



RESEARCH SERVICES

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

Focus on Nordic Skiers & Other Non-Alpine Winter Sport Participants

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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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I. Executive Summary

NORDIC SKIERS ARE A NICHE MARKET FOR BRITISH COLUMBIA.

At over one and half million, *Nordic Skiers* – American adults who take vacations *in order to* participate in *cross-country skiing, snowshoeing, dogsledding, ski touring* and *cross-country or backcountry skiing as an overnight tourism trip* – are an important tourism market. They represent 1-in-100 of the 166.0 million American overnight pleasure travellers to *any destination* and 1-in-20 of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so.

BRITISH COLUMBIA ATTRACTS NORDIC SKIERS AT A HIGHER THAN AVERAGE RATE.

While a small niche market, Nordic Skiers are five times as likely to have travelled to British Columbia recently as would be expected given their share of the total U.S. pleasure travel market. At approximately 265,000, this sector represents about five percent of the 5.3 million American adults with pleasure travel experiences in British Columbia over a two-year period.

THEY LIVE IN JUST ABOUT EVERY U.S. STATE.

Nordic Skiers live in just about every one of the fifty states and are distributed across the United States in a manner somewhat similar to the adult population as a whole, with the noteworthy exceptions of New England, South Atlantic, Mountain and Pacific states.

The **Pacific** states are home to about 1-in-6 adult Americans but more Nordic Skiers 1-in-4 live in the three Pacific states: California, Oregon or Washington. California is the most populated of the Pacific states, accounting for about 1-in-8 adult Americans but represents almost one-fifth of the entire U.S. Nordic ski market. By virtue of its large population, California contributes more Nordic Skiers than does any other single state. Nordic activities seem to be particularly popular among pleasure tourists in **East North Central** states, 1-in-6 Nordic Skiers live in these states. A higher percentage of Nordic Skiers reside in **New England** (1-in-9), whereas only 1-in-20 adult Americans do.

Regional marketing efforts to attract Nordic Skiers may be facilitated by their concentration in the Pacific region – a region that is an especially strong feeder market for British Columbia.

NORDIC SKIERS TEND TO BE IN THEIR MID FORTIES AND OLDER.

Men may predominate, but 4-in-10 Nordic Skiers are women. All age groups are represented, but a higher percentage are age 45 years of age and above. Consistent with their ages, American Nordic Skiers are parents or, less commonly, a partner in a couple. They live in households of about three people, on average.

NORDIC SKIERS ARE HIGHLY EDUCATED AND AFFLUENT.

Tourists in this niche market tend to be more highly educated (two-thirds), are more apt to occupy professional or managerial positions (one third) and to be more affluent (two-fifths fall within \$100,000+ bracket) than are typical American pleasure tourists. They more closely resemble the typical U.S. tourist to British Columbia in terms of education and income.

4-IN-10 AMERICAN NORDIC SKIERS HAVE BEEN TO CANADA ON A RECENT OVERNIGHT PLEASURE TRIP.

Canada emerges as a particularly attractive destination for Nordic Ski enthusiasts. It attracts 40% of all American Nordic Skiers, compared to only about 1-in-7 typical U.S. pleasure tourists with recent pleasure trips to Canada (13%). Canada clearly leads the market (at 40%) but other foreign competitive destinations for Nordic Skiers include Europe (26%), Mexico (19%), and the Caribbean (17%). Even though Nordic Skiers are more apt to travel outside the U.S.A. than are Americans in general, about one-third claim to have taken recent vacations only within their own country.

ONTARIO IS THE PRINCIPLE CANADIAN COMPETITOR FOR THESE AMERICAN TOURISTS.

Ontario is the principle Canadian competitor for these American travellers. Over a two-year period, this central Canadian province attracted 1-in-4 Nordic Skiers (23%) compared to **British Columbia's** 1-in-6 (17%). **Atlantic Canada** and **Quebec** also a source of competition within this market (15% and 13% respectively).

NORDIC SKIERS ARE DRAWN TO SUN/SEA STATES.

Nordic Skiers are drawn from their home state to **sun/sea** destinations within the U.S., to engage in a wide variety of tourism experiences. Collectively, these destinations, including Florida, California, Arizona, Nevada, South Carolina and Texas attract about three quarters of Nordic Skiers for overnight pleasure trips. On a state-by-state basis, **Florida**, followed by **California**, **New York**, **Arizona** and **Nevada** (more likely for gambling not Nordic Activities), **are** the most popular U.S. destinations for these tourists when travelling outside their home state. As such, these states represent stiff competition for British Columbia's Nordic activities businesses.

A SAFE DESTINATION IS A PRIORITY.

Most Nordic Skiers start a trip planning process with a *destination* in mind although nearly 3-in-10 of these tourists start their trip planning process with a focus on the **type of vacation experience** they wish to have and nearly one-quarter begin with the **activities** they want to enjoy while on their trip. The destination should be *safe*, one that has *many things for adults to see and do*, *poses no health concerns*, offers *convenient access by car*, *provides information about the destination on the internet* and has *mid-range lodging*.

NORDIC SKIERS ARE MULTI-DIMENSIONAL TRAVELLERS BUT TEND TO BE OUTDOOR TOURISTS.

There is considerable overlap between Nordic Skiers and other outdoor sectors of interest to tourism businesses in British Columbia.² As demonstrated by their representation in other activity-based tourism sectors, Nordic Skiers are multi-dimensional travellers. Over one-third of them are also **Hikers**, **Alpine Skiers**, or **History/Heritage Tourists**. Over one-quarter of them correspond to the activity profile of **Travellers on Self-Guided Overnight Touring**, or **Campers/RVers** and one-fifth are **Cyclists/Mountain Bikers**, or **Anglers**.

Their predisposition toward outdoor activities is evident in the fact that Nordic Skiers are at least six times as likely as are U.S. travellers as a whole to be Snowmobilers, River Rafters, Sea Kayakers, Hikers, Alpine Skiers, Cyclists/Mountain Bikers, and Backcountry Lodge Guests.

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

MANY OUTDOOR EXPERIENCES ARE POPULAR AMONG NORDIC SKIERS

Their higher level of engagement with the outdoors on trips vis à vis the typical American tourist suggests that these Nordic Ski enthusiasts represent distinctive markets. Although they particularly enjoy land based activities Nordic Skiers are also partial to water based activities. They like to be active while on vacation but they also enjoy taking time to enjoy and relax in nature. Their *land based outdoor* interests include hiking, alpine skiing, taking trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them, snowshoeing, cycling, climbing or viewing flora and fauna and natural wonders.

Water based activities are also popular motivations for recent overnight pleasure trips for Nordic Skiers, activities include enjoying sunbathing or sitting on a beach, swimming in oceans or lakes, kayaking/canoeing, motor/sail boating or fishing, especially in fresh water.

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

By and large, Nordic Skiers utilize destinations' cultural, culinary and retail infrastructure as *things to see and do* while on overnight pleasure trips rather than as the driving force behind or motivation for their trips. Entertainment-oriented activities in general, and particularly theme parks are, however, trip motivators for Nordic Skiers. Performing Arts and spectator sporting events are also common trip drivers, attracting about 1-in-3 of these tourists.

About one-half have sought out historic sites (well know and other), visited a museum or strolled around a city to observe its buildings and architecture on recent pleasure trips but fewer than 1-in-5 have taken a trip in order to engage in these activities. Similar patterns are evident for visiting art galleries, or attending cultural festivals and events, including Aboriginal culture and events.

Perhaps because they tend to live in families with children, Nordic Skiers are particularly apt to take a trip to go to an amusement park, the zoo, the Aquarium, farmers' markets or country fairs, fireworks displays and free outdoor performances.

Similar to many entertainment-oriented activities, dining out at restaurants offering *local* ingredients and cuisine taking a day to enjoy wine tasting, dining at high end restaurants with an international reputation and visiting local outdoor cafes are much more common trip experiences (any) than trip drivers for Nordic Skiers.

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

THE INTERNET TOPS THE CHART AS A TRIP PLANNING TOOL.

Over 8-in-10 of these tourists rely on the *internet* for travel information, 6-in-10 rely on their *own past experience* and anecdotal information provided by *friends and relatives*. About two-fifths rely on *maps* and *official DMO travel guides*, while over one-third rely on *auto clubs*, *newspapers* and *Visitor Information Centres* 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.

NORDIC SKIERS HAVE VERY FAVOURABLE IMPRESSIONS OF BRITISH COLUMBIA.

British Columbia is rated second to all other destinations (after Hawaii). It is rated higher than Colorado, California, New York State, Florida and Arizona as well as *any* other Canadian province or territory. The challenge, of course, is getting these Nordic activities enthusiasts to the province! Despite British Columbia's success among those offering an appraisal, it is important to note that about one-fifth (21%) of U.S. Nordic Skiers refrain from rating the province, presumably because they know too little about the destination to offer an opinion about its touristic appeal.

AWARENESS AND IMAGE BUILDING ARE THE KEY CHALLENGES.

With their particular constellation of outdoor interests and, for many of them, geographic proximity to British Columbia, U.S. Nordic Skiers seem an ideal market for the province. At present, however, the province is attracting only about five percent of this market, suggesting that until more of them are aware of the Nordic Ski and other outdoor activities British Columbia can offer, they may not explore beyond competing destinations in the U.S. and elsewhere in the world.

