



Wildlife Viewing Product Overview

BUILDING TOURISM WITH INSIGHT

WILDLIFE VIEWING

April 2009

This profile summarizes information on the wildlife viewing sector in British Columbia and contains a demographic and travel profile of travellers who participated in wildlife viewing activities while on a pleasure trip. Also included, is information on other outdoor and cultural activities participated in by wildlife viewing travellers, a discussion of recent trends within the sector, and information related to the economic impact of the wildlife viewing sector in general.

Information in this report has been compiled using various sources, including the 2006 Travel Activities and Motivations Study, summary data from the Commercial Marine-Based Tourism Study produced by the Cowichan/Ladysmith Marine Tourism Authority, the 2006 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation from the U.S. Fish and Wildlife Service, the 2006 Canadian Activity Profile: Wildlife Viewing While on Trips from the Canadian Tourism Commission, a report from the Washington Department of Fish and Wildlife and Washington Department of Community, Trade and Economic Development exploring wildlife viewing activities in Washington state, as well as information from a 1998 report produced by the Wildlife Branch, Ministry of Environment, Lands and Parks examining the economic value of wildlife activities in British Columbia.

Demographic Profile

DEMOGRAPHIC PROFILE OF WILDLIFE VIEWING PLEASURE TRAVELLERS

Pleasure travellers participating in the Travel Activities and Motivations Survey (TAMS) who have been to British Columbia in the past two years, were asked to indicate if they had participated in a wildlife viewing activity¹ while on a trip (in the past two years). Those who had participated in these activities were further asked if wildlife viewing activities had been a primary motivating factor for any of their trips.

- Among those wildlife viewing travellers from Canada and the US, the gender split was nearly equal, except among participating Canadians. Within this group of wildlife viewing travellers 55% were female and 45% were male (see Table 1).
- Canadian wildlife viewing travellers, on average, were younger than US wildlife viewing travellers. The largest group of Canadians were aged 18-34 (30% participated and motivated, respectively), with the largest groups of participating Americans were those aged 45-54, 55-64 and 65+ (each with 24% of the total). Among motivated American travellers, again, nearly one quarter (24%) fell into the each of the two oldest age groups (55 to 64 and 65 years and over).
- The majority of Canadian wildlife viewing travellers (59% participated; 58% motivated) and US wildlife viewing travellers (64% participated; 63% motivated) had annual household incomes over \$60,000. Among Americans, the income difference was even more pronounced with 40% of motivated wildlife viewing travellers reporting household incomes over \$100,000.
- Overall, US wildlife viewing travellers had completed a higher level of education than their Canadian counterparts. US wildlife viewing travellers were slightly more likely to have completed post-secondary education (69% each participated and motivated) compared to their Canadian counterparts (59% participated; 63% motivated).

¹ Wildlife viewing includes bird watching, whale or marine wildlife viewing, and viewing of land-based animals. Unless otherwise noted, information in this report is from the 2006 Travel Activities and Motivations Survey.

Table 1: Demographic profile of wildlife viewing travellers from Canada and the US who have been to BC

Demographics of Wildlife Travellers from Canada and the US who have been to BC	Canada		US	
	Participate	Motivate	Participate	Motivate
Adults 18+	1,553,129	310,768	3,021,793	973,627
Unweighted Numbers	2,141	402	943	297
Gender				
Male	45.4%	49.2%	49.5%	49.3%
Female	54.6%	50.8%	50.5%	50.7%
Age				
18-34	30.2%	29.6%	13.7%	12.2%
35-44	18.2%	10.6%	14.4%	13.3%
45-54	24.3%	29.2%	24.0%	21.9%
55-64	16.9%	19.9%	24.1%	23.5%
65+	10.4%	10.7%	23.8%	23.8%
Household Income				
Under \$40,000	14.4%	19.5%	11.5%	12.1%
\$40,000-\$59,999	15.9%	13.7%	13.0%	13.1%
\$60,000-\$99,999	27.1%	30.0%	26.4%	23.3%
\$100,000 or more	31.8%	28.0%	37.1%	40.1%
Not stated	10.8%	8.8%	12.1%	11.3%
Education				
Less than Secondary	5.8%	3.9%	1.0%	0.2%
Completed Secondary	21.5%	23.0%	7.2%	9.1%
Some Post Secondary	13.3%	10.1%	20.6%	18.1%
Completed Post Secondary	58.9%	63.0%	68.6%	69.0%
Other	n/a	n/a	0.6%	1.2%
Not stated	0.5%	0.1%	2.1%	2.2%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

