



## **RESEARCH SERVICES**

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

#### **Focus on River Rafters**

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



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

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

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## I. Executive Summary

### **RIVER RAFTERS ARE A NICHE MARKET FOR BRITISH COLUMBIA.**

At 1-in-100 or 2.4 million of the 166.0 million U.S. overnight pleasure travellers, American River Rafters represent a relatively small *niche* market.

### **BRITISH COLUMBIA ATTRACTS RIVER RAFTERS AT A HIGHER THAN AVERAGE RATE.**

River Rafters represent about one percent of *all* U.S. overnight pleasure tourists but three percent (157,000) of the 5.3 million American adults with pleasure travel experiences in British Columbia over a two-year period.

### **RIVER RAFTERS LIVE IN JUST ABOUT EVERY U.S. STATE.**

For the most part, they mirror the distribution of the U.S. adult population and those who have taken overnight pleasure trips to any destination in the past two years although residents of **Mountain** states (e.g., Colorado, Utah, Nevada<sup>2</sup>) are especially likely to be River Rafters, possibly because of the availability of white water rivers in the area.

### **THE PACIFIC REGION IS A PARTICULARLY IMPORTANT MARKET FOR RIVER RAFTERS.**

Just as the province attracts about half of *all* its U.S. overnight pleasure tourists from California, Oregon and Washington, over half of American River Rafters who have been to British Columbia recently are residents of these three states, with about equal numbers coming from Washington (23%) and California (25%).

### **RIVER RAFTERS TEND TO BE MEN IN THEIR MID-TWENTIES THROUGH THEIR MID-FIFTIES.**

Men may predominate, but 4-in-10 River Rafters are women. All age groups are represented, but once a traveller reaches 55 years of age, he or she is unlikely to seek white water rafting experiences. Consistent with their ages, American River Rafters are parents (55%) or, less commonly, a partner in a couple (30%). They live in households of about three people, on average.

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<sup>2</sup> See Appendix for list of states in each U.S. Census Region.

**RIVER RAFTERS SPAN WIDE EDUCATION AND INCOME RANGES.**

About half are university educated, three-quarters are actively engaged in the labour force and two-fifths live in households with at least one person occupying an executive, managerial or professional position.

Their incomes reflect the fact that some River Rafters are at the early stages of their working years whereas others are at their career and earning peaks. Thus, about 3-in-10 have household incomes under \$60,000 and similar proportions are in the \$60,000 to under \$100,000 bracket and in the more affluent \$100,000+ bracket.

**ONE-FIFTH OF AMERICAN RIVER RAFTERS HAVE BEEN TO CANADA ON A RECENT OVERNIGHT PLEASURE TRIP.**

Canada emerges as a particularly attractive destination for white water enthusiasts. It attracts 22% of all American River Rafters compared to only about 1-in-8 *typical* U.S. pleasure tourists who have taken recent pleasure trips to Canada.

At the same time, Canada shares this distinction with countries outside North America and with many U.S. destinations. Mexico draws River Rafters at about the same rate (24%) as does Canada (22%). Even though River Rafters are more apt to travel outside the U.S.A. than are Americans in general, about one-half claim to have taken recent vacations *only* within their own country.

**ONTARIO IS THE PRINCIPLE CANADIAN COMPETITOR FOR THESE AMERICAN TRAVELLERS.**

Over a two-year period, **Ontario** attracted twice as many River Rafters (14%) as did British Columbia (7%). **Quebec** is also a source of competition within this market. It attracted about the same share of American River Rafters (6%) as did British Columbia (7%) over a two-year period.

**RIVER RAFTERS ARE DRAWN TO SUN/SEA DESTINATIONS.**

**Florida, California, Nevada** and **New York** are the most popular U.S. destinations for River Rafters when travelling outside their home state. These states represent stiff competition for British Columbia's river outfitters. Collectively, sun/sea states, including Florida, California, and Nevada attract about 7-in-10 River Rafters for overnight pleasure trips.

**A SAFE DESTINATION IS A PRIORITY.**

Most River Rafters start a trip planning process with a *destination* in mind although almost 3-in-10 of these rafters start their trip planning process with a focus on **activities**. This level of activity-driven planning is appreciably higher than is the case among typical U.S. tourists to British Columbia or in the American travel market as a whole. The destination should be *safe*, one that poses *no health concerns*, has *many things for adults to see and do* and offers *convenient access by car*.

**RIVER RAFTERS TEND TO BE OUTDOOR TOURISTS.**

There is considerable overlap between River Rafters and other outdoor sectors of interest to tourism businesses in British Columbia.<sup>3</sup> For example, about one-third of River Rafters are also **Campers/RVers, Alpine Skiers, and/or History/Heritage Tourists**. One-quarter correspond to the activity profile of **Self-Guided Overnight Touring Travellers**, or **Hikers** and one-fifth are **Anglers** and/or **Divers/Snorkellers**.

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

**MANY OUTDOOR EXPERIENCES ARE POPULAR AMONG RIVER RAFTERS.**

As their predisposition to go to sun/sea destinations might suggest, about one-third of River Rafters take trips in order to sunbathe, sit on a beach or swim in oceans. Their interest in seaside resorts may also be associated with their desire to have sun/sea tourism experiences. Other *water-based activities* that drive trips for about one-fifth of River Rafters include fishing, either in fresh water or, slightly less commonly, in salt water, swimming in lakes, and scuba diving or snorkelling, generally in oceans.

Their **land-based outdoor** interests include going to national or state/provincial nature parks where they might be found camping, taking a day hike or backpacking in wilderness settings on overnight trips, viewing the flora and fauna, or seeing natural wonders.

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<sup>3</sup>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.

While they may take trips to go white water rafting during the warm weather months, about one-third of River Rafters take trips in order to **alpine ski** or **snowboard** in the winter.

#### **RIVER RAFTERS ARE NOT ESPECIALLY DRIVEN TO TAKE CULTURAL, CULINARY OR SHOPPING TRIPS.**

By and large, River Rafters utilize destinations' cultural, culinary and retail infrastructure as *things to see and do* while on overnight pleasure trips rather than as the driving force behind their trips. Entertainment-oriented activities in general, and particularly theme parks, spectator sports events such as professional baseball or football games and pop or rock concerts are, however, trip motivators for sizeable minorities of River Rafters.

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

Like historic sites and museums, dining out at restaurants offering *local* ingredients and cuisine, other high-end dining experiences and going to wineries for tastings are much more common trip experiences (any) than trip drivers for River Rafters.

Shopping, especially for apparel, books or music and local arts and crafts, is a common trip pastime for River Rafters 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, followed by their own **past experience** (64%) and anecdotal information provided by **friends and relatives** (54%). About one-third rely on **maps, official DMO travel guides** and the same proportion use **newspapers** 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.

#### **RIVER RAFTERS WHO HAVE BEEN TO BRITISH COLUMBIA LOVE IT!**

River Rafters rate British Columbia about on par with Ontario and Quebec and significantly ahead of other provinces and the territories for overall appeal as a

vacation destination. And like the central Canadian provinces, about one-quarter of U.S. River Rafter refrain from rating British Columbia, presumably because they know too little about it to offer an opinion about its touristic appeal.

