



RESEARCH SERVICES

Travel Activities and Motivations of U.S. Visitors to BC: Activity Profile

Focus on Divers & Snorkellers

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



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.

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The Ontario Ministry of Tourism	The Quebec Ministry of Tourism
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The Canadian Tourism Commission	Tourism Saskatchewan
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Alex Athanassakos of the Ontario Ministry of Tourism served as the project manager for the TAMS partnership.

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I. Executive Summary

OVER TWENTY MILLION AMERICAN TOURISTS GO SCUBA DIVING AND, MORE COMMONLY, SNORKELLING WHILE ON TRIPS.

Of the 20.3 million American adults who have taken overnight pleasure trips in the past two years and claim to go scuba diving or snorkelling while on vacation, most were snorkelling in seas or oceans (17.7 million). Just over five million engaged in scuba diving in ocean waters. Scuba diving in lakes or rivers as a holiday activity is much less common (894,000 American tourists).

THE DIVERS AND SNORKELLERS SECTOR IS A NICHE MARKET FOR BRITISH COLUMBIA.

Divers and Snorkellers, as defined in this report, represent a subset of the 20.3 million Americans who went scuba diving or snorkelling on trips. They are overnight pleasure travellers who say they recently took a trip *in order to* engage in these activities. Those for whom diving or snorkelling was the *main reason* for a trip constitute about one-quarter of *all* American tourists who engage in these activities as *one-of-many* things they see and do while travelling. Thus, the Divers and Snorkellers market segment represents approximately 5.4 million Americans, or about three percent of the U.S. pleasure travelling public and seven percent of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so.

MOST MEMBERS OF THE MARKET SECTOR ARE SNORKELLERS RATHER THAN DIVERS.

Consistent with those who engage in *any* diving or snorkelling, many more members of the market sector that take trips in order to engage in these activities are *snorkellers* (73%) rather than *divers* (35%) in seas or oceans.

BRITISH COLUMBIA ATTRACTS DIVERS AND SNORKELLERS AT A HIGHER THAN AVERAGE RATE.

While a niche market, Divers and Snorkellers are twice as likely to have travelled to British Columbia recently (7%) as are Americans in the overnight pleasure travel market as a whole (3%).

DIVERS AND SNORKELLERS LIVE IN JUST ABOUT EVERY U.S. STATE.

For the most part, they mirror the distribution of the U.S. adult population and those who have taken overnight pleasure trips to any destination in the past two years. Not surprisingly, however, these underwater explorers are concentrated in states where opportunities to participate in the sport are most prevalent – states with ocean frontage and warm climates. For example, almost one-fifth of them live in California (17%) and somewhat more live in the South Atlantic states (21%), including 1-in-10 who reside in Florida.

DIVERS AND SNORKELLERS ARE CONCENTRATED IN THE MID-FORTIES TO MID-FIFTIES AGE GROUP.

While every age group is represented among American Divers and Snorkellers, they tend to be middle-aged. Nonetheless, about 1-in-10 are young adults (18 to 24 years), over one-fifth are in their mid-twenties to mid-thirties and somewhat fewer are in their mid-thirties to mid-forties (17%). Divers and Snorkellers are, however, most highly concentrated in the mid-forties to mid-fifties age group (30%). Older American tourists – those 65 years of age or more – tend *not* to be Divers and Snorkellers. Only about one-twentieth of these underwater enthusiasts (6%) are 65 or older. Men (53%) are somewhat more likely to be Divers and Snorkellers than are women (47%).

Consistent with their ages, American Divers and Snorkellers are parents (49%) or, less commonly, a partner in a couple (36%). They live in households of about three people, on average.

THEY SPAN EDUCATION AND INCOME SPECTRUMS.

Divers and Snorkellers represent a broad range of incomes, reflecting, in part their wide age distribution – some are at the early stages of working years whereas others are at their career and earning peaks. One-half are university educated, three-quarters are actively engaged in the labour force and over one-third live in households with at least one person occupying an executive, managerial or professional position.

Tourists in this niche market tend to be more highly educated, more apt to occupy professional or managerial positions and to be more affluent than are typical American pleasure tourists. They more closely resemble the *typical* U.S. tourist to British Columbia in terms of education and income. Because they are younger than the typical U.S. tourist to British Columbia, however, Divers and Snorkellers are more apt to be engaged in the labour force. In contrast, they are much less apt to be retired than are British Columbia's visitors from the U.S. as a whole.

ONE-FIFTH OF AMERICAN DIVERS AND SNORKELLERS HAVE BEEN TO CANADA ON A RECENT OVERNIGHT PLEASURE TRIP.

Canada emerges as a particularly attractive destination for underwater explorers. It attracts over one-fifth of all Americans in this sector, compared to only about 1-in-8 *typical* U.S. pleasure tourists with recent pleasure trips to Canada.

MEXICO AND THE CARIBBEAN ATTRACT MORE DIVERS AND SNORKELLERS THAN DOES CANADA.

While relatively successful in attracting Divers and Snorkellers vis à vis the general travelling public in the U.S., Canada trails other foreign destinations in this regard. Perhaps because of the warm waters off their coasts, destinations such as Mexico and the Caribbean attract almost twice as many Divers and Snorkellers as does Canada.

ONTARIO IS BRITISH COLUMBIA'S PRINCIPLE CANADIAN COMPETITOR.

Over a two-year period, **Ontario** attracted more Divers and Snorkellers (11%) than did British Columbia (7%) but **sun/sea U.S. destinations** are much more popular than any Canadian destination.

Collectively, sun/sea destinations within the U.S. attract three-quarters of Divers and Snorkellers for overnight pleasure trips. On a state-by-state basis, Florida, California, Nevada and Hawaii and are the most popular U.S. destinations for Divers and Snorkellers when travelling outside their home state. As such, these states represent stiff competition for British Columbia's diving and snorkelling businesses.

A SAFE DESTINATION IS A PRIORITY.

Most Divers and Snorkellers start a trip planning process with a *destination* in mind although about one-fifth of these tourists start their trip planning process with a focus on **activities** or begin with the **type of vacation experience** they wish to have. The level of activity-driven planning is appreciably higher than is the case among typical U.S. tourists to British Columbia or in the American travel market as a whole. The destination should be *safe*, one that has *many things for adults to see and do*, poses *no health concerns*, has *mid-range lodging*, offers *direct air access*, provides *information on the internet* and *convenient access by car*.

DIVERS AND SNORKELLERS FOCUS ON “THEIR” SPORT.

There is relatively little overlap between Divers and Snorkellers and other sectors of interest to tourism businesses in British Columbia.² For example, only about 3-in-10 of them are **History/Heritage Tourists** and about one-fifth are **Alpine Skiers, Hikers, Campers/RVers** and/or **Self-Guided Overnight Touring Travellers**.

NOT SURPRISINGLY, DIVERS AND SNORKELLERS ARE ESPECIALLY INTERESTED IN WATER BASED TRAVEL EXPERIENCES.

As their predisposition to snorkel, scuba dive and go to sun/sea destinations might suggest, these tourists are especially interested in **water based travel experiences**. Specifically, about half of them take trips *in order to* sunbathe or sit on a beach and two-fifths take trips in order to swim in oceans. Three-quarters of Divers and Snorkellers have participated in these activities on a recent overnight pleasure trip even though the activities may not have been the reason they took the trip. Their interest in seaside resorts may also be associated with their desire to have sun/sea tourism experiences.

Their **land-based outdoor** interests include going to national or state/provincial nature parks where they might be found camping, taking day hikes, seeing well-known natural wonders and/or viewing the flora and fauna.

PARTICIPATION RATES ARE HIGHER THAN ARE MOTIVATION RATES FOR MANY TRIP ACTIVITIES.

Entertainment-oriented activities in general, and particularly theme parks, casinos, and spectator sports events such as professional baseball or football games are trip motivators for sizeable minorities of Divers and Snorkellers. By and large, however, these tourists 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 their trips.

For example, almost half have strolled around a city to observe its buildings and architecture on a recent pleasure trip but only about 1-in-6 have taken a trip in order to do so. Similar patterns are evident for seeing well-known historic sites and going to general history museums. Divers and Snorkellers are about three

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

times as likely to go to general history and/or science and technology museums and twice as inclined to attend a cultural performance such as music concerts or live theatre *as one of their trip activities* as they are to make these attractions the driving force behind the trip.

For entertainment, these underwater explorers are especially drawn by amusement parks and, to a lesser extent, by casinos. Going to an aquarium is also relatively widespread among Divers and Snorkellers, followed by zoos and movies. Like movies, food and wine activities and shopping are much more likely to be *one of many* trip activities than a *reason* for taking a trip.

THE INTERNET TOPS THE CHART AS A TRIP PLANNING TOOL.

Over 8-in-10 of these tourists rely on the internet for travel information and about 5-in-10 use anecdotal information provided by **friends and relatives** and their own **past experience**. About one-third rely on **travel agents, newspapers** and/or **maps** to obtain travel information. In the main, these are the same sources of information that may be influencing American pleasure travellers who have recently done so to take trips to British Columbia.

DIVERS AND SNORKELLERS DO NOT HAVE AN ESPECIALLY FAVOURABLE IMPRESSION OF BRITISH COLUMBIA.

British Columbia achieves a moderately favourable rating (6.8) for overall appeal as a pleasure travel destination. This score is well below the ratings achieved by Hawaii (9.0), California (7.9), Florida (7.8) and Colorado (7.4) but about on par with those accorded Arizona (6.9) and New York State (6.8). British Columbia is also the highest rated *Canadian* destination, enjoying a significantly more favourable rating than the closest Canadian runner-ups: Ontario (6.2), PEI (6.1) and Quebec (6.1).

Despite British Columbia's moderate success among those offering an appraisal of its appeal, about one-quarter of U.S. Divers and Snorkellers refrain from rating the province, presumably because they know too little about the destination to offer an opinion about its touristic appeal.

WATER TEMPERATURE MAY POSE A CHALLENGE FOR ATTRACTING U.S. DIVERS AND SNORKELLERS TO BRITISH COLUMBIA.