TABLE OF CONTENTS

I. Executive Summary.....	3
II. Introduction.....	10
A. BACKGROUND AND OBJECTIVES.....	10
B. THE AMERICAN NORDIC SKIERS REPORT.....	11
III. Overview of U.S. Tourism Activity Sectors	13
A. THE U.S. PLEASURE TRAVEL MARKET TO BRITISH COLUMBIA	13
B. TOURISM ACTIVITY SECTOR SIZE.....	15
C. TOURISM ACTIVITY SECTOR CROSS-OVER.....	17
IV. Nordic Skiers Market Profile.....	20
A. MARKET COMPOSITION.....	20
B. REGIONAL AND DEMOGRAPHIC CHARACTERISTICS	21
1. <i>Place of Residence</i>	21
2. <i>Personal and Household Characteristics</i>	24
3. <i>Life Stage</i>	28
V. Competitive Destinations.....	30
A. WORLDWIDE DESTINATIONS FOR OVERNIGHT PLEASURE TRIPS	30
B. CANADIAN DESTINATIONS.....	32
C. OUT-OF-STATE U.S. PLEASURE TRAVEL DESTINATIONS	33
D. DESTINATIONS: ROLES & RATINGS.....	35
1. <i>Importance of Destination</i>	35
2. <i>Importance of Conditions in Destination Choice</i>	36
3. <i>Appeal of Various Destinations</i>	38
4. <i>Number of Good Reasons to Visit Various Destinations</i>	41
VI. Activities on Overnight Trips.....	43
A. INTRODUCTION.....	43
B. TRIP ACTIVITIES & DRIVERS.....	44
1. <i>Nordic Skiers Cross-Over with Other Trip Activity Sectors</i>	44
2. <i>Major Trip Activity Groups</i>	46
3. <i>Individual Trip Activities: The Outdoors</i>	48
4. <i>Individual Trip Activities: Culture, Entertainment, Food/Wine, Shopping</i>	51
5. <i>Overnight Cruises & Organized Group Tours</i>	55
VII. Trip Planning.....	57
A. WHO DOES THE PLANNING?.....	57
B. TRAVEL INFORMATION SOURCES & TRAVEL MEDIA	58
C. INTERNET USE FOR TRAVEL INQUIRIES & BOOKINGS	60
VIII. Other Travel-Related Information.....	62
A. USE OF PACKAGE DEALS.....	62
B. BENEFITS SOUGHT FROM PLEASURE TRAVEL	63
C. INCIDENCE OF SUMMER/WINTER TRIPS.....	65
D. MEMBERSHIPS IN VARIOUS ORGANIZATIONS	66
E. SHELTER USED MOST OFTEN ON CAMPING TRIPS.....	67
F. LODGING	68

G. OWNERSHIP OF EQUIPMENT	69
IX. Appendices	70
A. ABOUT THE TRAVEL ACTIVITIES AND MOTIVATION SURVEY (TAMS)	70
B. TRIP ACTIVITY SECTOR DEFINITIONS	71
C. U.S. CENSUS REGIONS & STATES	73
D. TNS CANADIAN FACTS' "LIFESTAGES" DEFINITIONS	74
E. TRIP ACTIVITIES – RECENT B.C. AND ANY DESTINATION PLEASURE TRAVELLERS	75

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
- 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. This profile describes **Nordic Skiers & Other Non-Alpine Winter Sport Participants**, hereafter referred to as **Nordic Skiers** and/or **Nordic Ski and related activities**.

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, dogsledding, snow shoeing and cross-country or back country skiing as an overnight touring trip.

B. The American Nordic Skiers Report

For purposes of this report, **American Nordic Skiers** 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 years⁵ and indicate that one or more of the following was the **main reason** for at least one of the overnight trips they took over this same time period.

Main Reason for Trip

To participate in *any Nordic Skiing*

- ❖ To participate in **Cross Country Skiing**
- ❖ To participate in **Cross Country or back country skiing as an overnight touring trip**
- ❖ To participate in **Ski Jouring** (Cross country skiing while being pulled by a harnessed dog or sometimes a horse or reindeer).

To participate in **Dog sledding**

To participate in **Snowshoeing**

Note to Readers

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

In other words, American **Nordic Skiers** claim to have taken an overnight trip motivated by Nordic Ski/related activities 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, Nordic Skiers may or may not have been participating in Nordic Ski/related activities in a particular country, province or state they have visited recently for an overnight pleasure trip.

People who take a trip *in order to* participate in Nordic Ski/related activities (**Nordic Skiers**) are only a fraction of tourists who participate in Nordic activities on their vacations. In fact, over three million adult Americans (1%) say they went cross-country skiing or snowshoeing while on an out-of-town, overnight trip of one or more nights. Of these over three million American pleasure tourists, 41% reported that this activity was the main reason for taking at least one trip.⁶ If one looks at the same market in the past two years, there were 1,567,000 American pleasure visitors who took an overnight trip with Nordic Ski/Related activities as their main trip purpose.

Nordic Skiers 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.

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

⁶ See: TAMS 2006: U.S. Activity profile: Cross-Country Skiing and Snowshoeing While on Trips of One or More Nights, page 1 http://www.tourism.gov.on.ca/english/research/travel_activities/US%20TAMS%202006_X-Country%20Skiing%20%20Snowshoeing.pdf.

The report provides the following information:

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

III. Overview of 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).⁷ 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%).⁸ 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	
Overnight Trips to British Columbia		
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, Table 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.

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

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

The profiles of various activity-based sectors⁹ 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).¹⁰

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

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

B. Tourism Activity Sector 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.¹¹ 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 Rafter	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, Table 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.

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

In contrast, trips driven by interests in **History and Heritage, Camping and RVing** or **Self-Directed Touring** 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
- Golfers
- Heritage and History Tourists
- Campers/RVers
- Anglers.

These activities were not in numerical order.

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							
At least 20% Duplication							
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. Nordic Skiers Market Profile

A. Market Composition

The Nordic Ski sectors are composed of American pleasure tourists who participated in one or more of five types of winter outdoor activities as the *main reason* for an overnight trip in the past two years. Looking at Nordic Skiers to any destination, those who participate in cross-country skiing dominate this sector at 65%, followed by those who claim to have participated in snowshoeing (23%). While 13% took part in dog sledding, 12% participated in cross-country or back country skiing as an overnight tourism trip and finally 4% of Nordic Skiers have participated in ski jouring.¹²

Table C below illustrates the percentage and total number of American Nordic Skiers (on overnight pleasure trips) to any destination and BC, as well as American Overnight Pleasure Travellers, to any destination and BC; who indicated that their *main trip purpose* was to participate in the activities listed below:

TABLE C: MAIN REASON FOR TAKING OVERNIGHT TRIPS IN 2004-2005	US Nordic Skiers	US Nordic Skiers	Total US Pleasure Tourists	Total US Pleasure Tourists
	British Columbia	Any Destination	British Columbia	Any Destination
Unweighted base	(79)	(498)	(1,706)	(45,697)
Weighted, Projected	265,000	1,567,000	5,340,000	166,003,000
ANY WINTER OUTDOOR ACTIVITIES (NET)	100% (265,000)	100% (1,567,000)	19% (1,001,000)	8% (13,092,000)
Nordic Ski/Related Activities	100% (265,000)	100% (1,567,000)	5% (265,000)	0.9% (1,567,000)
Nordic Skiing (Any)	70% (187,000)	76% (1,184,000)	4% (187,000)	0.7% (1,184,000)
Cross Country Skiing	55% (147,000)	65% (1,019,000)	3% (147,000)	0.6% (1,019,000)
Snowshoeing	27% (71,000)	23% (354,000)	1% (71,000)	0.2% (354,000)
Dog Sledding	15% (40,000)	13% (196,000)	1% (40,000)	0.1% (196,000)
Cross/Back Country as an Overnight Touring Trip	20% (54,000)	12% (188,000)	1% (54,000)	0.1% (188,000)
Ski Jouring	5% (14,000)	4% (68,000)	0.3% (14,000)	* (68,000)

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Tables 1, 7-2 and 7-3

*Less than 0.1%.

Readers should bear in mind the prominence of *cross-country skiers* among Nordic Skiers in the analysis provided in the following pages.

¹² Sum of percentages for various Nordic activities is more than one hundred percent because of duplication.

B. Regional and Demographic Characteristics

1. Place of Residence

At over one and half million, **Nordic Skiers** – American adults who take vacations *in order to participate in cross-country skiing, snowshoeing, dogsledding, ski touring and cross-country or backcountry skiing as an overnight tourism trip* – are an important tourism market. They represent 1-in-100 American overnight pleasure travellers to *any destination* (1%) and 1-in-20 of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so (5%).

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

- The **Pacific** states are home to about 1-in-6 adult Americans (16%) but more Nordic Skiers at 1-in-4 (25%) live in the three Pacific states: California, Oregon or Washington. California is the most populated of the Pacific states, accounting for about 1-in-8 adult Americans (12%) but represents almost one-fifth of the entire U.S. Nordic ski market (17%). By virtue of its large population, California contributes more Nordic Skiers than does any other single state.
- Nordic activities seem to be particularly popular among pleasure tourists in **East North Central** states. 1-in-6 Nordic Skiers lives in these states (15.5%) which is the same for all adult Americans (16%). The Nordic Skiers in this region are spread across numerous states, with the highest percentage residing in Michigan (5%) and Illinois (4.5%).
- Nordic activities are also popular among pleasure tourists in **Middle Atlantic** states. 1-in-7 Nordic Skiers lives in these states (14%), with the highest percentage residing in New York State (9%).
- A higher percentage of Nordic Skiers reside in **New England** (1-in-9 or 11%), whereas only 1-in-20 adult Americans do (5%).
- In contrast, Nordic Skiers are less likely to live in the East and West South Central states as well as the South Atlantic region, than are Americans as a whole. For example, almost 2-in-10 Americans live in the South Atlantic region (including Florida) but only about 1-in-13 Nordic Skiers live in this area. These tourists are also under-represented in West South Central (5%) compared to the U.S. adult population as a whole (11%). Nonetheless, 1-in-20 Nordic Skiers (5%) are **Texans**.