Direct experience seems to play an important role in British Columbia's image. Of the relatively few American River Rafter who have recently experienced what the province can offer, British Columbia achieves a rating of 8.9 out of ten – a rating on par with top-rated Hawaii.

Similarly, among the larger market of *all* Americans who have recently travelled to British Columbia, the province's overall appeal rating is dramatically higher (8.7) than that volunteered U.S. pleasure travellers (6.2) as a whole.

#### **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. River Rafter seem an ideal market for the province. But until more of them are aware of the rafting and *other* outdoor activities British Columbia can offer, they may not explore beyond competing rafting destinations in the U.S.

## TABLE OF CONTENTS

<b>I. Executive Summary.....</b>	<b>3</b>
<b>II. Introduction.....</b>	<b>10</b>
A. BACKGROUND AND OBJECTIVES.....	10
B. THE AMERICAN RIVER RAFTERS REPORT.....	11
<b>III. Overview of U.S. Tourism Activity Sectors .....</b>	<b>12</b>
A. THE U.S. PLEASURE TRAVEL MARKET TO BRITISH COLUMBIA .....	12
B. TOURISM ACTIVITY SECTOR SIZE .....	14
C. TOURISM ACTIVITY SECTOR CROSS-OVER.....	16
<b>IV. River Rafterers Market Profile.....</b>	<b>19</b>
A. REGIONAL AND DEMOGRAPHIC CHARACTERISTICS .....	19
1. <i>Place of Residence</i> .....	19
2. <i>Personal and Household Characteristics</i> .....	22
3. <i>Life Stage</i> .....	25
<b>V. Competitive Destinations.....</b>	<b>26</b>
A. WORLDWIDE DESTINATIONS FOR OVERNIGHT PLEASURE TRIPS .....	26
B. CANADIAN DESTINATIONS.....	28
C. OUT-OF-STATE U.S. PLEASURE TRAVEL DESTINATIONS .....	29
D. DESTINATIONS: ROLES & RATINGS.....	31
1. <i>Importance of Destination</i> .....	31
2. <i>Importance of Conditions in Destination Choice</i> .....	32
3. <i>Appeal of Various Destinations</i> .....	34
4. <i>Number of Good Reasons to Visit Various Destinations</i> .....	37
<b>VI. Activities On Overnight Trips .....</b>	<b>39</b>
A. INTRODUCTION.....	39
B. TRIP ACTIVITIES & DRIVERS.....	40
1. <i>River Rafterers' Cross-Over with Other Trip Activity Sectors</i> .....	40
2. <i>Major Trip Activity Groups</i> .....	42
3. <i>Individual Trip Activities: The Outdoors</i> .....	44
4. <i>Individual Trip Activities: Culture, Entertainment, Food/Wine, Shopping</i> .....	46
5. <i>Overnight Cruises &amp; Organized Group Tours</i> .....	49
<b>VII. Trip Planning.....</b>	<b>51</b>
A. WHO DOES THE PLANNING?.....	51
B. TRAVEL INFORMATION SOURCES & TRAVEL MEDIA .....	52
C. INTERNET USE FOR TRAVEL INQUIRIES & BOOKINGS .....	55
<b>VIII. Other Travel-Related Information.....</b>	<b>57</b>
A. USE OF PACKAGE DEALS.....	57
B. BENEFITS SOUGHT FROM PLEASURE TRAVEL .....	58
C. INCIDENCE OF SUMMER/WINTER TRIPS .....	60
D. MEMBERSHIPS IN VARIOUS ORGANIZATIONS .....	61
<b>IX. Appendices .....</b>	<b>62</b>
A. ABOUT THE TRAVEL ACTIVITIES AND MOTIVATION SURVEY (TAMS) .....	62
B. TRIP ACTIVITY SECTOR DEFINITIONS .....	63



C.	U.S. CENSUS REGIONS & STATES .....	65
D.	TNS CANADIAN FACTS “LIFESTAGES” DEFINITIONS .....	66
E.	TRIP ACTIVITIES – RECENT B.C. AND ANY DESTINATION PLEASURE TRAVELLERS .....	67

## 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).<sup>4</sup>

- **River Rafters**
- Sea Kayakers
- Backcountry Lodge Guests
- Cyclists/Mountain Bikers
- History and Heritage Tourists
- Snowmobilers
- Divers & Snorkellers
- Nordic Skiers & Other Non-Alpine Winter Sport Participants<sup>5</sup>
- Golfers
- Alpine Skiers
- Aboriginal Activity Tourists
- Anglers
- Self-Guided Overnight Touring Travellers
- Hikers
- Campers/RVers

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

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

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<sup>4</sup> See Appendix for a brief description of the TAMS study and the activities used to define each of the activity sectors.

<sup>5</sup> Throughout this report, *Nordic Skiers* is used as a convenient "short form" to cover travellers who claim to have taken trips for any of the following main reasons in the past two years: cross country skiing, ski touring, dog sledding, snow shoeing.

## B. The American River Rafters Report

This profile provides information about **American River Rafters**. For purposes of this report, these are American adults (18 years of age or over) who claim to have taken an overnight pleasure trip to any destination in the past two years and indicate that *white water rafting* was the main reason for at least one of the overnight trips they took over this same time period.<sup>6</sup>

People who take a trip *in order to* engage in white water rafting are only a fraction of tourists who go river rafting on their vacations. In fact, over five million Americans say they have had a white water rafting experience on trips taken over a two-year period. Of these 5.0 million American pleasure tourists, 2.4 million (48%) say they took a trip *in order to* raft on a river. These white water enthusiasts – those for whom the activity is the main reason for a trip – are the focus of this report because as the “dedicated” or “hard core” market, they represent a crystallization of the interests and characteristics that might attract more casual participants to the activity.

### Note to Readers

Activities and locations visited are independent of one another.

In other words, American River Rafters claim to have taken an overnight trip motivated by white water rafting 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, River Rafters may or may not have engaged in white water rafting in a particular country, province or state they have visited recently for an overnight pleasure trip.

The report provides the following information:

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

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<sup>6</sup> Since fieldwork for the TAMS study was conducted between January and June 2006, the “past two years” likely refers to 2004 and 2005. It is important to note, however, that when asked to report travel activities over a two-year period, consumers are prone to imprecision by focussing on “salient trips” (most memorable, most expensive, etc.) and/or by “telescoping” the specified time period (extending the time frame over which trips are reported beyond the specified two years). In light of this potential imprecision, a liberal interpretation of the “reference period” is advised. Throughout this report, the terms “past two years or so” and “recent” are commonly used to describe the “past two year” recall period.