With their particular constellation of outdoor interests and, for many of them, geographic proximity to British Columbia, U.S. Divers and Snorkellers might seem to be an ideal market for the province. At present, however, the province is attracting only about seven percent of this market – a rate well below that achieved by destinations that offer warmer waters for underwater exploration and particularly for snorkelling – Florida, California, Hawaii, the Caribbean, and Mexico.

To attract more American divers and snorkellers, it may be necessary for British Columbia's businesses to target the portion of the larger market that would be challenged by diving in colder waters and to make these potential tourists aware of the unique diving opportunities the province has to offer.

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II. Introduction

A. Background and Objectives

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 Americans 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 American tourist profiles based on the recently released 2006 Travel Activities and Motivation Survey (TAMS).³

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

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

Tourism British Columbia (TBC) commissioned Research Resolutions & Consulting Ltd. to prepare the American tourist profiles. This profile describes **Divers and Snorkellers**. Additional profiles will be issued over the coming months.

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

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

B. The American Divers and Snorkellers Report

This profile provides information about **American Divers and Snorkellers**. For purposes of this report, these are American adults (18 years of age or over) who claim to have taken an overnight pleasure trip to any destination in the past two years and indicate that *scuba diving or snorkelling in lakes, rivers or oceans* was the main reason for at least one of the overnight trips they took over this same time period.⁵

People who take a trip *in order to* engage in scuba diving or snorkelling are only a fraction of tourists who participate in these underwater activities while on their vacations. In fact, over twenty million Americans say they have had a diving or snorkelling experience on at least one of their trips over a two-year period. Of these 20.3 million American pleasure tourists, 5.4 million (27%) say they took a trip *in order to* snorkel or scuba dive in lakes or oceans. These underwater enthusiasts – those for whom the activity is the main reason for a trip – are the focus of this report because as the “dedicated” or “hard core” market, they represent a crystallization of the interests and characteristics that might attract more casual participants to the activity.

Note to Readers

Activities and locations visited are independent of one another.

In other words, American Divers and Snorkellers claim to have taken an overnight trip motivated by diving or snorkelling 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, Divers and Snorkellers may or may not have been engaged in these activities in a particular country, province or state they have visited recently for an overnight pleasure trip.

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

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

III. Overview of U.S. Tourism Activity Sectors

A. The U.S. Pleasure Travel Market to British Columbia

Tourism businesses in British Columbia are competing for the attention of about 166.0 million American 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-quarters of the 222.8 million adults who live in the U.S.A.

Close to one-tenth of the American overnight pleasure travel market, or about 15.4 million tourists, have had *some* experience with British Columbia over the past decade (9%).⁷ They may have been on a vacation, visiting friends and relatives or on a business trip to the province. Of these overnight travellers who took trips for any reason, close to half claim to have visited British Columbia in the past two years or so (45% or 6.9 million).

TABLE A: OVERVIEW OF BRITISH COLUMBIA’S MARKET SIZE	Recent U.S. Pleasure Travellers Any Destination	
Unweighted base	(45,697)	
Weighted, Projected	166,003,000	
<u>Overnight Trips to British Columbia</u>		
Any purpose, past 10 years	15,377,000	9%
Any purpose, past 2 years	6,933,000	4%
Pleasure, past 2 years	5,340,000	3%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, page 47.

Most of these recent U.S. visitors to the province – 5.3 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 166.0 million American overnight pleasure travellers, they have attracted 1-in-33 (3%) of these tourists to the province over a two-year period.

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.

The profiles of various activity-based sectors⁸ described in this report are based on Americans who have taken a recent overnight pleasure trip to *any destination* (166.0 million) and, where feasible, on the subset of these tourists who have been to British Columbia over the two-year period (5.3 million).⁹

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 Size

Several outdoor-oriented tourism segments of importance to British Columbia represent relatively small *niche* markets, both within the overall U.S. pleasure travel market and among those who have recent tourism experience in British Columbia.¹⁰ Examples of these niche markets include **River Rafter**s, **Sea Kayakers**, **Snowmobilers** and **Nordic Skiers**. Each of these sectors represents approximately 1-in-100 U.S. overnight pleasure travellers [see Table B].

Trips driven by **cycling** or staying in **wilderness or remote lodges** are slightly more common, representing about 1-in-50 U.S. overnight pleasure tourists. **Golfers** represent 1-in-25 pleasure tourists while **Hikers** and **Alpine Skiers** represent just over 1-in-20 (each). Approximately 1-in-12 are **Anglers**.

TABLE B: OVERVIEW OF SELECTED SECTOR MARKET SIZE ¹	U.S. Overnight Pleasure Travellers To . . . In Past 2 Years				
	Any Destination		British Columbia		
Unweighted base	(45,697)		(1,706)		
Weighted, Projected	166,003,000		5,340,000		
<i>In Rank Order by Tourists to British Columbia</i>					Index
Self-Guided Overnight Touring Travellers	17,550,000	11%	1,370,000	26%	236
History and Heritage Tourists	23,218,000	14%	1,180,000	22%	157
Campers/RVers	17,426,000	11%	833,000	16%	145
Alpine Skiers	9,637,000	6%	689,000	13%	217
Hikers	9,704,000	6%	607,000	11%	183
Anglers	12,380,000	8%	598,000	11%	138
Aboriginal Activity Tourists	4,442,000	3%	454,000	9%	300
Divers & Snorkellers	5,410,000	3%	360,000	7%	233
Golfers	5,890,000	4%	352,000	7%	175
Cyclists/Mountain Bikers	2,914,000	2%	305,000	6%	300
Nordic Skiers	1,567,000	1%	265,000	5%	500
Backcountry Lodge Guests	2,873,000	2%	224,000	4%	200
River Rafters	2,406,000	1%	157,000	3%	300
Snowmobilers	1,712,000	1%	101,000	2%	200
Sea Kayakers	575,000	*	77,000	1%	333

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 1, page 1. *Less than 0.5%. 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.

¹⁰ 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** are more widespread, representing more than 1-in-10 U.S. overnight pleasure tourists and considerably higher proportions of those who have recently visited British Columbia.

An index that compares the proportion of *all* American 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 U.S. 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 Americans in **each** sector at an appreciably higher rate than they occur in the U.S. travelling public. Sectors over-represented at **three or more times** the expected rate include:

- Nordic Skiers
- Sea Kayakers
- Aboriginal Activity Tourists
- Cyclists/Mountain Bikers
- River Rafters

Other activity-based tourists who come to British Columbia at about **twice** the expected rate based on their incidence in the U.S. pleasure travel market include:

- Self-Guided Overnight Touring Travellers
- Divers & Snorkellers
- Alpine Skiers
- Backcountry Lodge Guests
- Snowmobilers

The remaining sectors are also over-represented among recent U.S. tourists to British Columbia, but not to the extent of those described above:

- Hikers
- Anglers
- Golfers
- Campers/RVers
- Heritage and History Tourists.

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 the same 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 the **Aboriginal Activity** sector are at least half the members *also* members of another key sector: History and Heritage Tourists (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%+		History/ Heritage					
30% - 49%						Hikers	Alpine Skiers
						Alpine Skiers	Campers/ RVers
						History/ Heritage	
						Self-Guided Touring	
20% - 29%	Self-Guided Touring	Campers/ RVers	History/ Heritage	History/ Heritage	Campers/ RVers	Campers/ RVers	Anglers
	Campers/ RVers	Self- Guided Touring		Hikers	History/ Heritage	Cyclists	History/ Heritage
		Hikers				Anglers	

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

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 (20% to 29%) 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								
At least 20% Duplication								
Level of Duplication	RIVER RAFTERS	SEA KAYAKERS	BACK- COUNTRY LODGES	CYCLISTS	HIKERS	DIVERS/ SNORKEL- LERS	GOLFERS	ANGLERS
50%+								
30% - 49%	Campers/ RVers	Divers & Snorkellers	Campers/ RVers	Hikers	Campers/ RVers			
	Alpine Skiers	Hikers	History/ Heritage	History/ Heritage	History/ Heritage			
		Campers/ RVers	Anglers	Campers/ RVers				
		Self-Guided Touring						
20% - 29%	History/ Heritage	Alpine Skiers	Self-Guided Touring	Alpine Skiers	Self- Guided Touring	History/ Heritage	History/ Heritage	Campers/ RVers
	Self- Guided Touring	History/ Heritage	Hikers	Self- Guided Touring		Alpine Skiers		History/ Heritage
	Hikers	Anglers		Anglers		Campers/ RVers		
	Anglers							

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

IV. Divers and Snorkellers Market Profile

A. Regional and Demographic Characteristics

1. Place of Residence

At over five million, Divers and Snorkellers – American adults who take vacations *in order to go scuba diving or snorkelling in lakes, rivers or oceans* – are a niche market. They represent 1-in-33 American overnight pleasure travellers to *any destination* and 1-in-14 of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so.

Most members of this tourism sector are *snorkellers* rather than *scuba divers* and most engage in these underwater activities in *seas or oceans* rather than *lakes/rivers*. Snorkellers in seas or oceans represent almost 3-in-4 American tourists in this market segment whereas about 1-in-3 take trips in order to go scuba diving in seas or oceans.

Snorkelling	
In seas/oceans	73%
In lakes/rivers	7%
Scuba diving	
In seas/oceans	35%
In lakes/rivers	7%

Table 1 provides the place of residence by U.S. Census Regions and for individual states that emerge as noteworthy for Divers and Snorkellers. For a list of the states in each of the U.S. Census Regions, please refer to the appendix.

These underwater enthusiasts live in just about every one of the fifty states. Not surprisingly, are apt to reside in states where opportunities to participate in the sport are most prevalent – states with ocean frontage and warm climates.

- The **Pacific** states are home to over 1-in-5 Divers and Snorkellers. Most of these coastal residents live in California (17%).
- A further one-fifth of this sector's members live in the **South Atlantic** states, with about 1-in-10 residing in Florida.
- One-tenth reside in the **West South Central** region (10%), led by the region's most populated state and the one with ocean/gulf frontage – Texas (8%).