- Other individual states that contribute at least 1-in-20 Nordic Skiers include **Colorado** and **Minnesota**.

Marketing efforts to attract Nordic Skiers may be facilitated by their concentration in the Pacific region – a region that is an especially strong feeder market for British Columbia.

TABLE 1: PLACE OF RESIDENCE	Nordic Skiers	All U.S. Pleasure Tourists		U.S. Population
	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(498)	(1,706)	(45,697)	(60,649)
Weighted, Projected	1,567,000	5,340,000	166,003,000	222,846,000
Incidence Nordic Skiers	100%	1%	5%	1%¹³
New England	11%	3%	5%	5%
Massachusetts	4%	1%	2%	2%
Middle Atlantic	14%	6%	14%	14%
New York	9%	3%	6%	7%
Pennsylvania	4%	1%	4%	4%
East North Central	16%	9%	16%	16%
Michigan	5%	2%	4%	4%
Illinois	5%	3%	4%	4%
Ohio	2%	2%	4%	4%
West North Central	6%	5%	7%	7%
South Atlantic	8%	11%	19%	19%
Florida	2%	5%	6%	6%
East South Central	2%	2%	6%	6%
West South Central	5%	6%	11%	11%
Texas	5%	5%	7%	8%
Mountain	12%	7%	7%	7%
Colorado	6%	1%	2%	2%
Pacific	25%	50%	16%	16%
California	17%	24%	13%	12%
Washington	4%	20%	2%	2%
Oregon	4%	6%	1%	1%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Tables 1 and 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.

¹³ See: TAMS 2006: U.S. Activity profile: Cross-Country Skiing and Snowshoeing While on Trips of One or More Nights, page 1 http://www.tourism.gov.on.ca/english/research/travel_activities/US%20TAMS%202006_X-Country%20Skiing%20%20Snowshoeing.pdf.

2. Personal and Household Characteristics

Age & Gender

While every age group is represented among Nordic Skiers, nearly seventy percent of this market is older than 35 years of age. A higher proportion are in their mid-thirties to mid-fifties (40%), with 1-in-4 being between 45 and 54 (25%). This being said 1-in-5 Nordic Skiers are between 25 and 34 years of age (19%) and between 55 and 64 years of age (19%) (see Table 2).

While Nordic Skiers age distribution closely resembles the age profile of all American tourists, it differs from the typical U.S. visitor to British Columbia, particularly at the younger and oldest end of the age spectrum, with more younger Nordic Skiers and fewer Nordic Skiers compared to U.S. visitors to BC. Specifically, 21% of the Americans who have recently taken an overnight pleasure trip to the province are between 18 and 34 years of age and 24% are 65 and older whereas 31% of the Nordic activities market is between 18 and 34 years of age and only 11% is 65 and older.

Men (57%) are somewhat more likely to be Nordic Skiers than are women (43%), with a similar distribution of ages 18 to 34 years and 35 to 54 years for both genders. However, 1-in-5 men are age 55 and older, whereas only 1-in-11 women age 55 and over, are Nordic Skiers.

TABLE 2: AGE & GENDER	Nordic Skiers	All U.S. Pleasure Tourists	U.S. Population	
	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(498)	(1,706)	(45,697)	(60,649)
Weighted, Projected	1,567,000	5,340,000	166,003,000	222,846,000
Age				
18 – 24 Years	12%	6%	11%	11%
25 – 34 Years	19%	15%	21%	20%
35 – 44 Years	15%	14%	17%	16%
45 – 54 Years	25%	21%	21%	21%
55 – 64 Years	19%	21%	16%	16%
65+ Years	11%	24%	14%	17%
Gender				
Men	57%	53%	49%	48%
18 – 34 Years	16%	11%	16%	16%
35 – 54 Years	20%	20%	18%	18%
55+ Years	21%	23%	15%	15%
Women	43%	47%	52%	52%
18 – 34 Years	15%	10%	16%	15%
35 – 54 Years	19%	16%	20%	19%
55+ Years	9%	21%	15%	17%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Table 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 Nordic Skiers, like tourists who live in the U.S. as a whole, are white. Compared to the U.S. adult population as a whole, Nordic Skiers tend to have higher incomes, to be university graduates and to be in executive, managerial or professional jobs (see Table 3).

Nearly two thirds of Nordic Skiers are university educated (62%), whereas only one third of the U.S. adult population as a whole has a university degree (33%).

Two thirds of Nordic Skiers are actively engaged in the labour force (67%) and just over one third live in households with at least one person occupying an executive, managerial or professional position (36%).

Nordic Skiers represent a broad range of incomes but they are more affluent than Americans as a whole. 4-in-10 have a household income over \$100,000 (38%) and 1-in-5 have household incomes over \$150,000 (17%), whereas only 1-in-16 Americans as a whole have a household income over \$150,000 (6%).

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.

**TABLE 3: RACE, EDUCATION,
OCCUPATION, INCOME**

	Nordic Skiers	All U.S. Pleasure Tourists		U.S. Population
	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(498)	(1,706)	(45,697)	(60,649)
Weighted, Projected	1,567,000	5,340,000	166,003,000	222,846,000
Race				
White	87%	87%	86%	84%
African American	2%	2%	6%	7%
Asian American	5%	4%	2%	2%
Other/Not stated	6%	7%	6%	7%
Education				
High school diploma or less	9%	9%	20%	26%
Some post-secondary	19%	23%	29%	29%
Post-secondary diploma or certificate	8%	9%	10%	10%
University degree+	62%	56%	39%	33%
Labour Force Participant¹				
	67%	62%	66%	61%
Retirees				
	15%	26%	15%	16%
Executive/Manager /Professional²				
	36%	32%	30%	26%
Household Income³				
Under \$40,000	18%	14%	27%	36%
\$40,000 - \$59,999	15%	16%	19%	18%
\$60,000 - \$99,999	29%	31%	30%	26%
\$100,000 - \$149,999	21%	22%	16%	12%
\$100,000+	38%	39%	24%	20%
\$150,000+	17%	17%	8%	6%

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

¹ Labour force participant" includes working full time, part time and self-employed. ²Male or female head of household. ³Note: 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.

3. Life Stage

Consistent with their ages, Nordic Skiers are parents (43%) or, less commonly, a partner in a couple (35%). 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 Nordic Skiers are *retired older couples* than are typical tourists to the province. Similarly more Nordic Skiers are *young and middle singles* and *any parents* than are typical tourists to the province.

TABLE 4: HOUSEHOLD CHARACTERISTICS	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
HOUSEHOLD SIZE			
1 person	14%	14%	12%
2 people	36%	46%	34%
3 person	14%	15%	19%
4 people	20%	14%	20%
5+ people	13%	9%	14%
Average (all ages)	2.9	2.6	3.0
LIFESTAGE¹			
Young singles	5%	3%	3%
Middle singles	8%	7%	6%
Older singles	2%	4%	3%
Young couple	10%	12%	11%
Working older couple	15%	18%	13%
Retired older couple	10%	16%	9%
Young parent	8%	7%	13%
Middle parent	7%	5%	11%
Older parent	27%	23%	28%
Any singles	14%	14%	12%
Any couples	35%	46%	34%
Any parent	43%	35%	51%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Tables 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. Competitive Destinations

A. Worldwide Destinations for Overnight Pleasure Trips

When asked to identify the destinations of the overnight pleasure trips they took over a two-year period, virtually all U.S. Nordic Skiers indicated that they have taken recent vacations within the U.S.A. and about one-third claim to have travelled only within their own country (see Table 5). Forty percent of them have been to Canada on a recent overnight pleasure trip, suggesting that Canada is a particularly attractive destination for these outdoor winter activities enthusiasts. This is significantly higher than the 1-in-7 U.S. pleasure tourists as a whole who have been to Canada recently (13%).

While especially successful in attracting Nordic Skiers vis-à-vis the general travelling public in the U.S., Canada shares this distinction with other foreign destinations. Nordic Skiers are simply more apt to travel outside the U.S.A. than are Americans in general.

Canada clearly leads the market (at 40%) but other foreign competitive destinations for Nordic Skiers include Europe (26%), Mexico (19%), and the Caribbean (17%).

Note to Readers

Activities and locations visited are independent of one another.

In other words, American Nordic Skiers claim to have taken an overnight trip motivated by Nordic activities 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, Nordic Skiers may or may not have participated in Nordic activities in a particular country, province or state they have visited recently for an overnight pleasure trip.