### III. Overview of U.S. Tourism Activity Sectors

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

Tourism businesses in British Columbia are competing for the attention of about 166.0 million American adults who are in the market for overnight vacations (see Table A).<sup>7</sup> 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%).<sup>8</sup> 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	
<b><u>Overnight Trips to British Columbia</u></b>		
Any purpose, past 10 years	15,377,000	9%
Any purpose, past 2 years	6,933,000	4%
<b>Pleasure, past 2 years</b>	<b>5,340,000</b>	<b>3%</b>

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

Most of these recent U.S. visitors to the province – 5.3 million of them – were on vacation or pleasure trips. In other words, while tourism businesses in British Columbia may be competing for the attention of about 166.0 million American overnight pleasure travellers, they have attracted 1-in-33 (3%) of these tourists to the province over a two-year period.

<sup>7</sup> Adults are defined as individuals 18 years of age or older.

<sup>8</sup> 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 sectors<sup>9</sup> 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).<sup>10</sup>

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<sup>9</sup> 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.

<sup>10</sup> 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.<sup>11</sup> Examples of these niche markets include **River Rafter**, **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 <sup>1</sup>	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>					
					<b>Index</b>
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/RV'ers	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
<b>River Rafter</b>	<b>2,406,000</b>	<b>1%</b>	<b>157,000</b>	<b>3%</b>	<b>300</b>
Snowmobilers	1,712,000	1%	101,000	2%	200
Sea Kayakers	575,000	*	77,000	1%	333

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

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.

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

overnight pleasure tourists and considerably higher proportions of those who have recently visited British Columbia.

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

Based on this index, British Columbia is attracting Americans in **each** sector at an appreciably higher rate than they occur in the U.S. travelling public. Sectors over-represented at **three or more times** the expected rate include:

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

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

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

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

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

### **C. Tourism Activity Sector Cross-Over**

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

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

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



Chart A: Tourism Activity Sector Cross-Over							
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. River Rafters Market Profile

### A. Regional and Demographic Characteristics

#### 1. Place of Residence

There are about 2.4 million American adults who take vacations *in order to go white water rafting* (*River Rafters*). They represent 1-in-100 American travellers to *any destination* and about 1-in-33 of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so. They live in just about every one of the fifty states and for the most part, mirror the distribution of the U.S. adult population and those who have taken overnight pleasure trips to any destination in the past two years or so. Table 1 provides the place of residence by U.S. Census Regions and for individual states that emerge as noteworthy for River Rafters. For a list of the states in each of the U.S. Census Regions, please refer to the appendix.

- One-fifth of adult Americans live in the **South Atlantic** states and the same proportion of River Rafters reside in this region. Approximately 1-in-25 rafters are residents of North Carolina, Georgia and Florida (each).
- A further one-fifth of River Rafters reside in the **Pacific** region (19%), led by the region's most populous state – California (14%). California is, in effect, both the most populated state in the U.S. and also the single largest source of American River Rafters. These white water enthusiasts are slightly over-represented in California (14%) compared to the state's share of all U.S. adults (12%). At a much smaller scale, River Rafters are also slightly over-represented in the other two states in the region – Washington (3% River Rafters; 2% U.S. adult population) and Oregon (2% River Rafters; 1% U.S. adult population).

#### Recent River Rafters to British Columbia<sup>12</sup>

<b>Pacific Region</b>	<b>56%</b>
Washington	23%
Oregon	9%
California	25%

- As British Columbia's primary U.S. feeder region for overnight pleasure tourists, the Pacific region is a particularly important market for River Rafters. Just as the province attracts about half of *all* its U.S. overnight pleasure tourists from the

<sup>12</sup> Interpret with caution because of an extremely small base size (55). See Detailed Tabulations, Volume 2, page 42 for figures.

region, over half of American River Rafters who have been to British Columbia recently are residents of these three states, with about equal numbers coming from Washington (23%) and California (25%).

- River Rafters tend to be somewhat under-represented in eastern U.S. regions such as **Middle Atlantic** (10%) and **East North Central** (13%). Nonetheless, each of these regions is “home” to at least 1-in-10 River Rafters.
- Residents of the central plains states – **West North Central** – may have fewer opportunities for white water rafting in their own or nearby states than do other Americans. Whatever the reason, residents of this region are significantly under-represented among River Rafters (3%) relative to their share of *all* pleasure travellers and the U.S. adult population as a whole (7%). Similarly, residents of **West South Central**, and particularly Texas, are slightly under-represented among River Rafters.
- In contrast, residents of **Mountain** states are particularly likely to be River Rafters, possibly because of the availability of white water rivers in the area. This region, including Colorado and Utah, represents about 1-in-14 American overnight pleasure travellers (7%) but 1-in-10 River Rafters (10%).
- **New England** residents are also slightly over-represented among River Rafters. This region represents about 1-in-20 U.S. overnight pleasure travellers (5%) and 1-in-12 white water enthusiasts (8%).

<b>TABLE 1: PLACE OF RESIDENCE</b>	<b>River Rafter</b>	<b>All U.S. Pleasure Tourists</b>	<b>U.S. Population</b>
	<b>Total</b>	<b>To British Columbia</b>	<b>Any Destination (18+ Years)</b>
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<b>Incidence of River Rafter</b>	<b>100%</b>	<b>3%</b>	<b>1%</b>
<b>New England</b>	<b>8%</b>	<b>3%</b>	<b>5%</b>
Massachusetts	3%	1%	2%
<b>Middle Atlantic</b>	<b>10%</b>	<b>6%</b>	<b>14%</b>
New York	5%	3%	6%
<b>East North Central</b>	<b>13%</b>	<b>9%</b>	<b>16%</b>
Michigan	4%	2%	4%
Illinois	2%	3%	4%
Ohio	5%	2%	4%
<b>West North Central</b>	<b>3%</b>	<b>5%</b>	<b>7%</b>
<b>South Atlantic</b>	<b>20%</b>	<b>11%</b>	<b>19%</b>
Virginia	3%	2%	3%
North Carolina	4%	1%	3%
Georgia	4%	2%	3%
Florida	4%	5%	6%
<b>East South Central</b>	<b>7%</b>	<b>2%</b>	<b>6%</b>
<b>West South Central</b>	<b>9%</b>	<b>6%</b>	<b>11%</b>
Texas	6%	5%	7%
<b>Mountain</b>	<b>10%</b>	<b>7%</b>	<b>7%</b>
Colorado	3%	1%	2%
<b>Pacific</b>	<b>19%</b>	<b>50%</b>	<b>16%</b>
Washington	3%	20%	2%
Oregon	2%	6%	1%
California	14%	24%	12%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 42. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## 2. Personal and Household Characteristics

### Age & Gender

While every age group is represented among American River Rafter, they tend to be at the younger end of the age spectrum. About 1-in-6 are young adults (18 to 24 years) and about one-fifth are in their mid-twenties to mid-thirties, or mid thirties to mid-forties. Just over one-quarter of them are in the 45 to 54 year age group (see Table 2).

While River Rafter's 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 older end of the age spectrum. Specifically, almost half of the Americans who have recently taken an overnight pleasure trip to the province are 55 years of age or over but only one-seventh of the River Rafter market is at least 55 years old. Similarly, appreciably fewer River Rafter are 55 years of age or older (15%) than are found in the U.S. adult population as a whole (33%).