TABLE 1: PLACE OF RESIDENCE	Divers & Snorkellers	All U.S. Pleasure Tourists		U.S. Population
	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(1,478)	(1,706)	(45,697)	(60,649)
Weighted, Projected	5,410,000	5,340,000	166,003,000	222,846,000
Incidence of Divers & Snorkellers	100%	7%	3%	3%
New England	5%	3%	5%	5%
Middle Atlantic	13%	6%	14%	14%
New York	6%	3%	6%	7%
East North Central	14%	9%	16%	16%
Illinois	5%	3%	4%	4%
West North Central	5%	5%	7%	7%
South Atlantic	21%	11%	19%	19%
Florida	9%	5%	6%	6%
East South Central	4%	2%	6%	6%
West South Central	10%	6%	11%	11%
Texas	8%	5%	7%	8%
Mountain	8%	7%	7%	7%
Pacific	21%	50%	16%	16%
Washington	3%	20%	2%	2%
Oregon	1%	6%	1%	1%
California	17%	24%	13%	12%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 42. "All U.S. Pleasure Tourists" are Americans 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 U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. *Less than 1%.

2. Personal and Household Characteristics

Age & Gender

About 1-in-10 American Divers and Snorkellers are young adults (18 to 24 years), over one-fifth are in their mid-twenties to mid-thirties and somewhat fewer are in their mid-thirties to mid-forties (17%). Divers and Snorkellers are, however, most highly concentrated in the mid-forties to mid-fifties age group (30%). Approximately one-fifth are 55 years of age or older (see Table 2).

Divers and Snorkellers' age distribution differs from the age profile of *all* American tourists in two respects: Divers and Snorkellers are more heavily concentrated in the 45 to 54 year age group and are less apt to be 65 years or older than is the *typical* American traveller. Divers and Snorkellers also differ substantively from typical U.S. visitors to British Columbia, particularly at the older end of the age spectrum. Specifically, one-quarter of the Americans who have recently taken an overnight pleasure trip to the province are 65 years of age or over but only about one-twentieth of these underwater enthusiasts (6%) are in this older age group.

Men (53%) are somewhat more likely to be Divers and Snorkellers than are women (47%), with men who are 35 to 54 years of age representing about one-quarter of the market and women in this same age group also representing about one-quarter.

TABLE 2: AGE & GENDER	Divers & Snorkellers	All U.S. Pleasure Tourists		U.S. Population
	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(1,478)	(1,706)	(45,697)	(60,649)
Weighted, Projected	5,410,000	5,340,000	166,003,000	222,846,000
Age				
18 – 24 Years	11%	6%	11%	11%
25 – 34 Years	22%	15%	21%	20%
35 – 44 Years	17%	14%	17%	16%
45 – 54 Years	30%	21%	21%	21%
55 – 64 Years	13%	21%	16%	16%
65+ Years	6%	24%	14%	17%
Gender				
Men				
18 – 34 Years	53%	53%	49%	48%
35 – 54 Years	18%	11%	16%	16%
	24%	20%	18%	18%
Women				
18 – 34 Years	47%	47%	52%	52%
35 – 54 Years	16%	10%	16%	15%
	23%	16%	20%	19%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 38. "All U.S. Pleasure Tourists" are Americans 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 U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

Race, Education, Occupation, and Income

Almost all American Divers and Snorkellers, like tourists who live in the U.S. as a whole, are white. One-half are university educated, three-quarters are actively engaged in the labour force and over one-third live in households with at least one person occupying an executive, managerial or professional position (see Table 3).

Divers and Snorkellers represent a broad range of incomes, reflecting, in part their wide age distribution – some are at the early stages of working years whereas others are at their career and earning peaks. One-quarter of Divers and Snorkellers have household incomes under \$60,000 (25%), one-third are in the \$60,000 to under \$100,000 bracket (34%) and two-fifths fall into the more affluent \$100,000+ bracket (42%).

TABLE 3: RACE, EDUCATION, OCCUPATION, INCOME	Divers & Snorkellers	All U.S. Pleasure Tourists		U.S. Population
	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(1,478)	(1,706)	(45,697)	(60,649)
Weighted, Projected	5,410,000	5,340,000	166,003,000	222,846,000
Race				
White	88%	87%	86%	84%
African American	2%	2%	6%	7%
Asian American	3%	4%	2%	2%
Other/Not stated	7%	7%	6%	7%
Education				
High school diploma or less	11%	9%	20%	26%
Some post-secondary	27%	23%	29%	29%
Post-secondary diploma or certificate	9%	9%	10%	10%
University degree+	51%	56%	39%	33%
Labour Force Participant¹	75%	62%	66%	61%
Retirees	7%	26%	15%	16%
Executive/Manager /Professional²	37%	32%	30%	26%
Household Income³				
Under \$40,000	14%	14%	27%	36%
\$40,000 - \$59,999	11%	16%	19%	18%
\$60,000 - \$99,999	34%	31%	30%	26%
\$100,000 - \$149,999	24%	22%	16%	12%
\$100,000+	42%	39%	24%	20%
\$150,000+	18%	17%	8%	6%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, pages 34, 35, 36, 37.

¹ Labour force participant includes working full time, part time and self-employed. ² Male or female head of household. ³ Note: 2005 household incomes have been re-percentage on total stating an income (US\$). "All U.S. Pleasure Tourists" are Americans 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 U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. *Less than 0.5%.

Tourists in this niche market tend to be more highly educated, more apt to occupy professional or managerial positions and to be more affluent than are typical American pleasure tourists. They more closely resemble the *typical* U.S. tourist to British Columbia in terms of education and income. Because they tend to be younger than the typical U.S. tourist to British Columbia, however, Divers and Snorkellers are more apt to be engaged in the labour force. In contrast, they are much less apt to be retired (7%) than are British Columbia's visitors from the U.S. as a whole (26%).

3. Life Stage

Consistent with their ages, American Divers and Snorkellers are parents (49%) or, less commonly, a partner in a couple (36%). They live in households of about three people, on average. Their life stage and household size are very similar to *all* American tourists but, predictably in light of the age differences, differ from the U.S. market British Columbia attracts. Fewer Divers and Snorkellers are *retired older couples* (5%) than are *typical* tourists to the province (16%). Conversely, a slightly higher proportion of these underwater enthusiasts are *young couples* (17%) than is the case among Americans with recent travel experience in British Columbia (12%).

TABLE 4: HOUSEHOLD CHARACTERISTICS	Divers & Snorkellers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
HOUSEHOLD SIZE			
1 person	11%	14%	12%
2 people	35%	46%	34%
3 person	18%	15%	19%
4 people	23%	14%	20%
5+ people	13%	9%	14%
Average (all ages)	3.0	2.6	3.0
LIFESTAGE¹			
Young singles	4%	3%	3%
Middle singles	6%	7%	6%
Older singles	2%	4%	3%
Young couple	17%	12%	11%
Working older couple	14%	18%	13%
Retired older couple	5%	16%	9%
Young parent	10%	7%	13%
Middle parent	10%	5%	11%
Older parent	29%	23%	28%
Any singles	11%	14%	12%
Any couples	36%	46%	34%
Any parent	49%	35%	51%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, pages 39, 41.

¹TNS definitions for these groups are appended to this report. No cross editing with other household composition variables was performed by Research Resolutions. "All U.S. Pleasure Tourists" are Americans 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 U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. Percentages do not add to 100% because some respondents refrained from answering the question.

V. 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 U.S. Divers and Snorkellers indicated that they have taken recent vacations within the U.S.A. and almost one-third claim to have travelled *only* within their own country (see Table 5). One-fifth of them have been to Canada on a recent overnight pleasure trip (20%), suggesting that Canada is a particularly attractive destination for these diving/snorkelling enthusiasts. Why? Because only about 1-in-7 U.S. pleasure tourists as a whole have been to Canada recently (13%).

While especially successful in attracting Divers and Snorkellers vis à vis the general travelling public in the U.S., Canada trails other foreign destinations in this regard. Perhaps because of the warm waters off their coasts, destinations such as Mexico (38%) and the Caribbean (37%) attract almost twice as many Divers and Snorkellers as does Canada.

Recent pleasure travel to competitive destinations such as Mexico and the Caribbean is significantly more characteristic of Divers and Snorkellers than it is of American tourists as a whole or the subset that has recently travelled to British Columbia.

Note to Readers

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

In other words, American Divers and Snorkellers claim to have taken an overnight trip motivated by scuba diving or snorkelling 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, Divers and Snorkellers may or may not have engaged in these activities in a particular country, province or state they have visited recently for an overnight pleasure trip.

**TABLE 5: COMPETITIVE DESTINATIONS
WORLDWIDE***

	Divers & Snorkellers	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
Canada	20%	100%	13%
U.S.A.	98%	100%	98%
Other Countries (NET)	65%	52%	26%
Mexico	38%	27%	11%
Caribbean	37%	24%	11%
Europe	15%	21%	7%
South/Central America	10%	9%	3%
Asia	5%	7%	2%
Australia/New Zealand	3%	3%	1%
Africa	2%	2%	1%
Destination patterns			
Only U.S.A.	30%	-	67%
U.S.A. & Canada only	5%	48%	7%
U.S.A. & Mexico only	12%	-	5%
U.S.A. & Canada & Other Countries	15%	51%	5%
U.S.A. & Other Countries only (not Canada or Mexico)	21%	-	11%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 47.

*Locations visited on overnight pleasure trip, past two years. "All U.S. Pleasure Tourists" are Americans 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 U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

B. Canadian Destinations

One-sixth of American Divers and Snorkellers have had some travel experience in British Columbia over a ten-year period (16%) and about half this proportion (7%) are *recent* pleasure tourists in the province (see Table 6). As noted earlier, however, these Divers and Snorkellers may or may not have engaged in underwater explorations while on a trip to British Columbia or any other specific destination they claim to have visited recently.

Ontario is the principle Canadian competitor for these American travellers. Over a two-year period, this central Canadian province attracted more Divers and Snorkellers (11%) than did British Columbia.

TABLE 6: COMPETITIVE CANADIAN DESTINATIONS*	Divers & Snorkellers	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
British Columbia			
Any purpose, past 10 years	16%	100%	9%
Any purpose, past 2 years	8%	100%	4%
Pleasure, past 2 years	7%	100%	3%
Overnight Pleasure Trips in Past 2 Years to . . .			
Atlantic Canada	3%	8%	2%
Quebec	5%	9%	3%
Ontario	11%	17%	7%
Man/Sask	1%	7%	1%
Alberta	2%	15%	1%
Yukon	1%	9%	*

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 47.