Note: Cells with values displayed in red are based on small sample sizes (i.e. less than 50) and should be interpreted with caution.

DEMOGRAPHICS BY SPECIFIC WILDLIFE VIEWING ACTIVITY – CANADIAN PLEASURE TRAVELLERS WHO HAVE TRAVELLED TO BRITISH COLUMBIA

- Exploring gender among Canadian wildlife viewing travellers by specific activity showed that those who were primarily motivated by bird watching and land-based animal watching were slightly more likely to be male, whereas whale or marine viewing travellers were slightly more likely to be female (see Table 2).
- Looking across types of wildlife viewing activities, whale/marine mammal watchers tend to be slightly younger on average than bird and land-based animal viewing travellers. Of the three, motivated bird watching travellers, tend to be the oldest with over a third being 55 years or older with an additional 34.7% falling between 45 – 54 years of age. Conversely, nearly a third of whale/marine watching travellers are between the ages of 18 – 34 years and are less likely to be over the age of 45. Those who are motivated to watch land-based animals tend to be closer in age to whale/marine watching motivated Canadian travellers. Overall, Canadian motivated wildlife viewing travellers are more likely to be older than the typical Canadian pleasure traveller.
- Household incomes were fairly similar across wildlife viewing types.
- Whale or marine viewing travellers were the most likely to be highly educated, with 67% of respondents indicating that they had completed post secondary, compared to 48% of bird watchers and 56% of land-based animals travellers.

Table 2: Demographics by specific wildlife viewing activity types for travellers from Canada

Demographics of Canadian Travellers who have been to BC by Wildlife Viewing Type	All Canadian Travellers who Visited BC	Type of Wildlife Viewing (Motivated)		
		Bird Watching	Whale/Marine	Land Based Animals
Total	5,651,177	94,720	183,905	165,398
Unweighted Numbers	7,315	131	230	214
Gender				
Male	49.9%	55.7%	47.0%	54.8%
Female	50.1%	44.3%	53.0%	45.2%
Age				
18-34	31.4%	19.0%	31.6%	29.6%
35-44	18.8%	7.8%	10.9%	9.9%
45-54	21.3%	34.7%	27.4%	32.0%
55-64	14.9%	25.3%	21.2%	19.8%
65+	13.5%	13.3%	8.9%	8.7%
Household Income				
Under \$40,000	17.6%	16.3%	21.7%	22.0%
\$40,000-\$59,999	13.9%	16.0%	9.6%	13.5%
\$60,000-\$99,999	27.4%	31.4%	32.5%	25.6%
\$100,000 or more	29.1%	23.2%	30.0%	27.5%
Not stated	12.0%	13.1%	6.3%	11.4%
Education				
Less than Secondary	7.2%	6.4%	4.1%	3.4%
Completed Secondary	24.9%	37.2%	17.3%	28.7%
Some Post Secondary	12.0%	8.5%	11.6%	12.4%
Completed Post Secondary	55.1%	47.7%	66.9%	55.5%
Not stated	0.7%	0.2%	0.0%	0.1%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

Note: Cells with values displayed in red are based on small sample sizes (i.e. less than 50) and should be interpreted with caution.

