antiques	1.6%	28.3%	2.1%	23.5%
Food & Dining				
Dining – restaurants offering local ingredients and recipes	4.2%	65.1%	5.5%	57.1%
Dining - other high-end (not with international reputation)	2.6%	33.8%	2.8%	27.3%
Local outdoor cafes	2.4%	48.6%	2.8%	38.9%

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