*Locations visited on overnight pleasure trip, past two years. "All U.S. Pleasure Tourists" are Americans 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 U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. *Less than 0.5%

C. Out-of-State U.S. Pleasure Travel Destinations

To identify key competitive destinations *within* the U.S., this analysis focuses on **out-of-state** overnight pleasure travel by American Divers and Snorkellers (see Table 7). Information on visitation by these travellers to *all* states, including their “home state” can be found in the detailed tabulations.¹¹

Whether for scuba diving, snorkelling or any other tourism experience, Divers and Snorkellers are drawn from their home state to **sun/sea** destinations within the U.S. at a high rate. Collectively, these destinations, including Florida, California, Nevada and Hawaii attract three-quarters of Divers and Snorkellers for overnight pleasure trips. On a state-by-state basis, **Florida, California, Nevada** (likely for its casinos) and **Hawaii** and are the most popular U.S. destinations for Divers and Snorkellers when travelling outside their home state. As such, these states represent stiff competition for British Columbia’s diving and snorkelling businesses.

To assess the impact of residents travelling *within* their own state, the U.S. destination choices of American Divers and Snorkellers are shown below *excluding* and *including* (44%) residents for the U.S. market leaders. Not surprisingly, because of the size of their resident populations and popularity among out-of-state Divers and Snorkellers, the impact is most obvious for Florida and California.

<u>Destinations</u>	<u>Excluding State Residents</u>	<u>Including State Residents</u> ¹²
Florida	37%	44%
California	22%	36%
Nevada	20%	20%
Hawaii	19%	N/A ¹³

When residents are included, Florida captures over two-fifths (44%) and California captures one-third (36%) of the entire American diving market (on trips that may or may not have included snorkelling or diving). British Columbia will, needless to say, be competing with both of these states as an underwater exploration destination for their residents and for Divers and Snorkellers from other U.S. states.

¹¹ See Volumes 1 – 4, Table 47.

¹² See above.

¹³ Hawaii residents were not included in the TAMS US survey.

TABLE 7: OUT-OF-STATE U.S. DESTINATIONS* (Excluding "Own State")	Divers & Snorkellers	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
Sun/Sea States (S)	74%	75%	54%
<i>In rank order by Divers & Snorkellers</i>			
Florida (S)	37%	25%	23%
California (S)	22%	32%	13%
Nevada (S)	20%	28%	14%
Hawaii (S)	19%	19%	6%
New York State	17%	19%	11%
Arizona (S)	16%	23%	9%
Washington D.C.	13%	13%	7%
Colorado	12%	18%	7%
Illinois	12%	14%	8%
North Carolina	12%	9%	8%
Georgia	11%	9%	8%
Pennsylvania	11%	12%	9%
South Carolina (S)	10%	7%	7%
Texas (S)	10%	13%	7%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 48. *Out-of-state locations visited on overnight pleasure trip, past two years. States displayed represent destinations visited by at least 10% of Divers & Snorkellers. "All U.S. Pleasure Tourists" are Americans 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 U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

D. Destinations: Roles & Ratings

1. Importance of Destination

As they say in retail, destination, destination, destination! For most U.S. Divers and Snorkellers the first consideration in planning their most recent summer and/or winter trip was **destination** (66%) (see Table 8). At the same time, about one-fifth of these underwater explorers start their trip planning process with a focus on **activities** (20%) or begin with the **type of vacation experience** they wish to have (22%). Their level of activity-driven planning is higher than is the case among typical U.S. tourists to British Columbia (16%) or in the American travel market as a whole (13%). Divers and Snorkellers also put a premium on destination choice *per se*, with 3-in-4 claiming that it is *extremely* or *very* important to them.

TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION	Divers & Snorkellers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
First Consideration for Most Recent Summer/Winter Trip (NET)*			
Start with destination	66%	72%	62%
Start with activities	20%	16%	13%
Start with type of vacation experience	22%	19%	20%
Look for package deal	3%	3%	2%
Importance of Destination			
Extremely/Very Important	76%	73%	67%
Extremely important	34%	31%	29%
Very important	42%	42%	39%
Average**	4.1	4.0	3.9

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, pages 22, 24.

*Based on respondents who reported taking a summer and/or winter overnight pleasure trip in past two years. **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 U.S. Pleasure Tourists" are Americans 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 U.S. 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.¹⁴

Divers and Snorkellers are very similar to American overnight pleasure travellers as a whole in terms of the conditions they accord *high importance* when selecting a destination. Like other American tourists, Divers and Snorkellers put *feeling safe* at the top of their list (71%) (see Table 9).

About half of them also want a destination with *many things for adults to see and do* (52%) and approximately two-fifths want to travel in environments that pose *no health concerns* (40%), offer *mid-range lodging* and *direct air access* (38%, each). Availability of *information on the internet* (36%) and *convenient access by car* (33%) are also important to at least 1-in-3 Divers and Snorkellers when making a destination choice.

Three-in-ten Divers and Snorkellers identify *low cost travel packages* and over two-in-ten name *budget lodging* as *highly important* attributes in destination selection. Interestingly, the same proportion express interest in destinations *very similar to their own* in terms of language and culture and destinations that are *very different, culturally, than yours* (13%, each).

Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 Divers & Snorkellers¹⁵

	<u>Divers & Snorkellers</u>	<u>U.S. Pleasure Tourists</u>	
		<u>To British Columbia</u>	<u>Total</u>
Feeling safe	71%	67%	73%
Lots for adults to see/do	52%	50%	48%
No health concerns	40%	40%	43%
Mid-range accommodation	38%	37%	33%
Direct access by air	38%	34%	26%
Information available on internet	36%	28%	28%
Convenient access by car	33%	35%	51%

Compared to all U.S. tourists, underwater explorers are more likely to consider direct air access and internet information of major importance when selecting a destination. In contrast, Divers and Snorkellers are appreciably *less* apt to require convenient access

¹⁴ “Highly important”, “Somewhat important”, and “Of no importance”.

¹⁵ See Table 9 for full array of considerations deemed “highly important” and “of no importance”.

by car (33%) than is the typical American tourist (51%). These niche sector tourists more closely resemble recent U.S. tourists to British Columbia than American tourists as a whole in terms of the priorities they place on air versus automobile access.

TABLE 9: CONDITIONS FOR SELECTING A DESTINATION

	Divers & Snorkellers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
Bold rows are proportion stating "Highly Important".			
<i>In rank order by Divers & Snorkellers</i>			
Feeling safe	71%	67%	73%
Of no importance	2%	2%	2%
Lots for adults to see/do	52%	50%	48%
Of no importance	4%	4%	5%
No health concerns	40%	40%	43%
Of no importance	12%	14%	14%
Mid-range accommodation	38%	37%	33%
Of no importance	8%	9%	13%
Direct access by air	38%	34%	26%
Of no importance	10%	14%	25%
Information available on internet	36%	28%	28%
Of no importance	14%	23%	24%
Convenient access by car	33%	35%	51%
Of no importance	13%	12%	7%
Low cost packages available	30%	21%	32%
Of no importance	18%	26%	18%
Budget accommodation	23%	22%	29%
Of no importance	26%	27%	21%
Great shopping	15%	11%	16%
Of no importance	38%	44%	36%
Lots for children to see/do	14%	10%	20%
Of no importance	62%	71%	55%
Luxury accommodation	14%	9%	9%
Of no importance	42%	48%	54%
Familiar with culture & language	13%	12%	23%
Of no importance	24%	24%	17%
Very different culture than own	13%	11%	8%
Of no importance	33%	34%	48%
Camping	7%	9%	8%
Of no importance	64%	63%	65%
Convenient access by train/bus	7%	9%	8%
Of no importance	50%	45%	54%
Have friends or relatives there	5%	7%	14%
Of no importance	70%	64%	55%
Disabled-person-friendly	5%	8%	9%
Of no importance	77%	77%	71%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, pages 25. **Bold rows** are proportion stating "Highly Important". "All U.S. Pleasure Tourists" are Americans 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 U.S. 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

American Divers and Snorkellers are most enthusiastic about Hawaii as an *appealing destination* for pleasure travel, according this tropical state a rating of 9.0 on a ten-point scale (see Table 10).¹⁶ British Columbia achieves a moderately favourable rating (6.8), well below the ratings achieved by Hawaii, California (7.9), Florida (7.8) and Colorado (7.4) but about on par with those accorded Arizona (6.9) and New York State (6.8). At 6.8, British Columbia is the highest rated *Canadian* destination, enjoying significantly more favourable ratings than the closest Canadian runner-ups: Ontario (6.2), PEI (6.1) and Quebec (6.1).

Despite its success among those offering an appraisal of British Columbia's appeal, it is important to note that about one-quarter of U.S. Divers and Snorkellers refrain from rating the province, presumably because they know too little about the destination to offer an opinion about its touristic appeal.

The impact of direct experience with a destination seems to play a role in American consumers' appraisals. For example, among Americans who have recently travelled to British Columbia, the province's overall appeal rating is dramatically higher (8.7) than that volunteered by Divers and Snorkellers (6.8) or all U.S. pleasure travellers (6.2), most of whom have no direct experience with British Columbia.

Summary: Highest Appeal Destinations among Divers and Snorkellers¹⁷

	<u>Divers and Snorkellers</u>	<u>U.S. Pleasure Tourists</u>	
		<u>To British Columbia</u>	<u>Total</u>
Hawaii	9.0	8.5	8.4
California	7.9	7.8	7.3
Florida	7.8	6.8	7.3
Colorado	7.4	7.5	7.1
Arizona	6.9	7.0	6.6
New York State	6.8	7.0	6.6
British Columbia	6.8	8.7	6.2

Among the very limited number of Divers and Snorkellers who have been to British Columbia recently, the impact of direct experience is also evident. Among these

¹⁶ 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 Canadian destinations included in this question, presumably because they did not have sufficient information about the destination to form a clear image.

¹⁷ See Table 10 for full array of average ratings and proportion unable/unwilling to rate each destination.