Men (58%) are somewhat more likely to be River Rafter than are women (42%), with younger men (18 to 34 years) representing about one-quarter of the market and younger women representing only about one-seventh.

TABLE 2: AGE & GENDER	River Rafter	All U.S. Pleasure Tourists		U.S. Population
	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(637)	(1,706)	(45,697)	(60,649)
Weighted, Projected	2,406,000	5,340,000	166,003,000	222,846,000
<b>Age</b>				
18 – 24 Years	16%	6%	11%	11%
25 – 34 Years	22%	15%	21%	20%
35 – 44 Years	21%	14%	17%	16%
45 – 54 Years	26%	21%	21%	21%
55 – 64 Years	10%	21%	16%	16%
65+ Years	5%	24%	14%	17%
<b>Gender</b>				
<b>Men</b>	<b>58%</b>	<b>53%</b>	<b>49%</b>	<b>49%</b>
18 – 34 Years	23%	11%	16%	16%
35 – 54 Years	25%	20%	18%	18%
<b>Women</b>	<b>42%</b>	<b>47%</b>	<b>52%</b>	<b>52%</b>
18 – 34 Years	15%	10%	16%	15%
35 – 54 Years	23%	16%	20%	19%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 38. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

### **Race, Education, Occupation, and Income**

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

River Rafter represent a broad range of incomes, reflecting, in part their wide age distribution – some are at the early stages of working years whereas others are at their career and earning peaks. About 3-in-10 River Rafter have household incomes under \$60,000 (30%), a similar proportion are in the \$60,000 to under \$100,000 bracket (35%) and in the more affluent \$100,000+ bracket (36%).

<b>TABLE 3: RACE, EDUCATION, OCCUPATION, INCOME</b>	<b>River Rafter</b>	<b>All U.S. Pleasure Tourists</b>		<b>U.S. Population</b>
		<b>To British Columbia</b>	<b>Any Destination</b>	<b>Adults (18+ Years)</b>
Unweighted base	Total (637)	(1,706)	(45,697)	(60,649)
Weighted, Projected	2,406,000	5,340,000	166,003,000	222,846,000
<b>Race</b>				
White	89%	87%	86%	84%
African American	1%	2%	6%	7%
Asian American	4%	4%	2%	2%
Other/Not stated	6%	7%	6%	7%
<b>Education</b>				
High school diploma or less	9%	9%	20%	26%
Some post-secondary	29%	23%	29%	29%
Post-secondary diploma or certificate	12%	9%	10%	10%
University degree+	49%	56%	39%	33%
<b>Labour Force Participant<sup>1</sup></b>	77%	62%	66%	61%
<b>Retirees</b>	6%	26%	15%	16%
<b>Executive/Manager /Professional<sup>2</sup></b>	41%	32%	30%	26%
<b>Household Income<sup>3</sup></b>				
Under \$40,000	15%	14%	27%	36%
\$40,000 - \$59,999	15%	16%	19%	18%
\$60,000 - \$99,999	35%	31%	30%	26%
\$100,000 - \$149,999	23%	22%	16%	12%
\$100,000+	36%	39%	24%	20%
\$150,000+	13%	17%	8%	6%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 34, 35, 36, 37.

<sup>1</sup> Labour force participant includes working full time, part time and self-employed. <sup>2</sup> Male or female head of household. <sup>3</sup> Note: 2005 household incomes have been re-percentage on total stating an income (US\$). "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

Tourists in this niche market tend to be more highly educated, more apt to occupy professional or managerial positions and to be more affluent than are typical American pleasure tourists. They more closely resemble the *typical* U.S. tourist to British Columbia in terms of education and income. Because they tend to be younger than the typical U.S. tourist to British Columbia, however, River Rafter are more apt to be engaged in the labour force and, in turn, to live in households with at least one person holding a professional or managerial position. In contrast, River Rafter are much less apt to be retired (6%) than are British Columbia's visitors from the U.S. as a whole (26%).

Compared to the U.S. adult population as a whole, River Rafter tend to have higher incomes, are more apt to be university graduates and to be in executive, managerial or professional jobs.



### 3. Life Stage

Consistent with their ages, American River Rafterers are parents (55%) or, less commonly, a partner in a couple (30%) (see Table 4). 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. More River Rafterers are at the young or middle parenting stage of life than are *typical* tourists to the province, with over half of them living in households with children of any age (*any parents*, 55%).

TABLE 4: HOUSEHOLD CHARACTERISTICS	River Rafterers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<b>HOUSEHOLD SIZE</b>			
1 person	10%	14%	12%
2 people	30%	46%	34%
3 person	20%	15%	19%
4 people	26%	14%	20%
5+ people	15%	9%	14%
Average (all ages)	3.1	2.6	3.0
<b>LIFESTAGE<sup>1</sup></b>			
Young singles	4%	3%	3%
Middle singles	5%	7%	6%
Older singles	1%	4%	3%
Young couple	15%	12%	11%
Working older couple	10%	18%	13%
Retired older couple	5%	16%	9%
Young parent	11%	7%	13%
Middle parent	15%	5%	11%
Older parent	29%	23%	28%
Any singles	10%	14%	12%
Any couples	30%	46%	34%
Any parent	55%	35%	51%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 39, 41.

<sup>1</sup>TNS 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. River Rafter indicated that they have taken recent vacations within the U.S.A. and about one-half claim to have travelled *only* within their own country (see Table 5). One-fifth of them have been to Canada on a recent overnight pleasure trip (22%), suggesting that Canada is a particularly attractive destination for white water enthusiasts. Why? Because only about 1-in-8 U.S. pleasure tourists as a whole have been to Canada recently (13%).

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

Key foreign competitive destinations for River Rafter include Mexico, the Caribbean and Europe. Mexico draws River Rafter at about the same rate (24%) as does Canada (22%) but noticeably fewer members of this niche market have taken recent pleasure trips to the Caribbean (16%) or Europe (13%).

#### Note to Readers

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

In other words, American River Rafter claim to have taken an overnight trip motivated by white water rafting 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, River Rafter may or may not have engaged in white water rafting in a particular country, province or state they have visited recently for an overnight pleasure trip.

**TABLE 5: COMPETITIVE DESTINATIONS  
WORLDWIDE\***

	River Rrafters	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<b>Canada</b>	<b>22%</b>	<b>100%</b>	<b>13%</b>
<b>U.S.A.</b>	<b>100%</b>	<b>100%</b>	<b>98%</b>
<b>Other Countries (NET)</b>	<b>41%</b>	<b>52%</b>	<b>26%</b>
Mexico	24%	27%	11%
South/Central America	4%	9%	3%
Caribbean	16%	24%	11%
Europe	13%	21%	7%
Australia/New Zealand	2%	3%	1%
Asia	5%	7%	2%
Africa	1%	2%	1%
<b>Destination patterns</b>			
<b>Only U.S.A.</b>	<b>50%</b>	<b>-</b>	<b>67%</b>
U.S.A. & Canada only	9%	48%	7%
U.S.A. & Mexico only	9%	-	5%
U.S.A. & Canada & Other Countries	13%	51%	5%
U.S.A. & Other Countries only (not Canada or Mexico)	13%	-	11%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 47.