DEMOGRAPHICS BY SPECIFIC WILDLIFE VIEWING ACTIVITY – AMERICAN PLEASURE TRAVELLERS WHO HAVE TRAVELLED TO BRITISH COLUMBIA

- Overall, there was little difference between American and Canadian wildlife viewing travellers when looking at gender. Likewise, trends in terms of gender of American travellers were similar to Canadians, with motivated birdwatchers and land-based animal viewers more likely to be male, and whale or marine viewers more likely to be female (see Table 3).
- Similar to Canadian travellers, bird watchers were more likely to be older; 80% were 45 or older, and nearly one quarter were 65 or older. Unlike Canadian travellers, whale or marine viewing travellers also tended to be older, with 74% age 45 or older, and 27% age 65 or older.
- As with Canadian travellers, household incomes were fairly similar across wildlife viewing types with those American travellers being motivated to watch either whale/marine mammals or land-based animals having similar income levels to the average American pleasure traveller.
- Motivated bird watching travellers reported the highest levels of education, with 77% having completed post secondary, compared to 66% of motivated whale or marine travellers and 68% of motivated land-based animal travellers.

Table 3: Demographics by specific wildlife viewing activity types for travellers from the United States

Demographics of US Travellers who have been to BC by Wildlife Viewing Type	All US Travellers who Visited BC	Type of Wildlife Viewing (Motivated)		
		Bird Watching	Whale/Marine	Land Based Mammals
Total	7,025,878	322,223	634,527	644,266
Unweighted Numbers	2,196	100	183	194
Gender				
Male	52.2%	55.5%	48.0%	52.9%
Female	47.8%	44.5%	52.0%	47.1%
Age				
18-34	21.5%	11.3%	11.3%	11.6%
35-44	13.6%	7.6%	14.6%	12.2%
45-54	21.9%	25.4%	23.8%	19.8%
55-64	19.7%	32.0%	23.4%	23.2%
65+	23.3%	23.8%	27.0%	33.1%
Household Income				
Under \$40,000	13.0%	16.2%	13.8%	12.6%
\$40,000-\$59,999	13.6%	6.7%	12.4%	16.1%
\$60,000-\$99,999	27.4%	24.4%	21.2%	25.0%
\$100,000 or more	34.5%	42.2%	42.2%	35.4%
Not stated	11.6%	10.6%	10.4%	10.9%
Education				
Less than Secondary	1.6%	0.8%	0.0%	0.0%
Completed Secondary	7.9%	7.0%	8.2%	11.2%
Some Post Secondary	23.4%	13.6%	21.4%	18.4%
Completed Post Secondary	64.7%	76.5%	65.9%	67.6%
Not stated	1.9%	1.2%	2.5%	1.8%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

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Travel Profile

TRAVEL BY CANADIAN AND US WILDLIFE VIEWING PLEASURE TRAVELLERS

- Of the estimated 5.6 million Canadian travellers who travelled within British Columbia in the past two years, over 1.5 million (27%) participated in a wildlife viewing activity while travelling. Approximately 310,000 (6%) stated that wildlife viewing was the primary reason for at least one overnight trip (see Table 4).
- US travellers were considerably more likely to include wildlife viewing activities while travelling. Of the estimated 7 million US travellers who visited British Columbia in the past two years, over 3.0 million (43%) participated in wildlife viewing activities while travelling and nearly one million (13%) indicated that wildlife viewing was the primary reason for at least one trip.
- The majority of all travellers, both from Canada and the US, indicated that they had taken more than five out-of-town pleasure trips over past two years. Both, travellers who participated, and those who were motivated by wildlife viewing were more likely to have taken five or more trips compared to all travellers to British Columbia. Overall, nearly three quarters of Canadian and US wildlife viewing travellers were classified frequent travellers.
- British Columbia was seen by the majority of travellers from both the US and Canada as a very appealing destination, with the majority rating the appeal of British Columbia an 8 or better on a 10-point scale. The overall Canadian traveller was more likely (88%) to give a higher appeal rating for British Columbia as compared to all US travellers (76%). The appeal ratings among wildlife viewing travellers were even higher than overall travellers from each country. Among participating wildlife viewing travellers from Canada, 90% provided a rating above 8 out of 10, while 92% of Canadian travellers who were motivated by wildlife viewing activities provided a high rating. Among US wildlife viewing travellers, 79% and 77% of participating and motivated travellers, respectively, provided high appeal ratings for BC.