Americans, the province is accorded a rating of 8.6 out of ten as an appealing overnight pleasure destination – a level almost on par with Hawaii.¹⁸

¹⁸ Interpret with caution because the base size of Divers and Snorkellers who have recently visited British Columbia is quite small (n = 122).

TABLE 10: APPEAL OF VARIOUS DESTINATIONS

	Divers & Snorkellers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
Bold rows are average ratings*			
British Columbia	6.8	8.7	6.2
No rating provided	24%	2%	31%
Newfoundland & Labrador	5.2	6.0	4.8
No rating provided	37%	29%	42%
Nova Scotia	5.8	6.7	5.5
No rating provided	29%	24%	35%
New Brunswick	5.3	6.1	4.9
No rating provided	39%	31%	43%
Prince Edward Island	6.1	6.9	5.6
No rating provided	31%	25%	38%
Quebec	6.1	6.8	5.8
No rating provided	22%	18%	28%
Ontario	6.2	6.8	6.1
No rating provided	21%	19%	25%
Manitoba	5.0	5.6	4.7
No rating provided	39%	31%	43%
Saskatchewan	5.1	5.6	4.8
No rating provided	38%	29%	42%
Alberta	5.6	6.8	5.2
No rating provided	34%	22%	38%
Yukon	5.6	6.3	5.1
No rating provided	32%	24%	37%
Northwest Territories	5.6	6.1	5.1
No rating provided	31%	26%	36%
New York State	6.8	7.0	6.6
No rating provided	7%	8%	10%
Colorado	7.4	7.5	7.1
No rating provided	7%	8%	11%
Florida	7.8	6.8	7.3
No rating provided	4%	6%	6%
California	7.9	7.8	7.3
No rating provided	5%	3%	7%
Hawaii	9.0	8.5	8.4
No rating provided	4%	5%	8%
Arizona	6.9	7.0	6.6
No rating provided	7%	6%	10%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, pages 26. ***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. "All U.S. Pleasure Tourists" are Americans 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 U.S. 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 Divers and Snorkellers' lists for having *many good reasons* to visit on a pleasure trip (see Table 11).¹⁹ Specifically, Hawaii tops the list with about 4-in-5 Divers & Snorkellers stating that there are many good reasons to go to this tropical destination. British Columbia is well down on the list, with only one-third of Divers and Snorkellers claiming that there are *many* good reasons to go to this province.

Led by Hawaii, California, Florida, Colorado and New York far surpass British Columbia as destinations with many reasons to visit according to Divers and Snorkellers.

Summary: Destinations With At Least One-Half Saying *Many Good Reasons to Visit* (in rank order within each category)²⁰

		U.S. Pleasure Tourists			
<u>Divers & Snorkellers</u>		<u>To British Columbia</u>		<u>Total</u>	
Hawaii	81%	British Columbia	73%	Hawaii	67%
California	66%	Hawaii	72%	Florida	54%
Florida	64%	California	63%	California	53%
Colorado	52%				
.....		Less than One-Half		
New York State	46%			Colorado	41%
Arizona	38%			New York State	40%
British Columbia	33%			Arizona	31%
				British Columbia	21%

¹⁹ 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*.

²⁰ See Table 11 for the full array of ratings. Note: to display British Columbia in the rank order sequence, some destinations beneath the 50% threshold are shown.

**TABLE 11: NUMBER OF REASONS TO VISIT
VARIOUS DESTINATIONS**

	Divers & Snorkellers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
<i>% stating "MANY" good reasons to visit</i>			
British Columbia	33%	73%	21%
<i>Rank order among Divers and Snorkellers</i>			
Hawaii	81%	72%	67%
California	66%	63%	53%
Florida	64%	45%	54%
Colorado	52%	46%	41%
New York State	46%	47%	40%
Arizona	38%	35%	31%
Ontario	25%	28%	20%
Quebec	22%	33%	18%
Nova Scotia	18%	25%	13%
Prince Edward Island	18%	25%	13%
Yukon	16%	23%	11%
Northwest Territories	15%	20%	11%
Alberta	15%	27%	10%
Newfoundland & Labrador	11%	16%	8%
New Brunswick	11%	16%	7%
Saskatchewan	8%	10%	6%
Manitoba	7%	9%	5%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 27. Proportions are those stating MANY good reasons to visit. "All U.S. Pleasure Tourists" are Americans 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 U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

VI. Activities On Overnight Trips

A. Introduction

The 2006 TAMS questionnaire included approximately 190 activities a person may have engaged in while on a trip. In addition to capturing *incidence* of participation in this array of activities, the study asks consumers to indicate whether an activity they engaged in on *any* overnight trip in the past two years was a *main reason for taking any of these trips*.²¹

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 **scuba diving or snorkelling** in the past two years, this activity is not linked to any specific destination they claim to have visited over the same time period. Thus, a trip prompted by diving or snorkelling could have been off Nanaimo to explore the HMCS Cape Breton or HMCS Saskatchewan, the Great Barrier Reef, waters around Antigua, Guadeloupe, Dominica, St Lucia or other Caribbean Islands, the coasts of Florida or California. 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* Divers and Snorkellers 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 Divers and Snorkellers provided in this chapter are appended. For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

²¹ Presumably, “these trips” are those on which the specific activity took place.

B. Trip Activities & Drivers

1. Divers & Snorkellers' Cross-Over with Other Trip Activity Sectors

As demonstrated by their representation in other activity-based tourism sectors, Divers and Snorkellers tend to be focussed on “their” sport.²² Only about 3-in-10 of them are **History/Heritage Tourists** and about one-fifth are **Alpine Skiers, Hikers, Campers/RVers** and/or **Self-Guided Overnight Touring Travellers** (see Table 12).

By indexing the share of Divers and Snorkellers in each other activity sector to the American pleasure market in total, Divers and Snorkellers' predisposition toward various activity sectors becomes very clear.

- Compared to the U.S. travelling public as a whole, Divers and Snorkellers are about **eight times** more likely to be River Rafters and about **four to five times** as likely to be Cyclists/Mountain Bikers, Nordic Skiers, and Snowmobilers.
- They are also about **three times** as likely to take trips to hike, golf, obtain Aboriginal culture and heritage experiences, or stay in backcountry lodges as a main reason for taking a trip as are typical American pleasure travellers.

²² 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 Divers and Snorkellers provided in this chapter are appended. For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

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

	Divers & Snorkellers	All U.S. Pleasure Tourists		
		To British Columbia	Any Destination	Index Divers & Snorkellers to All U.S. Tourists
Unweighted base	Total (1,478)	(1,706)	(45,697)	
Weighted, Projected	5,410,000	5,340,000	166,003,000	
<i>Rank order among Divers & Snorkellers</i>				
Divers & Snorkellers	100%	7%	3%	N/A
History and Heritage Tourists	29%	22%	14%	207
Campers/RVers	20%	16%	11%	182
Alpine Skiers	20%	13%	6%	333
Hikers	19%	11%	6%	317
Self-Guided Overnight Touring Travellers	19%	26%	11%	173
Anglers	16%	11%	8%	200
Golfers	12%	7%	4%	300
Cyclists/Mountain Bikers	9%	6%	2%	450
Aboriginal Activity Tourists	9%	9%	3%	300
River Rafter	8%	3%	1%	800
Backcountry Lodge Guests	6%	4%	2%	300
Sea Kayakers	5%	1%	*	**
Nordic Skiers	4%	5%	1%	400
Snowmobilers	4%	2%	1%	400

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 1. *Less than 0.5%. "All U.S. Pleasure Tourists" are Americans 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 U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. 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 Columbia tourism industry. **Base size too small to warrant display.

2. Major Trip Activity Groups

By definition, all Divers and Snorkellers are motivated to take overnight pleasure trips in order to *scuba dive or snorkel*. Consequently, they are all members of the more broadly defined **water-based outdoor activity** market. Like most tourists, however, Divers and Snorkellers take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.²³

- In addition to taking trips in order to go diving or snorkelling, three-fifths of these Americans take trips in order to engage in at least one **land-based outdoor activity** such as *camping, hiking, whale watching* or *viewing land-based animals*.
- The same proportion have been motivated by **entertainment** activities such as theme parks, casinos and movies (59%).
- Close to one-half have taken recent overnight pleasure trips in order to engage in a **cultural activity** such as going to well-known historic sites, museums, or cultural performances.
- **Resort** experiences, including seaside, mountain and lakeside properties motivate trips for about one-third of American Divers and Snorkellers. The same proportion take overnight pleasure trips in order to have **dining and wine-related** experiences.
- Alpine skiing, and to a lesser extent, other **outdoor winter activities, fairs or festivals**, and/or **spectator sporting events** are trip drivers for one-quarter of the market.

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, almost 9-in-10 Divers and Snorkellers *participated* in at least one land-based outdoor activity while on a recent overnight pleasure trip (85%) but less than 6-in-10 were motivated to take the trip by one of these activities (59%).

Similarly, 9-in-10 Divers and Snorkellers went to a theme park, casino or cinema on a recent trip but only 6-in-10 of them took the trip in order to do so. Food and wine experiences are especially likely to be “one-of-many” trip activities (88%) but the driving force behind a trip for relatively few Divers and Snorkellers (31%).

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 Divers and Snorkellers provided in this chapter are appended. For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

Compared to *all* U.S. overnight pleasure travellers, Divers and Snorkellers are, for the most part, at least twice as likely to identify activities in each of the major activity groups as ones that *motivated* recent trips (main reason) or were engaged in on these trips (any participation).

<u>Major Activity Group</u>	<u>Main Reason</u>	<u>Any Participation</u>
	Divers & Snorkellers	Divers and Snorkellers
	All U.S. Pleasure Tourists	All U.S. Pleasure Tourists
Outdoor Water Based	100%	100%
Outdoor Land Based	59%	85%
Theme/Amusement Parks/Movies	59%	91%
Cultural/Learning & Events	45%	79%
Outdoor Winter	25%	33%

These high levels of differentiation from *typical* American travellers are clear evidence of Divers and Snorkellers' distinctive tourism interests.