\*Locations visited on overnight pleasure trip, past two years. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## B. Canadian Destinations

About one-seventh of American River Rafters have had some travel experience in British Columbia over a ten-year period (13%) and about half this proportion, or 1-in-14, are *recent* pleasure tourists in the province (7%) (see Table 6). As noted earlier, however, these River Rafters may or may not have engaged in white water rafting while on a trip to British Columbia or any other specific destination they claim to have visited recently.

**Ontario** is the principle Canadian competitor for these American travellers. Over a two-year period, this central Canadian province attracted twice as many River Rafters (14%) as did British Columbia. **Quebec** is also a source of competition within this market. It attracted about the same number of American River Rafters (6%) as did British Columbia (7%).

**TABLE 6: COMPETITIVE CANADIAN DESTINATIONS\***

	River Rafters	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<b>British Columbia</b>			
Any purpose, past 10 years	13%	100%	9%
Any purpose, past 2 years	8%	100%	4%
<b>Pleasure, past 2 years</b>	<b>7%</b>	<b>100%</b>	<b>3%</b>
<b>Overnight Pleasure Trips in Past 2 Years to . . .</b>			
Atlantic Canada	2%	8%	2%
Quebec	6%	9%	3%
Ontario	14%	17%	7%
Man/Sask	1%	7%	1%
Alberta	1%	15%	1%
Yukon	1%	9%	*

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 47.

\*Locations visited on overnight pleasure trip, past two years. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. \*Less than 0.5%

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

To identify key competitive destinations *within* the U.S., this analysis focuses on **out-of-state** overnight pleasure travel by American River Rafter (see Table 7). Information on visitation by these travellers to *all* states, including their “home state” can be found in the detailed tabulations.<sup>13</sup>

Whether for river rafting or any other tourism experience, River Rafter are drawn from their home state to **sun/sea** destinations within the U.S. at a high rate. Collectively, these destinations, including Florida, California, and Nevada attract about 7-in-10 River Rafter for overnight pleasure trips.

On a state-by-state basis, **Florida, California, Nevada** and **New York** are the most popular U.S. destinations for River Rafter when travelling outside their home state. As such, these states represent stiff competition for British Columbia’s river outfitters. It is worth noting that the *rank order* of favoured U.S. destinations is quite similar for River Rafter and for the entire U.S. pleasure travel market.

To assess the impact of state residents travelling *within* their own state, the U.S. destination choices of American River Rafter are show below *excluding* and *including* state residents for the U.S. market leaders. Not surprisingly, because of California’s sheer size and ample opportunities for white water rafting, the impact is most obvious for this state.

<u>Destinations</u>	<u>Excluding State Residents</u>	<u>Including State Residents</u> <sup>14</sup>
Florida	33%	36%
<b>California</b>	<b>22%</b>	<b>34%</b>
Nevada	21%	21%
New York State	21%	24%

When residents are included, this state captures one-third of the entire American rafting market (on trips that may or may not have included rafting). British Columbia will, needless to say, be competing with California as a rafting destination for California residents and for River Rafter from other U.S. states.

<sup>13</sup> See Volumes 1 – 4, Table 47.

<sup>14</sup> See above.

**TABLE 7: OUT-OF-STATE U.S. DESTINATIONS\* (Excluding "Own State")**

	<b>River Rafters</b>	<b>All U.S. Tourists</b>	
	Total	To British Columbia	Any Destination
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<b>Sun/Sea States (S)</b>	<b>69%</b>	<b>75%</b>	<b>54%</b>
<i>In rank order by River Rafters</i>			
Florida (S)	33%	25%	23%
California (S)	22%	32%	13%
Nevada (S)	21%	28%	14%
New York State	21%	19%	11%
Washington DC	17%	13%	7%
Colorado	16%	18%	7%
North Carolina	16%	9%	8%
Tennessee	16%	9%	9%
Arizona (S)	15%	23%	9%
New Jersey	12%	8%	6%
Georgia	11%	9%	8%
Hawaii (S)	11%	19%	6%
Illinois	11%	14%	8%
Massachusetts	11%	11%	6%
Pennsylvania	11%	12%	9%
South Carolina (S)	11%	7%	7%
Virginia	11%	9%	7%
West Virginia	12%	4%	3%
Texas (S)	10%	13%	7%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 48. \*Out-of-state locations visited on overnight pleasure trip, past two years. States displayed represent destinations visited by at least 10% of River Rafters. "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. River Rafters the first consideration in planning their most recent summer and/or winter trip was **destination** (60%) (see Table 8). At the same time, almost 3-in-10 of these rafters start their trip planning process with a focus on **activities** (28%). This level of activity-driven planning is appreciably higher than is the case among typical U.S. tourists to British Columbia (16%) or in the American travel market as a whole (13%). River Rafters also put a premium on destination choice *per se*, with 7-in-10 claiming that it is *extremely* or *very important* to them.

**TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION**

	River Rafters	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<b>First Consideration for Most Recent Summer/Winter Trip (NET)*</b>			
Start with destination	60%	72%	62%
Start with activities	28%	16%	13%
Start with type of vacation experience	23%	19%	20%
Look for package deal	2%	3%	2%
<b>Importance of Destination</b>			
Extremely/Very Important	70%	73%	67%
Extremely important	29%	31%	29%
Very important	42%	42%	39%
Average**	3.9	4.0	3.9

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 22, 24.

\*Based on respondents who reported taking a summer and/or winter overnight pleasure trip in past two years. \*\*Average based on assigned values of 5 for "extremely important" to 1 for "not at all important". Averages are calculated only on those volunteering an opinion. Percentages for "first consideration" do not add to 100% because not all response categories are shown. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## 2. Importance of Conditions in Destination Choice

Overnight pleasure travellers were asked to rate a variety of “conditions” in terms of their importance in making a destination choice. A three-point semantic scale was used.<sup>15</sup>

River Rafter 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, rafters put *feeling safe* at the top of their list (65%) (see Table 9).

About half of them also want a destination with *many things for adults to see and do* (51%) and two-fifths want the destination to offer *convenient access by car*. Consistent with their interest in feeling safe, River Rafter, like *all* U.S. tourists to any destination, want to travel in environments that pose *no health concerns* (39%).

### Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 River Rafter<sup>16</sup>

	River Rafter	U.S. Pleasure Tourists	
		To British Columbia	Total
Feeling safe	65%	67%	73%
Lots for adults to see/do	51%	50%	48%
Convenient access by car	42%	35%	51%
No health concerns	39%	40%	43%
Information available on internet	34%	28%	28%
Mid-range accommodation	33%	37%	33%

Availability of *information on the internet* and *mid-range lodging* are also salient factors in a destination choice for about 1-in-3 River Rafter. Their interest in the ability to obtain information via the internet is noticeably higher (34%) than is evident among *all* U.S. pleasure tourists (28%).