- Canadian wildlife viewing travellers (both participated and motivated) were more likely to travel in summer compared to the overall traveller from Canada. Travel in winter, however, was higher among participating Canadian wildlife viewing travellers and lower among motivated wildlife viewing travellers. American wildlife viewing travellers (both participated and motivated) were more likely to also travel in winter compared to the overall traveller from the US. Travel in summer was higher among those who participated in wildlife viewing activities and identical among those who were motivated.

Table 4: Travel profile of Canadian and American wildlife viewing travellers

	Canada			US		
	All Travellers who Visited BC	Participate	Motivate	All Travellers who Visited BC	Participate	Motivate
Total	5,651,177	1,553,129	310,768	7,025,878	3,021,793	973,627
Unweighted Numbers	7,315	2,141	402	2,196	943	297
Total number of out-of-town pleasure trips taken in past two years						
One	6.9%	2.3%	2.1%	3.3%	1.8%	1.1%
Two	11.8%	6.9%	5.6%	8.7%	7.0%	6.0%
Three	11.9%	9.4%	8.2%	9.5%	9.0%	7.7%
Four	11.5%	9.4%	10.7%	11.7%	10.5%	10.7%
Five Or More	57.9%	72.0%	73.4%	65.4%	70.6%	72.7%
Not Stated	0.0%	0.0%	0.0%	1.3%	1.1%	1.7%
Appeal of British Columbia – Rated on a scale of 1 to 10						
8 to 10	87.5%	90.3%	91.6%	75.7%	78.7%	76.8%
4 to 7	9.6%	7.6%	6.2%	18.2%	16.0%	17.4%
1 to 3	1.1%	0.7%	1.4%	2.6%	2.4%	2.5%
Don't Know	0.6%	0.5%	0.1%	2.2%	1.7%	1.3%
Not Stated	1.2%	1.0%	0.7%	1.2%	1.2%	2.0%
Season travelled						
Summer	89.9%	93.0%	94.3%	87.7%	89.1%	87.7%
Winter	71.0%	77.9%	68.1%	77.4%	80.8%	86.3%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one of more nights.

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OTHER DESTINATIONS VISITED

- Among participating Canadian wildlife viewing travellers who visited British Columbia, other popular destinations included Alberta and the US with over two thirds making trips to these locations (69% & 65% respectively). Similar destinations were also popular among motivated Canadian wildlife travellers who visited BC, however, they were more likely to have travelled to a US destination (71%) compared to the participating Wildlife viewing traveller from Canada.
- Of the 30.6 million US wildlife viewing travellers, 10% had made at least one trip to British Columbia in the past two years. The percentage of motivated US wildlife viewing travellers who had visited BC was slightly higher, at 13%.

OTHER ACTIVITIES (OUTDOOR AND CULTURAL) PARTICIPATED IN

- For the most part, other outdoor and cultural activities participated in were similar for British Columbian, Canadian and US wildlife viewing travellers. Strolling a city to view buildings was a popular activity for both participated and motivated wildlife viewing travellers from all origins and was ranked as the top other activity for all groups with the exceptions of motivated travellers both from BC and from the US (see Table 5).
- Motivated travellers from British Columbia were most likely to have visited a national or provincial park, while motivated travellers from the US were most likely to have visited a natural wonder as part of a trip taken in the past two years. Although, visiting a national or provincial park was still a popular activity among other wildlife viewing

travellers from the US. A total of 67% of motivated US travellers and 66% of participating US travellers included a visit to a park on a trip they had taken in the past two years.

- American wildlife viewing travellers were the least likely to include swimming in lakes in their travel (24% participated and 27% motivated). Swimming in lakes had considerably higher incidence level across all Canadian and BC wildlife viewing travellers.