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

TABLE 13: MAJOR ACTIVITY GROUPS – MAIN & ANY	Divers & Snorkellers Overnight Trip Activities	
	Main Reason	Any Participation
Unweighted base	(1,478)	(1,478)
Weighted, Projected	5,410,000	5,410,000
Outdoor Water Based Activities	100%	100%
Outdoor Land Based Activities	59%	85%
Theme/Amusement Parks/Movies (Entertainment)	59%	91%
Cultural/Learning Activities & Events	45%	79%
Resorts	33%	64%
Food & Wine	31%	88%
Outdoor Winter Activities	25%	33%
Fairs/Festivals	25%	55%
Spectator Sports	24%	41%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 3, pages 2/11.

3. Individual Trip Activities: The Outdoors

Many outdoor experiences are popular among Divers and Snorkellers (see Table 14).²⁴ As their predisposition to snorkel, scuba dive and go to sun/sea destinations might suggest, they are especially interested in *water based travel experiences*:

- About half of them take trips in order to sunbathe or sit on a beach and two-fifths take trips in order to swim in oceans.
- Three-quarters of Divers and Snorkellers have participated in these activities on a recent overnight pleasure trip (*any*) even though the activities may not have been the reason they took the trip (*main*).
- Their interest in seaside resorts may also be associated with their desire to have sun/sea tourism experiences (Main, 25; Any, 48%).

Their **land-based outdoor** interests include going to national or state/provincial nature parks where they might be found camping, taking day hikes, seeing well-known natural wonders and/or viewing the flora and fauna.

Divers and Snorkellers are more likely than *all* U.S. overnight pleasure travellers to identify *passive* outdoor activities such as sunbathing on a beach or visiting a nature park and *active* ones such as alpine skiing, camping and hiking as activities that *motivated* recent trips (main reason) or were engaged in on these trips (any participation).

	<u>Main Reason</u>		<u>Any Participation</u>	
		All U.S.		All U.S.
<u>Outdoor Activities</u>	Divers & Snorkellers	Pleasure Tourists	Divers & Snorkellers	Pleasure Tourists
Sunbathing or sitting on a beach	53%	13%	75%	29%
Swimming in oceans	41%	9%	71%	28%
Nature park	23%	10%	43%	27%
Alpine skiing/snow boarding	20%	6%	25%	8%
Fishing	16%	8%	29%	19%
Camping - public campground	14%	7%	29%	17%

²⁴ Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Divers and Snorkellers provided in this chapter are appended. For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

These high levels of differentiation from *typical* American travellers are further evidence of Divers and Snorkellers' distinctive *outdoor* tourism interests.

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

TABLE 14: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN & ANY*

	Divers & Snorkellers Overnight Trip Activities	
	Main Reason	Any Participation
Unweighted base	(1,478)	(1,478)
Weighted, Projected	5,410,000	5,410,000
<i>In rank order by main reason within each subgroup</i>		
Scuba diving/snorkelling	100%	100%
Snorkelling in seas/oceans	73%	82%
Scuba diving in seas/oceans	35%	37%
Scuba diving in lakes/rivers	7%	10%
Snorkelling in lakes/rivers	7%	11%
Sunbathing or sitting on a beach	53%	75%
Swimming in oceans	41%	71%
Seaside resorts (lodging)	25%	48%
Nature park	23%	43%
Well known natural wonders	19%	38%
Hiking	19%	38%
Same day excursion on overnight trip	15%	36%
Hiking/backpacking as an overnight trip	8%	11%
Camping	19%	34%
In public campground in national/state/provincial park	14%	29%
Flora/fauna viewing	17%	37%
Whale watching	10%	22%
Wildlife viewing – land based animals	10%	22%
Bird watching	5%	15%
Wildflowers/flora	5%	17%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 3, pages 2/11.

*Activities shown here are those that are named by at least about 1-in-3 Divers & Snorkellers as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.

4. Individual Trip Activities: Culture, Entertainment, Food/Wine, Shopping

By and large, Divers and Snorkellers 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.²⁵ Entertainment-oriented activities in general, and particularly theme parks and casinos are, however, trip motivators for a noteworthy minority of Divers and Snorkellers (see Table 15). As noted previously, spectator sporting events are also common trip drivers, attracting about 1-in-4 Divers and Snorkellers.

Culture

Divers and Snorkellers are much more inclined to engage in a variety of cultural and heritage activities as "one-of-many" trip activities than they are to be motivated to take overnight pleasure trips in order to engage in these activities. For example, almost half have strolled around a city to observe its buildings and architecture on a recent pleasure trip but only about 1-in-6 have taken a trip in order to do so (Main, 17%; Any, 47%). Similar patterns are evident for seeing well-known historic sites and going to general history museums. These tourists are about three times as likely to go to general history and/or science and technology museums and twice as inclined to attend a cultural performance such as music concerts or live theatre *as one of their trip activities* as they are to make these attractions the driving force behind the trip.

Entertainment

Amusement parks and casinos are more likely to have motivated Divers and Snorkellers to take trips than are cultural activities. These underwater explorers are especially drawn by amusement parks (Main, 30%; Any, 46%), and, to a lesser extent, by casinos (Main, 23%; Any, 53%). Going to an aquarium is also relatively widespread among Divers and Snorkellers (Main, 14%; Any, 39%), followed by zoos and movies. Taking in a movie is much more likely to be *one of many* trip activities (40%) than a reason for taking a trip (9%) among Divers and Snorkellers.

Food & Wine

Similar to movies, dining out at restaurants offering *local* ingredients and cuisine (Main, 14%; Any, 72%), other high-end dining experiences (Main, 8%; Any, 35%), visiting local outdoor cafes (Main, 9%; Any, 49%) and going to wineries for tastings as day excursions (Main, 9%; Any, 31%) are much more common trip experiences (any) than trip drivers for Divers and Snorkellers.

²⁵ Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Divers and Snorkellers provided in this chapter are appended. For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

Shopping

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

Comparison to U.S. Pleasure Travellers

As noted in the previous section, compared to *all* U.S. overnight pleasure travellers, Divers and Snorkellers are more likely to engage in outdoor activities or take trips for these activities. While not to the same extent, these underwater explorers are also more likely than the *typical* American 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).

	<u>Main Reason</u>		<u>Any Participation</u>	
		All U.S.		All U.S.
<u>Other Activities</u>	Divers & Snorkellers	Pleasure Tourists	Divers & Snorkellers	Pleasure Tourists
Amusement parks	30%	18%	46%	34%
Casinos	23%	14%	53%	36%
Strolling in a city to see architecture	17%	7%	47%	34%
Well known historic sites	17%	8%	44%	30%
Restaurants - local ingredients/recipes	14%	6%	72%	58%
Shopping - Clothing, shoes, jewellery	11%	5%	57%	50%
Wine tasting (day visit)	9%	3%	31%	16%

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

TABLE 15: OTHER INDIVIDUAL ACTIVITIES – MAIN & ANY*

	Divers & Snorkellers Overnight Trip Activities	
	Main Reason	Any Participation
Unweighted base	(1,478)	(1,478)
Weighted, Projected	5,410,000	5,410,000
<i>In rank order by main reason within each subgroup</i>		
Cultural & Heritage		
Strolling around a city to see architecture	17%	47%
Historic sites - well known	17%	44%
Historic sites -other	14%	38%
Any Performing Arts	17%	35%
Music concerts (jazz, classical, opera)	10%	19%
Live Theatre	11%	25%
Museums (any)	14%	43%
General history	9%	30%
Science or Technology	7%	23%
Entertainment		
Amusement park	30%	46%
Casino	23%	53%
Aquariums	14%	39%
Zoos	13%	35%
Movies/cinemas	9%	40%
Food & Wine		
Dining – restaurants offering local ingredients and recipes	14%	72%
Wine tasting (day visit)	9%	31%
Local outdoor cafes	9%	49%
Dining – high end restaurants with international reputation	8%	35%
Dining - other high-end (not with international reputation)	7%	43%
Shopping		
Clothing, shoes, jewellery	11%	57%
Local arts & crafts studios	9%	51%
Bookstores or music stores	7%	42%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 3, pages 2/11.

*Activities shown here are those that are named by at least 1-in-3 Divers & Snorkellers as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.

5. Overnight Cruises & Organized Group Tours

Most Divers and Snorkellers are not recent overnight cruise passengers or organized overnight tour participants (see Table 16). Of the 2-in-5 who have taken an overnight cruise in the past two years or so, destinations in the Caribbean are appreciably more popular (27%) than are those in Alaska (5%) and other locations (13%).

Equal proportions of Divers and Snorkellers claim to have taken an **organized** overnight group tour (23%) as to have taken **self-directed** touring trips over a two-year period (19%). Those who have gone on an overnight organized tour do not display a strong preference for tours to *single* versus *multiple* destinations.

Taking a day tour while on an overnight trip (50%) is more characteristic of Divers and Snorkellers than is taking any type of overnight tour (36%). As with overnight tours, Divers and Snorkellers are just as inclined to take self-directed day tours (33%) as they are to take organized ones (36%). Favoured themes for organized day excursions include tours around a city and/or the countryside, followed by sightseeing cruises, and wilderness or outdoors tours. These same themes are popular among Divers and Snorkellers who take *self-directed* day touring excursions.²⁶

²⁶ See Detailed Tabulations, Volumes 3, 4 page 13-2 for figures.

TABLE 16: CRUISES/GROUP TOURS	Divers & Snorkellers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
Took any overnight cruise in past 2 years	41%	49%	17%
Type of Cruise/Destination			
Ocean - Caribbean	27%	19%	9%
Ocean - Alaska	5%	29%	3%
Ocean - Other	13%	15%	5%
Great Lakes	1%	1%	*
Overnight Touring (NET)	36%	48%	20%
Organized Tour	23%	32%	12%
Multiple Location	16%	26%	8%
Single Location	12%	16%	7%
Self-Directed Touring	19%	26%	11%
Same-Day Touring on Overnight Trip (NET)	50%	57%	30%
Self-Directed Touring	33%	38%	20%
Organized Excursion	36%	43%	19%
Type of Organized Day Tour			
<i>Among Organized Day Tour Takers</i>	(100%)	(100%)	(100%)
City	55%	69%	54%
Countryside	50%	60%	42%
Sightseeing cruise (day excursion)	45%	50%	34%
Wilderness/outdoor	35%	45%	26%
Wineries	17%	21%	13%
Casino	15%	18%	14%
Airplane/helicopter (pilot or passenger)	11%	16%	6%
Factory	10%	14%	7%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, pages 12/ 14.