Other considerations deemed highly important among at least 1-in-4 River Rafter are the availability of *low cost packages*, *direct access by air* and *budget lodging*. While not as widely endorsed as many other considerations, availability of *camping* (16%) is much more prominent among River Rafter than it is among the general U.S. travelling public (9%) (see Table 9 on the following page for figures).

<sup>15</sup> “Highly important”, “Somewhat important”, and “Of no importance”.

<sup>16</sup> See Table 9 for full array of considerations deemed “highly important” and “of no importance”.



**TABLE 9: CONDITIONS FOR SELECTING A DESTINATION**

	<b>River Rafter</b>	<b>All U.S. Pleasure Tourists</b>	
	<b>Total</b>	<b>To British Columbia</b>	<b>Any Destination</b>
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<i><b>Bold rows</b> are proportion stating "Highly Important". In rank order by River Rafter,</i>			
<b>Feeling safe</b>	<b>65%</b>	<b>67%</b>	<b>73%</b>
Of no importance	4%	2%	2%
<b>Lots for adults to see/do</b>	<b>51%</b>	<b>50%</b>	<b>48%</b>
Of no importance	4%	4%	5%
<b>Convenient access by car</b>	<b>42%</b>	<b>35%</b>	<b>51%</b>
Of no importance	10%	12%	7%
<b>No health concerns</b>	<b>39%</b>	<b>40%</b>	<b>43%</b>
Of no importance	16%	14%	14%
<b>Information available on internet</b>	<b>34%</b>	<b>28%</b>	<b>28%</b>
Of no importance	18%	23%	24%
<b>Mid-range accommodation</b>	<b>33%</b>	<b>37%</b>	<b>33%</b>
Of no importance	10%	9%	13%
<b>Low cost packages available</b>	<b>30%</b>	<b>21%</b>	<b>32%</b>
Of no importance	18%	26%	18%
<b>Direct access by air</b>	<b>29%</b>	<b>34%</b>	<b>26%</b>
Of no importance	22%	14%	25%
<b>Budget accommodation</b>	<b>25%</b>	<b>22%</b>	<b>29%</b>
Of no importance	24%	27%	21%
<b>Familiar with culture &amp; language</b>	<b>18%</b>	<b>12%</b>	<b>23%</b>
Of no importance	24%	24%	17%
<b>Camping</b>	<b>16%</b>	<b>9%</b>	<b>8%</b>
Of no importance	48%	63%	65%
<b>Lots for children to see/do</b>	<b>15%</b>	<b>10%</b>	<b>20%</b>
Of no importance	56%	71%	55%
<b>Great shopping</b>	<b>11%</b>	<b>11%</b>	<b>16%</b>
Of no importance	43%	44%	36%
<b>Luxury accommodation</b>	<b>10%</b>	<b>9%</b>	<b>9%</b>
Of no importance	49%	48%	54%
<b>Convenient access by train/bus</b>	<b>10%</b>	<b>9%</b>	<b>8%</b>
Of no importance	52%	45%	54%
<b>Very different culture than own</b>	<b>10%</b>	<b>11%</b>	<b>8%</b>
Of no importance	44%	34%	48%
<b>Have friends or relatives there</b>	<b>7%</b>	<b>7%</b>	<b>14%</b>
Of no importance	68%	64%	55%
<b>Disabled-person-friendly</b>	<b>5%</b>	<b>8%</b>	<b>9%</b>
Of no importance	81%	77%	71%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 25. **Bold rows** are proportion stating "Highly Important". "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

### 3. Appeal of Various Destinations

American River Rafter are most enthusiastic about Hawaii as an *appealing destination* for pleasure travel, according this tropical state a rating of 8.7 on a ten-point scale (see Table 10).<sup>17</sup> Though significantly lower than Hawaii's, favourable ratings are accorded Colorado, California and Florida, followed by New York and Arizona. At 6.5, British Columbia is the highest rated *Canadian* destination but falls significantly short of River Rafter's appraisals of *every* U.S. destination included in the study.

Among Canadian destinations, River Rafter rate British Columbia about on par with Ontario and Quebec and significantly ahead of other provinces and the territories. And like the central Canadian provinces, about one-quarter of U.S. River Rafter refrain from rating British Columbia, presumably because they know too little about the destination to offer an opinion about its touristic appeal.

The impact of direct experience with a destination seems to play a role in American consumers' appraisals. For example, among Americans who have recently travelled to British Columbia, the province's overall appeal rating is dramatically higher (8.7) than that volunteered by River Rafter (6.5) or all U.S. pleasure travellers (6.2), most of whom have no direct experience with British Columbia.

#### Summary: Five Highest Appeal Destinations among River Rafter<sup>18</sup>

	River Rafter	U.S. Pleasure Tourists	
		To British Columbia	Total
1. Hawaii	8.7	8.5	8.4
2. Colorado	7.8	7.5	7.1
3. California	7.6	7.8	7.3
4. Florida	7.4	6.8	7.3
5. New York State	7.0	7.0	6.6
5. Arizona	7.0	7.0	6.6
<b>6. British Columbia</b>	<b>6.5</b>	<b>8.7</b>	<b>6.2</b>

<sup>17</sup> 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.

<sup>18</sup> See Table 10 for full array of average ratings and proportion unable/unwilling to rate each destination.

There are indications to suggest that British Columbia *delivers* a positive tourism experience for the comparatively few River Rafter who have experienced what the province can offer. In fact, among the small group of River Rafter who have been to British Columbia in the past two years or so, the province achieves a rating of 8.9, on par with Hawaii.<sup>19</sup> The challenge, of course, is getting these white water enthusiasts to the province!

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<sup>19</sup> See detailed tables, Volume 2, page 26-10 for figures. Interpret with caution because of extremely small base size.