Table 5: Other outdoor and cultural activities participated in by wildlife viewing travellers

Activities	BC		Canada		US	
	Participate	Motivate	Participate	Motivate	Participate	Motivate
City stroll	66.0%	49.1%	68.3%	65.4%	67.6%	68.3%
Visiting national or provincial park	64.2%	53.8%	67.3%	60.9%	65.7%	66.9%
Sunbathing	59.1%	39.8%	59.9%	51.6%	43.3%	47.7%
Historic site/buildings	55.1%	52.8%	57.5%	61.9%	61.6%	66.6%
Hiking - Same day excursion	55.7%	41.0%	55.7%	55.1%	48.4%	41.2%
Swimming in lakes	58.4%	44.7%	53.8%	44.8%	23.6%	26.5%
Natural wonders	44.5%	51.9%	51.7%	54.2%	63.7%	71.2%
Other historic sites/buildings	51.4%	52.7%	47.0%	47.1%	56.5%	63.4%
Swimming in oceans	48.3%	35.5%	46.1%	43.0%	39.8%	42.4%
Museum - History/heritage	43.0%	53.2%	44.5%	48.2%	50.8%	54.6%
Farmers' market	46.4%	46.5%	40.4%	43.6%	44.0%	48.5%
Wildflowers / Flora viewing	38.1%	40.5%	38.6%	39.9%	43.7%	44.7%
Botanical gardens	30.8%	41.0%	33.1%	36.4%	44.0%	47.2%
Zoos	26.6%	47.8%	28.6%	36.4%	37.9%	46.2%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

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Trends Within the Wildlife Viewing Sector

- Canada's share of the outdoor adventure market, in which wildlife viewing is situated, is expected to increase by 7.8% for American travellers and 5.0% for Canadian travellers between 2000 and 2025. Outdoor adventure attracts younger North Americans, and as the US and Canadian populations age, the market for outdoor adventure tourism may decline unless operators are able to accommodate older travellers.²
- Bird watching and whale watching are particularly popular activities. In 2006, approximately 4.7 million Americans observed birds around home (58%) and on trips (42%); away-from-home travellers averaged 14 days away on bird-watching excursions.³ A 2001 Canadian study showed that whale watching was one of the five most popular outdoor activities in demand by tour buyers.⁴
- About one-fifth of away-from-home wildlife viewers are under the age of 35 (21%); another 68% are between the ages of 35 and 64, and travellers over the age of 65 comprise 11%. Wildlife viewers are nearly equally split between genders (49% female, 51% male) and 20% have an income between \$50,000 and \$75,999.⁵
- Observing and photographing wildlife were the most popular activities for away-from-home wildlife viewers⁶. Wildlife viewers most frequently stayed in campgrounds (40%) and consulted a variety of information sources, including guidebooks and the internet, in making travel plans⁷.

² 2005 Commercial Marine-Based Tourism Study Report, Cowichan/Ladysmith Marine Tourism Authority available at <http://marine.cowichan.net/pdf/Final%20report%20March%2031.pdf>

³ 2006 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, U.S. Fish and Wildlife Service available at <http://www.census.gov/prod/www/abs/fishing.html>

⁴ 2001 Rendez Vous Canadian Buyers Survey, as reported (2) above

⁵ See (3) above

⁶ See (3) previous page.

⁷ 2006 Canadian Activity Profile: Wildlife Viewing While on Trips, Canadian Tourism Commission available at http://www.corporate.canada.travel/en/ca/research_statistics/productknowledge/tams/reports/CDN_Wildlife_Viewing.html

- The health of various wildlife populations (e.g. herons, orcas) has focused public attention on them, increasing interest in these populations but also increasing pressure on the resource⁸.

Economic Impact of Wildlife Viewing

- Wildlife viewers in the United States spent over \$45 billion on their activities in 2006, including both around-home and away-from-home viewing; an average of \$816 per spender⁹ (see Table 6).
- Equipment purchases were the most significant expense for wildlife viewers, comprising 51% of all dollars spent in 2006; travel-related expenses made up 28% of all expenses.