*Less than 0.5%. "All U.S. Pleasure Tourists" are Americans 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 U.S. 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?

Almost all Divers and Snorkellers claim to have *personal involvement* in trip planning for **all** or **most** trips planned over the past two years.

In most households, the main responsibility for travel planning falls to the scuba diver or snorkeller or is shared with other household members.

TABLE 17: TRAVEL PLANNING	Divers & Snorkellers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
Frequency of personal involvement in trip planning, past 2 years			
All	65%	69%	65%
Most	19%	18%	15%
Some	9%	10%	10%
None/not stated	8%	4%	10%
Main responsibility for trip planning			
Respondent	41%	41%	39%
Spouse/partner	17%	20%	17%
Shared with other household member	27%	26%	25%
Other/not stated/not involved in travel planning	15%	13%	19%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, pages 16, 17.
 "All U.S. Pleasure Tourists" are Americans 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 U.S. 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 Divers and Snorkellers, the **internet** tops the chart (see Table 18). Over 8-in-10 of these tourists rely on the internet for travel information and about 5-in-10 use their own **past experience** and/or anecdotal information provided by **friends and relatives**. **Travel agents**, followed by **newspapers** and/or **maps** are used to obtain travel information by about 3-in-10. In the main, these are the same sources of information that are widely used by American pleasure travellers who have recently done so to take trips to British Columbia. Compared to these recent B.C. tourists, however, Divers and Snorkellers are less apt to turn to official DMO travel guides and auto clubs for travel information.

Noteworthy by their *low* usage among Divers and Snorkellers are television advertisements and consumer travel shows or sportsmen's shows. Fewer than 1-in-10 Divers and Snorkellers claim to rely on these sources of travel information.

Travel Information Sources for at least 1-in-3 Divers & Snorkellers, Recent Pleasure Tourists to British Columbia and Any Destination

(in rank order in each column)

<u>Divers & Snorkellers</u>	U.S. Pleasure Tourists	
	<u>To British Columbia</u>	<u>Total</u>
Internet website	Internet website	Internet website
Past experience	Past experience	Past experience
Advice of friends/relatives	Advice of friends/relatives	Advice of friends/relatives
Travel agent	Maps	
	Official DMO travel guides	
	Newspapers	
	Auto club	
	Travel agent	

With 8-in-10 Divers and Snorkellers relying on the internet for travel planning and about 6-in-10 saying that they *normally* visit **travel websites**, the internet has the greatest reach for snorkelling and diving businesses in British Columbia. About two-fifths of American Divers and Snorkellers also claim to watch **televised travel shows** but fewer frequently read **general travel magazines** such as *Condé Nast* (28%) or **outdoor activities/sports magazines** such as *Backpacker* or *Outdoor Life* (20%).

Compared to recent American tourists to British Columbia, Divers and Snorkellers are equally likely to read affinity group magazines such as *Outdoor Life* and generic *travel*

magazines.²⁷ Both of these types of magazines enjoy more widespread popularity among Divers and Snorkellers than they do within the general U.S. travelling public (11%, each).

Between one-third and one-quarter of Divers and Snorkellers say they frequently read the **travel section** in their local newspaper's **weekend** (32%) and/or **weekday** edition (24%). This level of readership is higher than U.S. overnight pleasure travellers as a whole but on par with *weekend* travel section readership among Americans who have recently travelled to British Columbia. At 1-in-4, Divers and Snorkellers are, however, less inclined than recent U.S. tourists to British Columbia to read the *weekday* travel section of a daily newspaper (36%).

²⁷ More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover. See Tables 36 – 41.

TABLE 18: INFORMATION SOURCES FOR TRAVEL PLANNING & GENERAL MEDIA HABITS

	Divers & Snorkellers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
<i>In rank order by Divers & Snorkellers</i>			
SOURCES OF TRAVEL PLANNING INFO			
Internet website	84%	82%	68%
Past experience	55%	60%	49%
Advice of friends/relatives	48%	54%	41%
Travel agent	35%	38%	17%
Maps	31%	49%	29%
Any newspaper	31%	40%	20%
Articles	27%	36%	16%
Advertisements	15%	20%	10%
Auto club	27%	40%	22%
Official DMO travel guides	27%	42%	18%
Travel guide books	24%	30%	11%
Visitor information centres	21%	28%	18%
Travel information in mail	21%	30%	14%
Any television	14%	19%	8%
Programs	12%	17%	6%
Advertisements	6%	6%	4%
Electronic newsletters via e-mail	13%	12%	5%
Trade, travel, sportsmen's shows	6%	7%	2%
TRAVEL MEDIA			
Frequently read newspaper Travel Section			
In weekday editions	24%	34%	16%
In weekend editions	32%	36%	20%
Magazines read in typical month			
Travel	28%	28%	11%
Outdoor activities/sports	20%	16%	11%
Normally watch Travel Shows on TV	42%	48%	29%
Normally visit Travel websites	63%	57%	39%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, pages 18, 28, 29, 30, 32. "All U.S. Pleasure Tourists" are Americans 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 U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover. See Tables 36 – 41.

C. Internet Use for Travel Inquiries & Bookings

As noted in the previous section, almost all American Divers and Snorkellers rely on the internet for travel planning. Three-quarters of those who use the internet for travel planning explore travel sites such as *Expedia* or *Travelocity* and three-fifths explore airline and/or hotel/resort sites (see Table 19). Destination marketing organization sites are used by about two-fifths of these tourists.

Not surprisingly, **booking** on-line is somewhat less common than is searching for information on the internet. Nonetheless, over 2-in-3 Divers and Snorkellers claim to have made a travel-related booking on line over the past two years or so (69%). As their website preferences would suggest, the most common on-line bookings are air tickets, followed by accommodation and, to a lesser degree, car rentals and attractions.

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING	Divers & Snorkellers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
Used Internet website for travel planning, past 2 years	84%	82%	68%
	(100%)	(100%)	(100%)
<u>Internet website(s) used</u> (Among Users)			
Travel planning/booking	72%	68%	56%
Airline	63%	67%	46%
Hotel/resort	62%	66%	53%
Destination marketing organization	43%	50%	35%
Attraction	35%	40%	33%
Cruise	28%	35%	12%
Motorcoach	3%	3%	1%
Other	29%	31%	25%
Any Internet Purchases in Past 2 Years (Among All Overnight Pleasure Travellers)	69%	68%	47%
	(100%)	(100%)	(100%)
<u>Items Purchased On-Line</u> (Among Purchasers)			
Air tickets	83%	86%	71%
Accommodation	78%	77%	72%
Car rental	51%	55%	39%
Tickets for activities/attractions	40%	34%	27%
Package deal (2+ items)	30%	31%	18%
Rail, bus, boat tickets	20%	27%	12%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, pages 19, 20.
 "All U.S. Pleasure Tourists" are Americans 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 U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

VIII. Other Travel-Related Information

A. Use of Package Deals

Purchase of package deals in the past two years is relatively uncommon among Divers and Snorkellers (see Table 20). Only about 1-in-10 say they relied on a package deal for *all* or *most* of their trips over the past two years or so (9%) and a further 2-in-5 have used package deals for *one* or *some* of these trips (38%).

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

TABLE 20: PACKAGE DEALS	Divers & Snorkellers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
Frequency of Purchasing Packages in Past 2 Years			
Most/all trips	9%	7%	5%
One/some trips	38%	42%	20%
No trips/not stated/not sure	54%	51%	75%
Desired Components of Packages (Among Purchasers of Packages)			
	(100%)	(100%)	(100%)
Accommodation	94%	96%	91%
Transport to destination	91%	89%	85%
Transport at destination	67%	74%	67%
Tickets for activities/attractions	64%	68%	62%
Food and beverage	59%	52%	52%
Other	31%	26%	22%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 21. "All U.S. Pleasure Tourists" are Americans 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 U.S. 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 among Divers and Snorkellers is the trip's ability to **relieve stress** and to provide a **break from their day-to-day** realities (see Table 21).²⁸ Three-quarters of this niche market attach a high level of importance to these benefits. Approximately two-thirds want the vacation to be the basis of lasting **memories** and to help **enrich familial relationships**. Over half want **no fixed schedule** and opportunities to **see and do something new and different**. In the main, these are the same benefits of vacations deemed to be highly important by recent American tourists to British Columbia.

5 Top Highly Important Benefits in Rank Order Among Divers & Snorkellers, Recent Pleasure Tourists to British Columbia and Any Destination²⁹

<u>Divers & Snorkellers</u>	<u>U.S. Pleasure Tourists</u>	
	<u>To British Columbia</u>	<u>Total</u>
Relax/relieve stress	Break from day-to-day	Break from day-to-day
Break from day-to-day	Relax/relieve stress	Relax/relieve stress
Memories	Memories	Memories
Relationship - partner/children	New/different	Relationship - partner/children
No fixed schedule	Relationship - partner/children	No fixed schedule

While not widely endorsed, **being pampered** is deemed to be a highly important benefit of vacations for about one-fifth of Divers and Snorkellers (21%). This is a higher level of endorsement than is found among recent American tourists to British Columbia or the U.S. travelling public as a whole (15%, each).

The same benefits are **least** likely to be deemed *highly important* to American Divers and Snorkellers, recent visitors to British Columbia and *all* U.S. travellers. These less sought outcomes of vacations include solitude and isolation and having stories to tell once the trip is over.

²⁸ 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*.

²⁹ For full array, see Table 21.