**TABLE 5: COMPETITIVE DESTINATIONS
WORLDWIDE***

	Nordic Skiers	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
Canada	40%	100%	13%
U.S.A.	100%	100%	98%
Other Countries (NET)	49%	52%	26%
Mexico	19%	27%	11%
Caribbean	17%	24%	11%
Europe	26%	21%	7%
South/Central America	10%	9%	3%
Asia	10%	7%	2%
Africa	3%	2%	1%
Australia/New Zealand	5%	3%	1%
Destination patterns			
Only U.S.A.	35%	-	67%
U.S.A. & Canada only	16%	48%	7%
U.S.A. & Mexico only	3%	-	5%
U.S.A. & Canada & Other Countries	24%	51%	5%
U.S.A. & Other Countries only (not Canada or Mexico)	16%	-	11%

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

B. Canadian Destinations

Approximately one-third of Nordic Skiers have had some travel experience in British Columbia over a ten-year period (30%) and about half this proportion, or 1-in-6, are recent pleasure tourists in the province (17%) (see Table 6). As noted earlier, however, these recent British Columbia tourists may or may not have engaged in Nordic activities in 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 1-in-4 Nordic Skiers (23%) compared to **British Columbia's** 1-in-6 (17%). **Atlantic Canada** and **Quebec** also a source of competition within this market (15% and 13% respectively).

TABLE 6: COMPETITIVE CANADIAN DESTINATIONS*	Nordic Skiers	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
British Columbia			
Any purpose, past 10 years	30%	100%	9%
Any purpose, past 2 years	20%	100%	4%
Pleasure, past 2 years	17%	100%	3%
Overnight Pleasure Trips in Past 2 Years to . . .			
Atlantic Canada	15%	8%	2%
Quebec	13%	9%	3%
Ontario	23%	17%	7%
Man/Sask	4%	7%	1%
Alberta	5%	15%	1%
Yukon	6%*	9%	**

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Table 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 Nordic Skiers (see Table 7). Information on visitation by these travellers to *all* states, including their “home state” can be found in the detailed tabulations.¹⁴

Nordic Skiers are drawn from their home state to **sun/sea** destinations within the U.S., to engage in a wide variety of tourism experiences. Collectively, these destinations, including Florida, California, Arizona, Nevada, South Carolina and Texas attract about three quarters of Nordic Skiers for overnight pleasure trips. On a state-by-state basis, **Florida**, followed by **California**, **New York**, **Arizona** and **Nevada** (more likely for gambling not Nordic Activities), **are** the most popular U.S. destinations for these tourists when travelling outside their home state. As such, these states represent stiff competition for British Columbia’s Nordic activities businesses.

To assess the impact of state residents travelling *within* their own state, the U.S. destination choices of Nordic Skiers are shown below *excluding* and *including* state residents for the U.S. market leaders. Not surprisingly, because of California’s sheer size and rich tourism product base, the impact is most obvious for this state.

<u>Destinations</u>	<u>Excluding State Residents</u>	<u>Including State Residents</u> ¹⁵
Florida	32%	33%
California	30%	43%
New York State	25%	32%
Arizona	21%	22%
Nevada	21%	21%

When residents are included, California captures almost 43% of the entire American Nordic ski and related activities market (on trips that may or may not have included participation in Nordic activities). British Columbia will, needless to say, be competing with California as a Nordic Ski destination for California residents and for the Nordic Skiers who live in other U.S. states.

¹⁴ See Volumes 1 – 4, Table 47.

¹⁵ See above.

TABLE 7: OUT-OF-STATE U.S. DESTINATIONS* (Excluding "Own State")	Nordic Skiers	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
Sun/Sea States (S)	73%	75%	54%
<i>In rank order by Nordic Skiers</i>			
Florida (S)	32%	25%	23%
California (S)	30%	32%	13%
New York State	25%	19%	11%
Arizona (S)	21%	23%	9%
Nevada (S)	21%	28%	14%
Washington D.C.	18%	13%	7%
Colorado	18%	18%	7%
Massachusetts	17%	11%	6%
Washington	17%	29%	4%
Illinois	17%	14%	8%
Virginia	16%	9%	7%
Hawaii (S)	15%	19%	6%
Pennsylvania	15%	12%	9%
Oregon	14%	26%	4%
Vermont	13%	5%	3%
New Jersey	13%	8%	6%
New Hampshire	12%	5%	3%
South Carolina (S)	12%	7%	7%
Maryland	11%	9%	6%
Alaska	11%	31%	3%
North Carolina	11%	9%	8%
Utah	11%	12%	4%
Connecticut	11%	6%	4%
Louisiana	11%	9%	5%
Texas (S)	11%	13%	7%
Wisconsin	10%	8%	5%
Wyoming	10%	10%	3%
Montana	10%	13%	3%
Maine	10%	6%	4%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume, 4, Table 48. *Out-of-state locations visited on overnight pleasure trip, past two years. States displayed represent destinations visited by at least 10.0% of Nordic Skiers. "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. Nordic Skiers the first consideration in planning their most recent summer and/or winter trip was **destination** (62%) (see Table 8). At the same time, about 29% of these tourists start their trip planning process with a focus on the **activities** they want to enjoy while on their trip, followed by nearly one-quarter with the **type of vacation experience** they wish to have (24%).

These levels of activity-driven and experience-driven planning are higher than is the case among typical U.S. tourists to British Columbia (16% and 19% respectively) or in the American travel market as a whole (13% and 20% respectively). Nordic Skiers put a premium on destination choice *per se*, with nearly three quarters claiming that it is *extremely* or *very important* to them; in fact destination is more important to them than it is to Americans with recent pleasure travel experience in British Columbia (73%).

TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
First Consideration for Most Recent Summer/Winter Trip (NET)*			
Start with destination	62%	72%	62%
Start with activities	29%	16%	13%
Start with type of vacation experience	24%	19%	20%
Look for package deal	2%	3%	2%
Importance of Destination			
Extremely/Very Important	74%	73%	67%
Extremely important	31%	31%	29%
Very important	42%	42%	39%
Average**	4.0	4.0	3.9

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Tables 22 and 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.¹⁶

Nordic Skiers 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, Nordic Skiers put *feeling safe* at the top of their list (63%) (see Table 9).

About half of them also want a destination with many things for *adults to see and do* (49%). Consistent with their interest in feeling safe, Nordic Skiers, like all U.S. tourists to any destination, also want to travel in environments that pose no health concerns (38%). Close to one-third want the destination to offer *convenient access by car*, offer *mid-range lodging* and have *destination information available on the internet*.

Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 Nordic Skiers¹⁷

	<u>Nordic Skiers</u>	<u>U.S. Pleasure Tourists</u>	
		<u>To British Columbia</u>	<u>Total</u>
Feeling safe	63%	67%	73%
Lots for adults to see/do	49%	50%	48%
No health concerns	38%	40%	43%
Convenient access by car	36%	35%	51%
Mid-range accommodation	32%	37%	33%
Information available on internet	32%	28%	28%

A quarter of Nordic Skiers feel that *budget lodging* (25%), *direct air access* (25%) and *low cost travel packages* (24%) are salient factors in a destination choice. Approximately one-fifth of these tourists identify *camping* and lots *for children to see and do* in the place they are visiting, 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 (15%) and destinations that are very different, culturally, than yours (14%). While not as widely endorsed as many other considerations, availability of camping (18%) is more prominent among Nordic Skiers than it is among the general U.S. travelling public (8%) (see Table 9 on the following page for figures).

¹⁶ “Highly important”, “Somewhat important”, and “Of no importance”.

¹⁷ See Table 9 for full array of considerations deemed “highly important” and “of no importance”.

TABLE 9: CONDITIONS FOR SELECTING A DESTINATION

	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
Bold rows are proportion stating "Highly Important".			
<i>In rank order by Nordic Skiers</i>			
Feeling safe	63%	67%	73%
Of no importance	4%	2%	2%
Lots for adults to see/do	49%	50%	48%
Of no importance	6%	4%	5%
No health concerns	38%	40%	43%
Of no importance	17%	14%	14%
Convenient access by car	36%	35%	51%
Of no importance	10%	12%	7%
Mid-range accommodation	32%	37%	33%
Of no importance	13%	9%	13%
Information available on internet	32%	28%	28%
Of no importance	23%	23%	24%
Budget accommodation	25%	22%	29%
Of no importance	23%	27%	21%
Direct access by air	25%	34%	26%
Of no importance	17%	14%	25%
Low cost packages available	24%	21%	32%
Of no importance	24%	26%	18%
Camping	18%	9%	8%
Of no importance	47%	63%	65%
Lots for children to see/do	17%	10%	20%
Of no importance	63%	71%	55%
Familiar with culture & language	15%	12%	23%
Of no importance	23%	24%	17%
Great shopping	14%	11%	16%
Of no importance	47%	44%	36%
Very different culture than own	14%	11%	8%
Of no importance	29%	34%	48%
Luxury accommodation	11%	9%	9%
Of no importance	52%	48%	54%
Have friends or relatives there	10%	7%	14%
Of no importance	64%	64%	55%
Convenient access by train/bus	9%	9%	8%
Of no importance	41%	45%	54%
Disabled-person-friendly	7%	8%	9%
Of no importance	75%	77%	71%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Table 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 Nordic Skiers are most enthusiastic about Hawaii as an *appealing destination* for pleasure travel, according this tropical state a rating of 8.2, on a ten-point scale (see Table 10).¹⁸ Though lower than Hawaii's, moderately favourable ratings are accorded a host of destinations, including British Columbia (7.6), Colorado (7.59), California (7.5) and New York State (7.0).