**TABLE 10: APPEAL OF VARIOUS DESTINATIONS**

	River Rafter	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<b>Bold rows are average ratings*</b>			
<b>British Columbia</b>	<b>6.5</b>	<b>8.7</b>	<b>6.2</b>
No rating provided	26%	2%	31%
<b>Newfoundland &amp; Labrador</b>	<b>5.5</b>	<b>6.0</b>	<b>4.8</b>
No rating provided	40%	29%	42%
<b>Nova Scotia</b>	<b>5.9</b>	<b>6.7</b>	<b>5.5</b>
No rating provided	34%	24%	35%
<b>New Brunswick</b>	<b>5.2</b>	<b>6.1</b>	<b>4.9</b>
No rating provided	40%	31%	43%
<b>Prince Edward Island</b>	<b>6.0</b>	<b>6.9</b>	<b>5.6</b>
No rating provided	34%	25%	38%
<b>Quebec</b>	<b>6.2</b>	<b>6.8</b>	<b>5.8</b>
No rating provided	25%	18%	28%
<b>Ontario</b>	<b>6.4</b>	<b>6.8</b>	<b>6.1</b>
No rating provided	21%	19%	25%
<b>Manitoba</b>	<b>5.1</b>	<b>5.6</b>	<b>4.7</b>
No rating provided	41%	31%	43%
<b>Saskatchewan</b>	<b>5.2</b>	<b>5.6</b>	<b>4.8</b>
No rating provided	39%	29%	42%
<b>Alberta</b>	<b>5.8</b>	<b>6.8</b>	<b>5.2</b>
No rating provided	36%	22%	38%
<b>Yukon</b>	<b>5.8</b>	<b>6.3</b>	<b>5.1</b>
No rating provided	33%	24%	37%
<b>Northwest Territories</b>	<b>5.9</b>	<b>6.1</b>	<b>5.1</b>
No rating provided	29%	26%	36%
<b>New York State</b>	<b>7.0</b>	<b>7.0</b>	<b>6.6</b>
No rating provided	7%	8%	10%
<b>Colorado</b>	<b>7.8</b>	<b>7.5</b>	<b>7.1</b>
No rating provided	9%	8%	11%
<b>Florida</b>	<b>7.4</b>	<b>6.8</b>	<b>7.3</b>
No rating provided	3%	6%	6%
<b>California</b>	<b>7.6</b>	<b>7.8</b>	<b>7.3</b>
No rating provided	4%	3%	7%
<b>Hawaii</b>	<b>8.7</b>	<b>8.5</b>	<b>8.4</b>
No rating provided	5%	5%	8%
<b>Arizona</b>	<b>7.0</b>	<b>7.0</b>	<b>6.6</b>
No rating provided	6%	6%	10%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 26. \***Bold rows** are average ratings calculated using a ten-point bi-polar rating scale ranging from very appealing (10) to very unappealing (1). Averages are calculated on those volunteering a rating only. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

#### 4. Number of Good Reasons to Visit Various Destinations

Not too surprisingly, the *same* destinations accorded high *appeal* ratings are also the ones that emerge at the top of River Rafters' lists for having *many good reasons* to visit on a pleasure trip.<sup>20</sup> Specifically, Hawaii tops the list with about 3-in-4 rafters stating that there are many good reasons to go to this tropical destination (see Table 11). British Columbia is well down on the list, with only about 1-in-4 River Rafters claiming that there are *many* good reasons to go to this province.

Led by Hawaii, California, Florida, Colorado, New York and Arizona far surpass British Columbia as a destination with many reasons to visit according to River Rafters.

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

<u>River Rafters</u>		<u>U.S. Pleasure Tourists</u>			
		<u>To British Columbia</u>		<u>Total</u>	
Hawaii	73%	<b>British Columbia</b>	<b>73%</b>	Hawaii	67%
California	60%	Hawaii	72%	Florida	54%
Florida	56%	California	63%	California	53%
Colorado	54%				
		Less than One-Half			
New York	48%			Colorado	41%
Arizona	38%			New York	40%
<b>British Columbia</b>	<b>27%</b>			Arizona	31%
				<b>British Columbia</b>	<b>21%</b>

Among the comparatively few River Rafters who have recently travelled to British Columbia, however, more than 8-in-10 say that there are many good reasons to go (85%).<sup>22</sup> 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.

<sup>20</sup> 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*.

<sup>21</sup> 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.

<sup>22</sup> See Detailed Tables, Volume 2, page 27-4. Interpret with caution because of extremely small base size.

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

	<b>River Rafter</b>	<b>All U.S. Pleasure Tourists</b>	
		To British Columbia	Any Destination
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<i>% stating "MANY" good reasons to visit</i>			
<b>British Columbia</b>	<b>27%</b>	<b>73%</b>	<b>21%</b>
<i>Rank order among River Rafter</i>			
Hawaii	73%	72%	67%
California	60%	63%	53%
Florida	56%	45%	54%
Colorado	54%	46%	41%
New York State	48%	47%	40%
Arizona	38%	35%	31%
Ontario	22%	28%	20%
Quebec	21%	33%	18%
Northwest Territories	19%	20%	11%
Nova Scotia	17%	25%	13%
Prince Edward Island	17%	25%	13%
Yukon	17%	23%	11%
Newfoundland & Labrador	14%	16%	8%
Alberta	14%	27%	10%
New Brunswick	10%	16%	7%
Saskatchewan	9%	10%	6%
Manitoba	7%	9%	5%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 27. Proportions are those stating MANY good reasons to visit. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## VI. Activities On Overnight Trips

### A. Introduction

The 2006 TAMS questionnaire included approximately 190 activities a person may have engaged in while on a trip. In addition to capturing *incidence* of participation in this array of activities, the study asks consumers to indicate whether an activity they engaged in on *any* overnight trip in the past two years was a *main reason for taking any of these trips*.<sup>23</sup>

#### 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 **white water rafting** in the past two years, this activity is not linked to any specific destination they claim to have visited over the same time period. Thus, a trip prompted by rafting could have been on the Thompson River in British Columbia, the Colorado River in Utah or Arizona, or the Pigeon River in Tennessee. 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* River Rafter 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 River Rafter 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.

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<sup>23</sup> Presumably, "these trips" are those on which the specific activity took place.

## B. Trip Activities & Drivers

### 1. River Rafter's Cross-Over with Other Trip Activity Sectors

As demonstrated by their representation in other activity-based tourism sectors, River Rafter are multi-dimensional travellers.<sup>24</sup> About one-third of them are also **Campers/RVers, Alpine Skiers,** and/or **History/Heritage Tourists** (see Table 12). One-quarter of them correspond to the activity profile of **Self-Guided Overnight Touring Travellers,** or **Hikers** and one-fifth are **Anglers** and/or **Divers/Snorkellers.**

By indexing the share of River Rafter in each other activity sector to the American pleasure market in total, River Rafter's predisposition toward outdoor activities becomes very clear.

- Compared to the U.S. travelling public as a whole, River Rafter are at least **five times** as likely to be Sea Kayakers, Nordic Skiers, Divers/Snorkellers, Snowmobilers, Cyclists/Mountain Bikers and Alpine Skiers.
- They are also about **four times** as likely to take trips for Aboriginal culture and heritage experiences or to take self-directed touring trips as are typical American pleasure travellers.
- Rafter are three times more apt to take trips in order to camp or to fish than is the American travelling public as a whole.