TABLE 21: BENEFITS SOUGHT FROM PLEASURE TRAVEL <i>(Highly important)</i>	Divers & Snorkellers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
<i>% Stating "Highly Important"</i>			
<i>In rank order by Divers & Snorkellers</i>			
Relax/relieve stress	75%	62%	72%
Break from day-to-day environment	75%	62%	72%
Create lasting memories	67%	60%	58%
Enrich relationship with partner/children	61%	52%	55%
No fixed schedule	56%	41%	53%
See/do something new/different	55%	59%	43%
Keep family ties alive	39%	38%	46%
Enrich perspectives	33%	36%	23%
Knowledge of history, cultures, places	26%	36%	20%
Stimulate mind/intellectual challenge	26%	29%	19%
To be pampered	21%	15%	15%
Physical challenge	19%	14%	12%
Renew personal connections (non-family)	19%	19%	19%
Stories to share	17%	13%	13%
Solitude and isolation	15%	11%	12%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 23. "All U.S. Pleasure Tourists" are Americans 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 U.S. 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 Divers and Snorkellers say that they have taken an overnight pleasure trip during the summer months (89%) and 3-in-4 have taken winter trips (77%) (see Table 22). Their *winter* travel is likely related to these travellers' interest in *sun/sea* activities and destinations including scuba diving and snorkelling.

TABLE 22: INCIDENCE OF SUMMER/ WINTER PLEASURE TRIPS	Divers & Snorkellers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected	5,410,000	5,340,000	166,003,000
Took Overnight Pleasure Trip in Past 2 Years In . . .			
Summer	89%	90%	82%
Winter	77%	81%	62%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 22. "All U.S. Pleasure Tourists" are Americans 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 U.S. 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

About half of Divers and Snorkellers are members of frequent flyer programs and auto clubs (see Table 23). Approximately one-third claim to have memberships in a hotel or car rental loyalty program and slightly fewer hold sports club memberships. Auto club, frequent flyer and loyalty program memberships are substantively more common among members of this sector than is the case within the American travelling public as a whole, but about on par with recent U.S. tourists to British Columbia.

TABLE 23: MEMBERSHIPS	Divers & Snorkellers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(1,478)	(1,706)	(45,697)
Weighted, Projected <i>In rank order by Divers & Snorkellers</i>	5,410,000	5,340,000	166,003,000
Frequent flyer program	54%	62%	31%
Auto club	51%	59%	43%
Hotel/car rental loyalty program	36%	40%	20%
Sports club	29%	26%	16%
Community service club	15%	18%	10%
Book/reading club	11%	13%	11%
Nature/environmental club	10%	9%	5%
Hobby club	8%	9%	6%
Travel club	8%	11%	4%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 3, 4, page 33. "All U.S. Pleasure Tourists" are Americans 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 U.S. 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 ³⁰	Ontario Tourism Marketing Partnership
Atlantic Canada Tourism Partnership	Parks Canada
Canadian Tourism Commission	Quebec Ministry of Tourism
Department of Canadian Heritage	Statistics Canada
Government of Northwest Territories	Tourism British Columbia
Government of Yukon	Tourism Manitoba
Ontario Ministry of Tourism	Tourism Saskatchewan

TNS Canadian Facts conducted the U.S. portion of the study between January and June 2006. The universe under study was composed of American adults (18 years and over) who were members of TNS Canadian Facts' mail panel.

Over the course of the fieldwork, 60,649 self-completed questionnaires were returned and processed by TNS Canadian Facts. Among panel members who were asked to participate in the study, the response rate was approximately 71%. The supplier has not provided the recruitment rate for panel members. In the absence of this information, it is not possible to estimate the actual response rate for the study or to comment on the representativeness of the sample overall.

Survey data were weighted and projected to the U.S. adult population based on U.S. Census estimates of household size, age and gender at a variety of city/state and/or regional levels.

Research Resolutions used the TAMS U.S. data files provided by TAMS partners. As such, the firm takes no responsibility for the quality of the data or the accuracy of the weighting and projection processes.

³⁰ Formerly *Alberta Economic Development*.

B. Trip Activity Sector Definitions

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

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

C. U.S. Census Regions & States**New England**

Maine
New Hampshire
Vermont
Massachusetts
Connecticut
Rhode Island

Middle Atlantic

New York State
Pennsylvania
New Jersey

South Atlantic

Maryland
Delaware
Washington DC
West Virginia
Virginia
North Carolina
South Carolina
Georgia
Florida

East North Central

Wisconsin
Michigan
Illinois
Indiana
Ohio

West North Central

North Dakota
South Dakota
Minnesota
Iowa
Nebraska
Kansas
Missouri

East South Central

Kentucky
Tennessee
Mississippi
Alabama

West South Central

Oklahoma
Arkansas
Texas

Louisiana

Mountain

Montana
Idaho
Wyoming
Nevada
Utah
Colorado
New Mexico

Arizona

Pacific

Washington State
Oregon
California

Alaska**Hawaii**

D. TNS Canadian Facts' "Lifestages" Definitions

- 1 - YOUNG SINGLES:
 - 1-Member Household
 - Age of Head Under 35
- 2 - MIDDLE SINGLES:
 - 1-Member Household
 - Age of Head from 35 to 65
- 3 - OLDER SINGLES:
 - 1-Member Household
 - Age of Head Over 65
- 4 - YOUNG COUPLE:
 - Multimember Household
 - Age of Head Under 45
 - Married or Non-related Individual(s) of Opposite Sex 18+ Present
 - No Children Present
- 5 - WORKING OLDER COUPLE:
 - Multimember Household
 - Age of Head 45 and Over
 - Head of Household Employed
 - No Children Present
 - Married or Non-related Individual(s) of Opposite Sex 18+ Present
- 6 - RETIRED OLDER COUPLE
 - Multimember Household
 - Age of Head 45 and Over
 - Head of Household NOT Employed
 - No Children Present
 - Married or Non-related Individual(s) of Opposite Sex 18+ Present
- 7 - YOUNG PARENT
 - Multimember Household
 - Age of Head Under 45
 - Youngest Child Under 6
- 8 - MIDDLE PARENT:
 - Multimember Household
 - Age of Head Under 45
 - Youngest Child 6+
- 9 - OLDER PARENT:
 - Multimember Household
 - Age of Head 45+
 - Child at Home - Any Age
- 0 - ROOMMATES
 - Head of Household Living with a Non-relative 18+ of Same Sex

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

TABLE A1: MAJOR ACTIVITY GROUPS – MAIN & ANY	Overnight Trip Activities - U.S. Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,706)	(1,706)	(45,697)	(45,697)
Weighted, Projected	5,340,000	5,340,000	166,003,000	166,003,000
Outdoor Water Based Activities	40%	68%	30%	56%
Outdoor Land Based Activities	50%	85%	30%	63%
Camping	15%	33%	10%	23%
Cultural/Learning Activities & Events	39%	87%	23%	61%
Theme/Amusement Parks/Movies (Entertainment)	22%	50%	22%	43%
Outdoor Winter Activities	19%	27%	8%	12%
Resorts	23%	54%	13%	32%
Fairs/Festivals	19%	57%	14%	41%
Spectator Sports	21%	41%	14%	27%
Food & Wine	22%	88%	13%	74%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, pages 2/11.

TABLE A2: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN & ANY*

	Overnight Trip Activities - U.S. Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,706)	(1,706)	(45,697)	(45,697)
Weighted, Projected	5,340,000	5,340,000	166,003,000	166,003,000
Outdoors				
Sunbathing or sitting on a beach	14%	36%	13%	29%
Swimming in oceans	9%	33%	9%	28%
Alpine skiing/snow boarding	13%	17%	6%	8%
Nature park	23%	50%	10%	27%
Camping - public campground in national/state/provincial park	12%	27%	7%	17%
Fishing	11%	23%	8%	19%
Fresh water	8%	17%	6%	15%
Salt water	5%	12%	3%	7%
Swimming in lakes	5%	21%	4%	16%
Well known natural wonders	19%	48%	7%	21%
Scuba diving/snorkelling	7%	26%	3%	12%
Snorkelling in seas/oceans	5%	24%	2%	11%
Seaside resorts (lodging)	12%	34%	7%	19%
Hiking - same day excursion on overnight trip	8%	36%	4%	18%
Hiking/backpacking as an overnight trip	6%	9%	3%	4%
Flora/fauna viewing	17%	50%	5%	21%
Wildlife viewing – land based animals	10%	33%	3%	13%
Wildflowers/flora	5%	25%	2%	9%
Whale watching	10%	31%	2%	8%
Bird watching	5%	20%	1%	7%
Cycling	6%	15%	2%	6%
Recreational cycling	4%	12%	1%	5%
Mountain biking	3%	6%	1%	2%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, pages 2/11. *Activities shown here are those that are named by at least 1-in-3 Divers & Snorkellers as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.

TABLE A3: OTHER INDIVIDUAL ACTIVITIES – MAIN & ANY*

	Overnight Trip Activities - U.S. Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,706)	(1,706)	(45,697)	(45,697)
Weighted, Projected	5,340,000	5,340,000	166,003,000	166,003,000
Cultural & Heritage				
Strolling in a city to see architecture	13%	58%	7%	34%
Well known historic sites	13%	54%	8%	30%
Museums - general history	8%	41%	4%	20%
Historic sites -other	10%	47%	6%	25%
Art galleries	7%	36%	3%	15%
Museum - Science or Technology	5%	27%	3%	12%
Any Aboriginal Culture/Events	9%	28%	3%	9%
Aboriginal heritage attractions (museums/interpretive centres)	6%	23%	2%	6%
Aboriginal arts and crafts	3%	11%	1%	3%
Entertainment				
Amusement parks	18%	35%	18%	34%
Casino	16%	50%	14%	36%
Aquariums	8%	33%	5%	21%
Water theme parks	4%	12%	5%	13%
Zoos	8%	31%	6%	21%
Farmers' markets or country fairs	7%	35%	4%	19%
Movies/cinemas	5%	41%	3%	27%
Firework displays	6%	24%	3%	16%
Food & Wine				
Dining – restaurants offering local ingredients and recipes	10%	73%	6%	58%
Dining - other high-end (not with international reputation)	6%	42%	3%	25%
Local outdoor cafes	4%	50%	2%	28%
Wine tasting (day visit)	10%	39%	3%	16%
Shopping				
Clothing, shoes, jewellery	7%	57%	5%	50%
Bookstores or music stores	5%	54%	3%	35%
Local arts & crafts studios	6%	55%	3%	34%
Antiques	5%	34%	3%	23%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, pages 2/11. *Activities shown here are those that are named by at least 1-in-3 Divers & Snorkellers as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.