It is important to note that British Columbia is rated second to all other destinations (after Hawaii) and is rated higher than *any* other Canadian province or territory. The challenge, of course, is getting these Nordic activities enthusiasts to the province! Despite British Columbia's success among those offering an appraisal, it is important to note that about one-fifth (21%) of U.S. Nordic Skiers refrain from rating the province, presumably because they know too little about the destination to offer an opinion about its touristic appeal.

It is interesting to note that U.S. Nordic Skiers gave a higher rating to Prince Edward Island (6.9), Ontario (6.8) and Quebec (6.8) than to the sun/sea destinations of Florida (6.4) and Arizona (6.7).

Summary: Five Highest Appeal Destinations among Nordic Skiers¹⁹

	Nordic Skiers	U.S. Pleasure Tourists	
		To British Columbia	Total
1. Hawaii	8.2	8.5	8.4
2. British Columbia	7.60	8.7	6.2
3. Colorado	7.59	7.5	7.1
4. California	7.5	7.8	7.3
5. New York State	7.0	7.0	6.6

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 Nordic Skiers (7.6), or all U.S. pleasure travellers (6.2), most of whom have no direct experience with British Columbia.

¹⁸ 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.

¹⁹ See Table 10 for full array of average ratings and proportion unable/unwilling to rate each destination.

TABLE 10: APPEAL OF VARIOUS DESTINATIONS

	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
Bold rows are average ratings*			
British Columbia	7.6	8.7	6.2
No rating provided	21%	2%	31%
Newfoundland & Labrador	6.0	6.0	4.8
No rating provided	31%	29%	42%
Nova Scotia	6.7	6.7	5.5
No rating provided	23%	24%	35%
New Brunswick	6.1	6.1	4.9
No rating provided	34%	31%	43%
Prince Edward Island	6.9	6.9	5.6
No rating provided	27%	25%	38%
Quebec	6.8	6.8	5.8
No rating provided	15%	18%	28%
Ontario	6.8	6.8	6.1
No rating provided	18%	19%	25%
Manitoba	5.7	5.6	4.7
No rating provided	34%	31%	43%
Saskatchewan	5.7	5.6	4.8
No rating provided	34%	29%	42%
Alberta	6.6	6.8	5.2
No rating provided	28%	22%	38%
Yukon	6.6	6.3	5.1
No rating provided	28%	24%	37%
Northwest Territories	6.5	6.1	5.1
No rating provided	30%	26%	36%
New York State	7.0	7.0	6.6
No rating provided	6%	8%	10%
Colorado	7.6	7.5	7.1
No rating provided	5%	8%	11%
Florida	6.4	6.8	7.3
No rating provided	4%	6%	6%
California	7.5	7.8	7.3
No rating provided	4%	3%	7%
Hawaii	8.2	8.5	8.4
No rating provided	7%	5%	8%
Arizona	6.7	7.0	6.6
No rating provided	6%	6%	10%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Table 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 Nordic Skiers lists for having *many good reasons* to visit on a pleasure trip (see Table 11).²⁰ Specifically, Hawaii tops the list with almost two thirds of Nordic Skiers stating that there are many good reasons to go to this tropical destination.

Led by Hawaii, Colorado and California surpass British Columbia as a destination with many reasons to visit, according to Nordic Skiers. However, British Columbia is fourth on the list, with 1-in-2 Nordic Skiers claiming that there are *many* good reasons to go to this province. In fact British Columbia surpasses all other Canadian destinations as well as New York State, Florida and Arizona, as a destination that offers Nordic Skiers *many* good reasons to visit.

Summary: Destinations with At Least One-Half Saying *Many Good Reasons* to Visit
(in rank order within each category)²¹

<u>Nordic Skiers</u>		<u>U.S. Pleasure Tourists</u>			
		<u>To British Columbia</u>		<u>Total</u>	
Hawaii	65%	B.C.	73%	Hawaii	67%
Colorado	56%	Hawaii	72%	Florida	54%
California	55%	California	63%	California	53%
		Less than One-Half			
B.C.	47%			Colorado	41%
				New York State	40%
				Arizona	31%
				B.C.	21%

Among Nordic Skiers who have recently travelled to British Columbia, however, over 7-in-10 say that there are many good reasons to go (78%).²² As with the *appeal* rating discussed in the previous chapter, the province has a much more favourable image among those who have experienced what it can offer.

²⁰ 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*.

²¹ 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.

²² See Detailed Tables, Volume 4, Table 27-4

TABLE 11: NUMBER OF REASONS TO VISIT VARIOUS DESTINATIONS

	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
<i>% stating "MANY" good reasons to visit</i>			
British Columbia	47%	73%	21%
<i>Rank order among Nordic Skiers</i>			
Hawaii	65%	72%	67%
Colorado	56%	46%	41%
California	55%	63%	53%
New York State	44%	47%	40%
Florida	42%	45%	54%
Quebec	37%	33%	18%
Arizona	33%	35%	31%
Ontario	31%	28%	20%
Nova Scotia	30%	25%	13%
Prince Edward Island	30%	25%	13%
Alberta	26%	27%	10%
Yukon	24%	23%	11%
Northwest Territories	22%	20%	11%
New Brunswick	19%	16%	7%
Newfoundland & Labrador	17%	16%	8%
Saskatchewan	14%	10%	6%
Manitoba	13%	9%	5%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Table 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*.²³

Not Necessarily in Canada or British Columbia

TAMS 2006 provides two important but independent measures - where tourists went and what tourists did. Even though the tourists singled out for special scrutiny in this report claim to have taken an overnight pleasure trip motivated by **participating in Nordic Ski and related activities** in the past two years, these activities are not linked to any specific destination these tourists claim to have visited over the same time period. Thus, a trip prompted by cross-country skiing, snow shoeing, dog sledding, cross-country or back country skiing as an overnight tourism trip and ski journing, could have taken place in many parts of British Columbia, other Canadian provinces and across the U.S.A. Similarly, the park for a camping experience could have been Pacific Rim, Glacier, Death Valley, Grand Canyon, or any other park in the world; a winery could have been in the Okanagan Valley, Napa, Niagara or Bordeaux.

“Main Reason” and “Any Participation”

Tourists who indicate that a particular activity is the *main reason for taking a trip* are, in effect, expressing a much more significant commitment to the activity than are those who say they engaged in a particular activity on at least one of the overnight trips they took recently. In the following section, information is presented for selected individual or groups of related activities that *drive* Nordic Skiers 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 Nordic Skiers 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.

²³ Presumably, “these trips” are those on which the specific activity took place.

B. Trip Activities & Drivers

1. Nordic Skiers Cross-Over with Other Trip Activity Sectors

As demonstrated by their representation in other activity-based tourism sectors, Nordic Skiers are multi-dimensional travellers.²⁴ Over one-third of them are also **Hikers, Alpine Skiers, or History/Heritage Tourists** (see Table 12). Over one-quarter of them correspond to the activity profile of **Travellers on Self-Guided Overnight Touring**, or **Campers/RVers** and one-fifth are **Cyclists/Mountain Bikers, or Anglers**.

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

- Compared to the U.S. travelling public as a whole, Nordic Skiers are at least six times as likely to be Snowmobilers, River Rafters, Sea Kayakers, Hikers, Alpine Skiers, Cyclists/Mountain Bikers, and Backcountry Lodge Guests.
- They are also five times as likely to be Divers/Snorkellers.
- Nordic Skiers are more than twice as likely to take trips in order to do self guided overnight touring, go camping/RVing, go fishing, go golfing or obtain Aboriginal culture and heritage experiences than is the American travelling public as a whole.

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 Nordic Skiers 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**

	Nordic Skiers	All U.S. Pleasure Tourists		Index Nordic Skiers to All U.S. Tourists**
		To British Columbia	Any Destination	
Unweighted base	Total (498)	(1,706)	(45,697)	
Weighted, Projected	1,567,000	5,340,000	166,003,000	
<i>Rank order among Nordic Skiers</i>				
Nordic Skiers	100%	5%	1%	N/A
Hikers	37%	11%	6%	617
Alpine Skiers	36%	13%	6%	600
History and Heritage Tourists	34%	22%	14%	243
Self-Guided Overnight Touring Travellers	30%	26%	11%	273
Campers/RVers	29%	16%	11%	264
Cyclists/Mountain Bikers	22%	6%	2%	1,100
Anglers	21%	11%	8%	263
Divers & Snorkellers	15%	7%	3%	500
Backcountry Lodge Guests	14%	4%	2%	700
River Rafter	12%	3%	1%	1,200
Aboriginal Activity Tourists	11%	9%	3%	367
Snowmobilers	11%	2%	1%	1,100
Golfers	11%	7%	4%	275
Sea Kayakers	4%	1%	*	1,333

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Table 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 Columbian tourism industry. **Index calculation: Percentage Nordic Skiers in activity sector divided by All U.S. Pleasure (Any Destination) in activity sector, multiplied by 100.

2. Major Trip Activity Groups

By definition, all Nordic Skiers are motivated to take overnight pleasure trips in order to engage in Nordic Ski and related activities. Consequently, they are all members of the more broadly defined *outdoor winter activity* market. Like most tourists, Nordic Skiers take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.²⁵

- In addition to taking trips in order to go cross country skiing, snow shoeing, dog sledding, ski touring or cross country/back country skiing as an overnight touring trip, all of these Americans take trips in order to engage in at least one **water-based outdoor activity** such as fishing, kayaking/canoeing, rafting, motor/sail boating or diving/snorkelling.
- Almost three quarters of these Americans take trips in order to engage in at least one **land-based outdoor activity** such as camping, cycling, hiking, visiting national, provincial/state parks, Flora/Fauna viewing, whale watching or viewing land-based animals, hunting or climbing.
- Over fifty percent of Nordic Skiers have taken trips motivated by **cultural** interests such as going to well-known historic sites, museums, or cultural performances.
- One third of Nordic Skiers take trips to have **dining and wine-related** experiences and to engage in **entertainment** activities such as theme parks, casinos and movies and nearly the same proportion stay in a seaside or lakeside **resort** or spa as a reason for taking a trip.
- One in three Nordic Skiers attend **Fairs and Festivals**; go to **spectator sporting events** such as professional baseball or football games.