Table 6: Wildlife viewing expenditures by category

Item	Amount (Billions)	Percent of Total Expenditures
Trips		
Food and Lodging	\$7.5	16%
Transportation	\$4.5	10%
Other (e.g. land use fees, equipment rental)	\$0.9	2%
Equipment Purchases		
Wildlife watching equipment (e.g. binoculars, cameras)	\$9.9	22%
Auxiliary equipment (e.g. tents and backpacking equipment)	\$1.0	2%
Special equipment (e.g. off-road vehicles, campers, boats)	\$12.3	27%
Land Use and Other Expenses		
Land leasing and owning	\$6.6	14%
Plantings for the benefit of wildlife	\$1.6	3%
Membership dues and contributions	\$1.1	2%
Magazines and books	\$0.4	1%
Total	\$45.8	100%

Source: 2006 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, U.S. Fish and Wildlife Service

- Wildlife viewing expenditures in the United States increased 21% from 1996-2006; from 2001-2006 the main reason for this increase was larger expenditures on trip-related expenses¹⁰.
- The global whale watching industry earned approximately \$1 billion in 1998; 29% of earnings came from direct whale watching tours, an aspect of the industry experiencing a growth rate of 21.4%.¹¹
- A 2004 U.S. survey estimated that Washington State residents spent \$979 million on fishing, hunting, and wildlife viewing, resulting in a total economic output of 1.78 billion and generating or maintaining approximately 22,000 jobs.¹²
- British Columbia specific figures indicate that wildlife viewers spent \$6.2 billion on wildlife viewing activities in BC in 1996; 63% of that spending was on direct wildlife viewing, defined as trips away from home where the main purpose is to watch, feed, photograph or study wildlife. Annual spending for direct wildlife viewing in BC was \$454 per participant¹³.

Overview of the British Columbia Wildlife Viewing Tourism Sector

WILDLIFE VIEWING IN BRITISH COLUMBIA

⁸ See (2) previous page.

⁹ See (3) previous page.

¹⁰ See (3) previous page.

¹¹ See (2) previous page.

¹² 2004 Wildlife Viewing Activities in Washington: A Strategic Plan. Report to the Washington State Legislature, Washington Department of Fish and Wildlife and Washington Department of Community, Trade and Economic Development available at http://wdfw.wa.gov/viewing/viewing_plan/index.htm

¹³ 1998 Economic Value of Wildlife Activities in British Columbia, Wildlife Branch, Ministry of Environment, Lands and Parks. Roger Reid

- Approximately 4.8 million people reported viewing wildlife in British Columbia in 1996¹⁴; most commonly, people viewed wildlife residentially (i.e. around their home or cabin; 47% of respondents).
- Direct wildlife viewing was undertaken by 18% of respondents; the remaining 35% of respondents viewed wildlife indirectly, while on a trip for another purpose.
- The average number of days that respondents participated in wildlife viewing ranged from 15.6 in Vancouver Coast and Mountains to 33.2 in Kootenay Rockies for direct wildlife viewing and from 21.5 in the Thompson-Nicola area to 50.2 in the Vancouver Island region for indirect viewing (see Table 7).

Table 7: Days of indirect and direct participation in wildlife activities by location

Location		Indirect		Direct	
Region	Specific area	Days (000)	Average Days per Participant	Days (000)	Average Days per Participant
Vancouver Island	Vancouver Island	15,727	50.2	5,058	27.5
Vancouver, Coast, and Mountains	Lower Mainland	41,938	43.7	7,198	15.6
Thompson Okanagan	Thompson-Nicola	2,279	21.5	821	21.5
Thompson Okanagan	Okanagan	4,881	37.3	1,624	23.6
Kootenay Rockies	Kootenay	3,086	49.8	1,258	33.2
Cariboo Chilcotin	Cariboo	1,480	44.5	442	27.3
Northern British Columbia	Skeena	1,703	37.6	703	29.4
Northern British Columbia	Omineca-Peace	2,881	38.1	725	22.1
British Columbia		73,974		17,829	

Source: Roger Reid. 1998. Economic Value of Wildlife Activities in British Columbia, 1996.

Wildlife Branch, Ministry of Environment, Lands and Parks. Ministry of Environment regions have been matched to Tourism British Columbia regions; data was updated in 2001.

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¹⁴ See (13) above