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, more Nordic Skiers *participated* in at least one land-based outdoor activity while on a recent overnight pleasure trip (90%) than claim to have taken a trip motivated by one of these activities (74%).

Food and wine experiences are especially likely to be “one-of-many” trip activities (90%) but the driving force behind a trip for only a third of segment members (35%).

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 Nordic Skiers 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.

Similarly, over 8-in-10 Nordic Skiers went to a museum, gallery or cultural performance on a recent trip but only 5-in-10 took the trip in order to do so.

Compared to *all* U.S. overnight pleasure travellers, Nordic Skiers are, for the most part, almost 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>	
	Nordic Skiers	All U.S. Pleasure Tourists	Nordic Skiers	All U.S. Pleasure Tourists
Outdoor Winter Activities	100%	8%	100%	12%
Outdoor Water Based Activities	100%	30%	100%	56%
Outdoor Land Based Activities	74%	30%	90%	63%
Cultural/Learning & Events	54%	23%	86%	61%
Food & Wine	35%	13%	90%	74%
Theme/Amusement Parks/Movies	35%	22%	58%	43%

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		Nordic Skiers	
		Main Reason	Any Participation
Unweighted base		(498)	(498)
Weighted, Projected		1,567,000	1,567,000
Outdoor Winter Activities		100%	100%
Cross Country Skiing		65%	70%
Snowshoeing		23%	32%
Dog Sledding		13%	15%
Cross Country/Back country skiing as an overnight touring trip		12%	14%
Ski Jouring		4%	6%
Outdoor Water Based Activities		100%	100%
Outdoor Land Based Activities		74%	90%
Cultural/Learning Activities & Events		54%	86%
Food & Wine		35%	90%
Theme/Amusement Parks/Movies (Entertainment)		35%	58%
Resorts		33%	67%
Fairs/Festivals		31%	63%
Spectator Sports		29%	46%

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

3. Individual Trip Activities: The Outdoors

Many outdoor experiences are popular among Nordic Skiers (see Table 14)²⁶. Although they particularly enjoy land based activities they are also partial to water based activities. They like to be active while on vacation but they also enjoy taking time to enjoy themselves and relax in nature.

Land Based Activities:

- Nordic Skiers are especially interested in land-based travel experiences, about 4-in-10 go hiking or alpine skiing while 3-in-10 take trips to visit a national, provincial or state nature parks either to visit the parks or to camp in them.
- Snowshoeing, cycling, climbing or viewing flora and fauna and natural wonders are motivations for recent overnight pleasure trips for over 2-in-10 Nordic Skiers.

Water based Activities:

- Water based activities are also popular motivations for a recent overnight pleasure trips for Nordic Skiers, nearly 3-in-10 enjoying sunbathing or sitting on a beach.
- 2-in-10 Nordic Skiers enjoy swimming in oceans or lakes, kayaking/canoeing, motor/sail boating or fishing, especially in fresh water.

Compared to the typical U.S. overnight pleasure traveller, a Nordic Skier is more likely to identify *passive* outdoor activities such as sunbathing on a beach or nature viewing and *active* ones such as alpine skiing, hiking, cycling, fishing, snowshoeing or swimming or as ones that *motivated* recent trips (main reason) and as activities that were engaged in on these trips (any participation). Their higher level of engagement with the outdoors on trips vis à vis the typical American tourist suggests that these Nordic Ski enthusiasts represent distinctive markets. [See the summary table on the following page.]

²⁶ 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 Nordic Skiers 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.

	<u>Main Reason</u>		<u>Any Participation</u>	
	Nordic Skiers	All U.S. Pleasure Tourists	Nordic Skiers	All U.S. Pleasure Tourists
<u>Outdoor Activities</u>				
Nordic Skiing	76%	1%	79%	2%
Hiking	37%	6%	56%	19%
Alpine Skiing	36%	6%	43%	8%
Nature Park	30%	10%	51%	27%
Sunbathing/sitting on a beach	28%	13%	46%	29%
Camping	27%	10%	53%	23%
Snowshoeing	23%	0.2%	32%	1%
Cycling	22%	2%	37%	6%
Fishing	22%	8%	33%	19%
Flora/Fauna viewing	22%	5%	48%	21%
Swimming in Oceans	22%	9%	53%	28%

These high levels of differentiation from typical American travellers are further evidence of Nordic Skiers 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*

	Nordic Skiers	
	Main Reason	Any Participation
Unweighted base	(498)	(498)
Weighted, Projected	1,567,000	1,567,000
<i>In rank order by main reason within each subgroup</i>		
Nordic Skiing	76%	79%
Cross Country Skiing	65%	70%
Hiking	37%	56%
Same day excursion on overnight trip	25%	52%
Hiking/backpacking as an overnight rip	24%	30%
Alpine Skiing	36%	43%
Downhill skiing	28%	35%
Snowboarding	12%	16%
Nature park	30%	51%
Sunbathing or sitting on a beach	28%	46%
Camping	27%	53%
Public campground	22%	45%
Camp site in wilderness setting	15%	25%
Private campground	9%	25%
Snowshoeing	23%	32%
Cycling	22%	37%
Recreational Cycling	16%	31%
Mountain Biking	8%	15%
Fishing	22%	33%
Fresh water	18%	29%
Flora/fauna viewing	22%	48%
Wildlife viewing – land based animals	14%	33%
Whale watching	12%	24%
Wildflowers/flora	7%	26%
Bird watching	7%	22%
Swimming in oceans	22%	53%
Well known natural wonders	21%	47%
Climbing	18%	26%
Kayaking/Canoeing	17%	31%
Motor/Sail boating	17%	34%
Swimming in lakes	17%	47%
Diving/snorkelling	15%	32%
Jogging or exercising outdoors	11%	32%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Tables 2 to 11.*Activities shown here are those that are named by at least about 1-in-3 Nordic Skiers 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, Nordic Skiers 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.²⁷ Entertainment-oriented activities in general, and particularly theme parks are however, trip motivators for Nordic Skiers (see Table 15). Performing Arts and, as noted previously, spectator sporting events are also common trip drivers, attracting about 1-in-3 of these tourists.

Culture

One quarter of Nordic Skiers have been motivated to take an overnight trip to attend arts performances such as classical music concerts, opera or ballet. Despite this, Nordic Skiers are more inclined to engage in a variety of cultural and heritage activities as "one-of-many" trip activities than they are to be motivated to take overnight pleasure trips in order to engage in these activities. About one-half have sought out historic sites (well know and other), visited a museum or strolled around a city to observe its buildings and architecture on recent pleasure trips but fewer than 1-in-5 have taken a trip in order to engage in these activities. Similar patterns are evident for visiting art galleries, or attending cultural festivals and events, including Aboriginal culture and events. These tourists are two to three times as likely to engage in these activities *as one of their trip activities* as they are to consider them as the driving force behind the trip.

Entertainment

Perhaps because they tend to live in families with children, Nordic Skiers are particularly apt to take a trip to go to an amusement park (Main, 31%; Any, 46%) or Zoos (Main, 16%; Any, 42%). Movies attract about one-half of Nordic Skiers while Aquariums, farmers' markets or country fairs, fireworks displays, free outdoor performances and visiting botanical gardens are popular trip activities (*any*) among about one-third. Casinos are also popular entertainment venues (Main, 19%; Any, 43%). All of these entertainment-oriented experiences are much more commonly identified as *one among many* trip activities than as a main reason for taking a trip for Nordic Skiers.

Food

Similar to many entertainment-oriented activities, dining out at restaurants offering *local* ingredients and cuisine (Main, 15%; Any, 76%), taking a day to enjoy wine tasting (Main, 14%; Any, 41%), dining at high end restaurants with an international reputation

²⁷ 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 Nordic Skiers 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.

(Main, 10%; Any, 37%) and visiting local outdoor cafes (Main, 9%; Any, 60%) are much more common trip experiences (any) than trip drivers for Nordic Skiers.

Shopping

Shopping for apparel, books or music, or local arts and crafts and antiques is a common trip pastime for Nordic Skiers 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, Nordic Skiers are more likely to engage in outdoor activities or take trips for these activities. These Nordic ski enthusiasts 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). Nordic Skiers are six times more likely to participate in hands on learning activities than are *typical* American pleasure travellers and three times more likely to attend arts performances, museums, historic sites, zoos or aquariums.

	<u>Main Reason</u>		<u>Any Participation</u>	
	Nordic	All U.S. Pleasure Tourists	Nordic	All U.S. Pleasure Tourists
<u>Other Activities</u>				
Amusement parks	31%	18%	46%	34%
Spectator Sports (Any)	29%	14%	46%	27%
Performing Arts (Any)	24%	7%	51%	20%
Museum (Any)	21%	7%	59%	30%
Casinos	19%	14%	43%	36%
Strolling in a city to see architecture	19%	7%	57%	34%
Any hands on learning activities	19%	3%	37%	10%
Historic sites (Other)	16%	6%	46%	25%
Zoo	16%	6%	42%	21%
Aquarium	16%	5%	38%	21%
Restaurants - local ingredients/recipes	15%	6%	76%	58%

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*

	Nordic Skiers	
	Main Reason	Any Participation
Unweighted base	(498)	(498)
Weighted, Projected	1,567,000	1,567,000
<i>In rank order by main reason within each subgroup (Nordic Skiers)</i>		
Cultural & Heritage		
Any Performing Arts	24%	51%
Live Theatre	13%	38%
Music Performances (Classical/Jazz/Opera)	13%	29%
Museum – Any	21%	59%
General History Museum	13%	46%
Science or Technology	9%	32%
Military/War Museum	10%	26%
Strolling around a city to see architecture	19%	57%
Any Hands on Learning Activities	19%	37%
Historic sites -other	16%	46%
Any Cultural Festivals/Events	15%	29%
Well known historic sites	14%	54%
Art Galleries	12%	40%
Any Aboriginal Culture/Events	11%	29%
Aboriginal heritage attractions (museums/interpretive centres)	7%	23%
Aboriginal arts and crafts	5%	18%
Entertainment		
Amusement park	31%	46%
Casino	19%	43%
Zoos	16%	42%
Aquariums	16%	38%
Firework displays	14%	36%
Farmers' markets or country fairs	14%	38%
Botanical Gardens	11%	34%
Movies/cinema	10%	49%
Free outdoor performances	9%	38%
Food & Wine		
Dining – restaurants offering local ingredients and recipes	15%	76%
Wine tasting (day visit)	14%	41%
Dining high-end (with international reputation)	10%	37%
Local outdoor cafes	9%	60%
Dining - other high-end (not with international reputation)	8%	40%
Shop or browse gourmet food in retail stores	7%	33%
Shopping		
Clothing, shoes, jewellery	10%	59%
Bookstores or music stores	10%	58%
Local arts & crafts studios	10%	55%
Antiques	8%	37%

TABLE 15: OTHER INDIVIDUAL ACTIVITIES – MAIN & ANY*

	Nordic Skiers	
	Main Reason	Any Participation
Unweighted base	(498)	(498)
Weighted, Projected	1,567,000	1,567,000
<i>In rank order by main reason within each subgroup (Nordic Skiers)</i>		
Spectator Sports (Any)	29%	46%
Professional baseball games	10%	24%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Tables 2 to 11. *Activities shown here are those that are named by at least 1-in-3 Nordic Skiers 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 Nordic Skiers are not recent overnight cruise passengers or organized overnight tour participants (see Table 16). Of the 1-in-3 Nordic Skiers who have taken an overnight cruise in the past two years or so, destinations in the Caribbean and other locations are somewhat more popular than is Alaska.

Equal proportions of Nordic Skiers claim to have taken an **organized** overnight group tour (30%) as to have taken **self-directed** touring trips over a two-year period (30%). Those who have gone on an overnight organized tour display slightly more preference for tours to *multiple* versus *single* destinations.

Taking a day tour while on an overnight trip is more characteristic of Nordic Skiers (51%) than is taking any type of overnight tour (47%). Unlike overnight tours, however, Nordic Skiers are somewhat more inclined to take self-directed day tours (41%) than they are to take organized ones (33%).

Favoured themes for *organized day excursions* include tours around a city and/or the countryside, wilderness or outdoor tours and sightseeing cruises. These same themes are popular among Nordic Skiers who take *self-directed* day touring excursions.²⁸

²⁸ See Detailed Tabulations, Volume 4 Table 13-2 for figures.

TABLE 16: CRUISES/GROUP TOURS	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
Took any overnight cruise in past 2 years	32%	49%	17%
Type of Cruise/Destination			
Ocean - Caribbean	13%	19%	9%
Ocean - Other	14%	16%	5%
Ocean - Alaska	8%	29%	3%
Great Lakes	4%	1%	*
Overnight Touring (NET)	47%	48%	20%
Organized Tour	30%	32%	12%
Multiple Location	25%	26%	8%
Single Location	17%	16%	7%
Self-Directed Touring	30%	26%	11%
Same-Day Touring on Overnight Trip (NET)	51%	57%	30%
Self-Directed Touring	41%	38%	20%
Organized Excursion	33%	43%	19%
Type of Organized Day Tour			
<i>Among Organized Day Tour Takers</i>	(100%)	(100%)	(100%)
City	67%	69%	54%
Countryside	56%	60%	42%
Wilderness/outdoor	53%	45%	26%
Sightseeing cruise (day excursion)	48%	50%	34%
Wineries	35%	21%	13%
Casino	29%	18%	14%
Factory	17%	14%	7%
Airplane/helicopter (pilot or passenger)	13%	16%	6%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Tables 12 to 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 Nordic Skiers 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 skier (44%) while one quarter of trip planning is shared with other household members.

TABLE 17: TRAVEL PLANNING	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
Frequency of personal involvement in trip planning, past 2 years			
All	63%	69%	65%
Most	24%	18%	15%
Some	7%	10%	10%
None/not stated	6%	4%	10%
Main responsibility for trip planning			
Respondent	44%	41%	39%
Shared with other household member	25%	26%	25%
Spouse/partner	16%	20%	17%
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, Volume 4, Tables 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 Nordic Skiers, the internet tops the chart (see Table 18). Over 8-in-10 of these tourists rely on the internet for travel information, 6-in-10 rely on their own past experience and anecdotal information provided by friends and relatives. About two-fifths rely on maps and official DMO travel guides, while over one-third rely on auto clubs, newspapers and Visitor Information Centres 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.

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

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

(In rank order in each column)

<u>Nordic Skiers</u>	<u>U.S. Pleasure Tourists</u>	
	<u>To British Columbia</u>	<u>Total</u>
Internet website	Internet website	Internet website
Past experience	Past experience	Past experience
		Advice of
Advice of friends/relatives	Advice of friends/relatives	friends/relatives
Maps	Maps	
Official DMO travel guides	Official DMO travel guides	
Newspapers	Newspapers	
Auto club	Auto club	
Visitor Information Centres	Travel agent	

With 8-in-10 Nordic Skiers relying on the internet for travel planning and over 6-in-10 saying that they *normally* visit **travel websites**, the internet has the greatest reach for Nordic Ski oriented tourism businesses in British Columbia. Nearly half (46%) of American Nordic Skiers also claim to watch televised travel shows, and about one-third frequently read the travel section in newspapers and outdoor activities/sports magazines such as Backpacker or Outdoor Life (29%), while one-quarter read general travel magazines such as Condé Nast (24%).

Compared to recent American tourists to British Columbia, Nordic Skiers are somewhat more likely to read affinity group magazines such as *Outdoor Life* but less inclined to read generic *travel* magazines. Frequent readership of travel sections in a local newspaper's weekend or weekday editions is slightly less common among

Nordic Skiers than it is among U.S. overnight pleasure travellers who have recently travelled to British Columbia but is higher than U.S. overnight pleasure travellers as a whole.²⁹

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

	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
<i>In rank order by Nordic Skiers</i>			
<u>SOURCES OF TRAVEL PLANNING INFO</u>			
Internet website	84%	82%	68%
Past experience	60%	60%	49%
Advice of friends/relatives	57%	54%	41%
Maps	43%	49%	29%
Official DMO travel guides	38%	42%	18%
Any newspaper	36%	40%	20%
Articles	33%	36%	16%
Advertisements	19%	20%	10%
Auto club	36%	40%	22%
Visitor information centres	35%	28%	18%
Travel agent	29%	38%	17%
Travel guide books	27%	30%	11%
Travel information in mail	26%	30%	14%
Any television	18%	19%	8%
Programs on TV	16%	17%	6%
Advertisements on TV	7%	6%	4%
Electronic newsletters via e-mail	11%	12%	5%
Trade, travel, sportsmen's shows	9%	7%	2%
<u>TRAVEL MEDIA</u>			
Frequently read newspaper Travel Section			
In weekday editions	31%	34%	16%
In weekend editions	34%	36%	20%
Magazines read in typical month			
Travel	24%	28%	11%
Outdoor activities/sports	29%	16%	11%
Normally watch Travel Shows on TV	46%	48%	29%
Normally visit Travel websites	59%	57%	39%

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

²⁹ 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, most Nordic Skiers and tourists who have taken a recent pleasure trip to British Columbia rely on the internet for travel planning. Travel sites such as *Expedia* or *Travelocity*, followed by hotel/resort sites and airline sites are the most commonly used websites among these American tourists who rely on the internet for travel planning (see Table 19). Over half of these tourists use destination marketing organization sites (55% which is higher than U.S. overnight pleasure travellers who have recently travelled to British Columbia, 50% and U.S. overnight pleasure travellers as a whole, 35%) and 2-in-5 internet users include attractions sites.

Not surprisingly, **booking** on-line is somewhat less common than is searching for information on the internet. Nonetheless, over two thirds of American Nordic Skiers (69%) claim to have made a travel-related booking on-line over the past two years or so. 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.

Use of the internet for travel planning and for booking travel arrangements is noticeably more widespread among Nordic Skiers than among U.S. overnight pleasure travellers as a whole.

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	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	68%	68%	56%
Hotel/resort	68%	66%	53%
Airline	64%	67%	46%
Destination marketing organization	55%	50%	35%
Attraction	40%	40%	33%
Cruise	17%	35%	12%
Motorcoach	4%	3%	1%
Other	35%	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	85%	86%	71%
Accommodation	83%	77%	72%
Car rental	55%	55%	39%
Tickets for activities/attractions	38%	34%	27%
Rail, bus, boat tickets	25%	27%	12%
Package deal (2+ items)	23%	31%	18%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Tables 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 Nordic Skiers (see Table 20). Only about 1-in-16 say they relied on a package deal for *all* or *most* of their trips over the past two years or so (6%) and a further 1-in-3 have used package deals for *one* or *some* of these trips (33%).

Nordic Skiers 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	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
Frequency of Purchasing Packages in Past 2 Years			
Most/all trips	6%	7%	5%
One/some trips	33%	42%	20%
No trips/not stated/not sure	61%	51%	75%
Desired Components of Packages (Among Purchasers of Packages)			
	(100%)	(100%)	(100%)
Accommodation	91%	96%	91%
Transport to destination	81%	89%	85%
Transport at destination	66%	74%	67%
Tickets for activities/attractions	65%	68%	62%
Food and beverage	56%	52%	52%
Other	31%	26%	22%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Table 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 is the ability to **relieve stress** and a **break from the day-to-day environment** (see Table 21).³⁰ Over two-thirds of this market attach a high level of importance to these attributes.

Approximately three-fifths want their vacations to be the basis of lasting **memories** while over half of Nordic Skiers regard **seeing and doing something different**, enriching **familial relationships** and **abandoning a fixed schedule** as highly important benefits of vacations. By and large, these are the same benefits of vacations deemed to be highly important by recent American tourists to British Columbia and American overnight pleasure travellers in general.

5 Top Highly Important Benefits in Rank Order Among Nordic Skiers and Recent Pleasure Tourists to British Columbia and Any Destination³¹

<u>Nordic Skiers</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
New/different	New/different	Relations - partner/children
Relations - partner/children	Relations - partner/children	No fixed schedule

While not as widely endorsed as those cited above, **keeping family ties alive**, **enriching ones perspective on life** and **being physically challenged**³², are important benefits of pleasure travel experiences for about one third of Nordic Skiers. **Being physically challenged** is more highly endorsed by Nordic Skiers (31%) than is found among recent American tourists to British Columbia (14%) or the U.S. travelling public as a whole (12%).

The same benefits are least likely to be deemed highly important to American Nordic Skiers, recent visitors to British Columbia and all U.S. travellers as a whole. These less sought outcomes of vacations include **having stories to tell** once the trip is over, the opportunity to experience **solitude and isolation** and **being pampered**.

³⁰ 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*.

³¹ For full array, see Table 21.

³² *To be challenged physically/feel physically energized.*

TABLE 21: BENEFITS SOUGHT FROM PLEASURE TRAVEL *(Highly important)*

	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
% Stating "Highly Important"			
<i>In rank order by Nordic Skiers</i>			
Relax/relieve stress	68%	62%	72%
Break from day-to-day environment	67%	62%	72%
Create lasting memories	59%	60%	58%
See/do something new/different	54%	59%	43%
Enrich relationship with partner/children	54%	52%	55%
No fixed schedule	51%	41%	53%
Keep family ties alive	41%	38%	46%
Enrich perspectives	36%	36%	23%
Physical challenge	31%	14%	12%
Stimulate mind/intellectual challenge	30%	29%	19%
Knowledge of history, cultures, places	30%	36%	20%
Renew personal connections (non-family)	23%	19%	19%
Stories to share	20%	13%	13%
Solitude and isolation	17%	11%	12%
To be pampered	17%	15%	15%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Table 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 Nordic Skiers say that they have taken an overnight pleasure trip during the summer months (94%).

Due to the nature of the activities that Nordic Skiers enjoy participating in, taking winter trips (see Table 22) is more prevalent for this market (89%) than is found among recent American tourists to British Columbia (81%) or the U.S. travelling public as a whole (62%).

TABLE 22: INCIDENCE OF SUMMER/ WINTER PLEASURE TRIPS	Nordic Skiers	All U.S. Pleasure Tourists	
		To British Columbia	Any Destination
Unweighted base	Total (498)	(1,706)	(45,697)
Weighted, Projected	1,567,000	5,340,000	166,003,000
Took Overnight Pleasure Trip in Past 2 Years			
In . . .			
Summer	94%	90%	82%
Winter	89%	81%	62%

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

An auto club membership is characteristic of approximately 6-in-10 Nordic Skiers (59%) followed by a frequent flyer program membership (55%), (see Table 23). About 3-in-10 of these tourists are members of a hotel or car rental loyalty program and/or sports club, and 2-in-10 claim to have memberships in community service clubs and nature/environmental clubs.

Membership in a nature/environmental club is much more prevalent among Nordic Skiers (21%) than it is among recent visitors to British Columbia (9%) or the American travelling public as a whole (5%).

TABLE 23: MEMBERSHIPS	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected <i>In rank order by Nordic Skiers</i>	1,567,000	5,340,000	166,003,000
Auto club	59%	59%	43%
Frequent flyer program	55%	62%	31%
Hotel/car rental loyalty program	35%	40%	20%
Sports club	30%	26%	16%
Community service club	23%	18%	10%
Nature/environmental club	21%	9%	5%
Book/reading club	16%	13%	11%
Hobby club	12%	9%	6%
Travel club	11%	11%	4%

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

E. Shelter Used Most Often on Camping Trips

Over half of the American Nordic Skiers (53%) have taken a camping trip in the past two years. Of these Nordic Skiers that camp, they use a *tent* most often for shelter on recent camping trips (60%) to a much greater extent than they rely on a *motor home or RV* for shelter (14%).

Use of tents among Nordic Skiers who go camping is higher than is the case among typical American tourists who have been camping and those who have recently travelled to British Columbia.³³

TABLE 24: SHELTER USED MOST OFTEN ON CAMPING TRIPS	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Took Camping Trip in Past Two Years (Weighted, Projected)	822,000	1,735,000	38,328,000
Tent	60%	48%	52%
Tent trailer	5%	5%	6%
Truck camper or van	5%	7%	4%
Travel trailer/ fifth wheel	8%	13%	15%
Motor home or RV	14%	18%	13%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Table 46. "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.

³³ All U.S. Pleasure Tourists to British Columbia and "any destination" displayed in this table are those who claim to have been camping in the past two years, whether as *any* activity or a trip or as the *main* activity.

F. Lodging

Over two thirds of Nordic Skiers who used lodging while on a pleasure trip in the past two years have stayed at a resort or spa. As is expected, over half of Nordic Skiers stay at a ski resort or mountain resort and they are five times more likely than typical American tourists to stay at resorts such as these. Nearly one third of Nordic Skiers have stayed at a seaside or lake/riverside resort and nearly half have stayed at a public campground (45%), while one quarter have camped in a wilderness setting or private campground.

Use of lodging among Nordic Skiers is higher than is the case among typical American tourists and those who have recently travelled to British Columbia.

TABLE 25: LODGING USED WHILE ON AN OVERNIGHT PLEASURE TRIP IN PAST TWO YEARS	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
(Weighted, Projected)	1,300,000	3,683,000	80,796,000
Used Any Lodging	83%	69%	49%
Resort/Spa (any)	67%	54%	32%
Ski resort or mountain resort	50%	23%	9%
Seaside Resort	32%	34%	19%
Lakeside/riverside resort	32%	24%	13%
Health Spa	12%	7%	3%
Camping			
Public campground in national/provincial/state park	45%	27%	17%
Campsite in wilderness setting	25%	9%	5%
Private Campground	25%	15%	10%
Wilderness/remote lodge	22%	12%	4%
Houseboat	12%	3%	1%
Motorhome/RV while touring (not camping)	11%	10%	4%
Farm or guest ranch	10%	3%	2%
Other lodging (any)	59%	38%	26%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Table 6. "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.

G. Ownership of Equipment

3-in-10 Nordic Skiers own canoes or kayaks and 2-in-10 own motorboats, this is evidence of their preference for water based activities and staying at riverside or lakeside resorts. However, ownership of a snowmobile or sailboat is less common.

Ownership of these types of equipment is appreciably higher among Nordic Skiers than it is among recent visitors to British Columbia and the American travelling public as a whole.

TABLE 26: EQUIPMENT OWNERSHIP	Nordic Skiers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(498)	(1,706)	(45,697)
Weighted, Projected <i>In rank order by Nordic Skiers</i>	1,567,000	5,340,000	166,003,000
Canoe/kayak	28%	12%	8%
Motor boat	20%	15%	14%
Motor home, camper, RV	18%	17%	13%
All-terrain vehicle (ATV)	16%	9%	11%
Snowmobile	11%	4%	3%
Sailboat	8%	4%	2%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, Table 45. "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 ³⁴	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.

³⁴ 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 traveling or touring (not a camping trip)
Camping/Tents or RVs	As above, excluding “A motor home or RV while traveling 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 traveling 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, Tables 2 to 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
Camping	15%	33%	10%	23%
Public campground	12%	27%	7%	17%
Private campground	6%	15%	4%	10%
Camp site in wilderness setting	4%	9%	2%	5%
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%
A 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, Tables 2 to 11. *Activities shown here are those that are named by at least 1-in-3 Nordic Skiers as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover. *Less than 0.5%.

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, Tables 2 to 11. *Activities shown here are those that are named by at least 1-in-3 Nordic Skiers as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.