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<sup>24</sup> 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 River Rafter 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**

	River Rafters	All U.S. Pleasure Tourists		
	Total (637)	To British Columbia (1,706)	Any Destination (45,697)	Index River Rafters to All U.S. Tourists
Unweighted base				
Weighted, Projected	2,406,000	5,340,000	166,003,000	
Rank order among River Rafters				
Campers/RVers	33%	16%	11%	300
Alpine Skiers	31%	13%	6%	517
History and Heritage Tourists	29%	22%	14%	207
Self-Guided Overnight Touring Travellers	26%	26%	11%	433
Hikers	26%	11%	6%	236
Anglers	20%	11%	8%	250
Divers & Snorkellers	19%	7%	3%	633
Cyclists/Mountain Bikers	12%	6%	2%	600
Aboriginal Activity Tourists	9%	9%	3%	450
Golfers	9%	7%	4%	300
Backcountry Lodge Guests	9%	4%	2%	225
Nordic Skiers	8%	5%	1%	800
Snowmobilers	6%	2%	1%	600
Sea Kayakers	4%	1%	*	1,333
River Rafters	100%	3%	1%	N/A

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 1. \*Less than 0.5%. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. These sectors were selected by Tourism British Columbia for the purposes of this report. This list does not represent the full range of sectors in the British Columbia tourism industry.

## 2. Major Trip Activity Groups

By definition, all River Rafterers are motivated to take overnight pleasure trips in order to engage in *white water rafting*. Consequently, they are all members of the more broadly defined **water-based outdoor activity** market. Like most tourists, however, River Rafterers take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.<sup>25</sup>

- In addition to taking trips in order to go white water rafting, 7-in-10 of these Americans take trips in order to engage in at least one **land-based outdoor activity** such as *camping*, *hiking*, *whale watching* or *viewing land-based animals* (see Table 13).
- About half of them have taken recent overnight pleasure trips in order to engage in a **cultural activity** such as going to well-known historic sites, museums, or cultural performances and the same proportion have been motivated by **entertainment** activities such as theme parks, casinos and movies.
- Alpine skiing, and to a lesser extent, other **outdoor winter activities** are trip drivers for almost two-fifths of the River Rafter market.
- **Resort** experiences, including seaside, mountain and lakeside properties motivate trips for about one-third of American River Rafterers. The same proportion take overnight pleasure trips in order to have a **camping** experience<sup>26</sup>, to go to **fairs or festivals** or to **spectator sporting events** such as professional baseball or football games.
- For about 1-in-4 River Rafterers, interests in dining and wine-related experiences have motivated recent overnight pleasure trips.

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, 9-in-10 River Rafterers *participated* in at least one land-based outdoor activity while on a recent overnight pleasure trip but 7-in-10 were motivated to take the trip by one of these activities.

Similarly, 8-in-10 River Rafterers went to a museum, gallery or cultural performance on a recent trip but only 5-in-10 of them took the trip in order to do so. Food and wine

<sup>25</sup> 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 River Rafterers 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.

<sup>26</sup> Included in land-based outdoor activities.

experiences are especially likely to be “one-of-many” trip activities (84%) but the driving force behind a trip for relatively few River Rafters (28%).

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

<u>Major Activity Group</u>	<u>Main Reason</u>		<u>Any Participation</u>	
	<b>River Rafters</b>	All U.S. Pleasure Tourists	<b>River Rafters</b>	All U.S. Pleasure Tourists
Outdoor Water Based	100%	30%	100%	56%
Outdoor Land Based	69%	30%	91%	63%
Cultural/Learning & Events	48%	23%	81%	61%
Theme/Amusement Parks/Movies	46%	22%	67%	43%
Outdoor Winter	38%	8%	46%	12%

These high levels of differentiation from *typical* American travellers, especially with respect to outdoor water and winter activities, are clear evidence of River Rafters’ distinctive tourism interests.

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

<b>TABLE 13: MAJOR ACTIVITY GROUPS – MAIN &amp; ANY</b>	<b>River Rafters’ Overnight Trip Activities</b>	
	<b>Main Reason</b>	<b>Any Participation</b>
Unweighted base	(637)	(637)
Weighted, Projected	2,406,000	2,406,000
<b>Outdoor Water Based Activities</b>	100%	100%
<b>Outdoor Land Based Activities</b>	69%	91%
<b>Camping</b>	32%	55%
<b>Cultural/Learning Activities &amp; Events</b>	48%	81%
<b>Theme/Amusement Parks/Movies (Entertainment)</b>	46%	67%
<b>Outdoor Winter Activities</b>	38%	46%
<b>Resorts</b>	34%	58%
<b>Fairs/Festivals</b>	31%	59%
<b>Spectator Sports</b>	30%	44%
<b>Food &amp; Wine</b>	28%	84%

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

### 3. Individual Trip Activities: The Outdoors

Many outdoor experiences are popular among River Rafters.<sup>27</sup> As their predisposition to go to sun/sea destinations might suggest, about one-third of them take trips in order to sunbathe, sit on a beach or swim in oceans (see Table 14). Over half of them have participated in these activities on a recent overnight pleasure trip even though the activities may not have been the reason they took the trip. Their interest in seaside resorts may also be associated with their desire to have sun/sea tourism experiences (Main, 19%; Any, 34%).

Other *water-based activities* that drive trips for about one-fifth of River Rafters include fishing, either in fresh water or, slightly less commonly, in salt water, swimming in lakes, and scuba diving or snorkelling, generally in oceans.

Their **land-based outdoor** interests include going to national or state/provincial nature parks where they might be found camping, taking a day hike or backpacking in wilderness settings on overnight trips, viewing the flora and fauna, or seeing natural wonders.

While they may take trips to go white water rafting during the warm weather months, about one-third of River Rafters take trips in order to **alpine ski or snowboard** in the winter. Almost all rafters who did any downhill skiing on recent trips (35%) took the trip(s) *in order to ski* (Main, 31%).

Compared to *all* U.S. overnight pleasure travellers, River Rafters are much more likely to identify *passive* outdoor activities such as sunbathing on a beach and *active* ones such

	<u>Main Reason</u>		<u>Any Participation</u>	
	River Rafters	All U.S. Pleasure Tourists	River Rafters	All U.S. Pleasure Tourists
<u>Outdoor Activities</u>				
Sunbathing or sitting on a beach	35%	13%	55%	29%
Swimming in oceans	31%	9%	58%	28%
Alpine skiing/snow boarding	31%	6%	35%	8%
Nature park	28%	10%	48%	27%
Camping - public campground	25%	7%	45%	17%
Fishing	21%	8%	34%	19%

<sup>27</sup> 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 River Rafters 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.

as alpine skiing or fishing as activities that *motivated* recent trips (main reason) or were engaged in on these trips (any participation).

These high levels of differentiation from *typical* American travellers are further evidence of River Rafters' 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*	River Rafters' Overnight Trip Activities	
	Main Reason	Any Participation
Unweighted base	(637)	(637)
Weighted, Projected	2,406,000	2,406,000
<i>In rank order by main reason within each subgroup</i>		
<b>Outdoors</b>		
Sunbathing or sitting on a beach	35%	55%
Swimming in oceans	31%	58%
Alpine skiing/snow boarding	31%	35%
Nature park	28%	48%
A public campground in national/state/provincial park	25%	45%
Fishing	21%	34%
Fresh water	15%	29%
Salt water	10%	17%
Swimming in lakes	21%	47%
Well known natural wonders	19%	42%
Scuba diving/snorkelling	19%	37%
Snorkelling in seas/oceans	14%	30%
Seaside resorts (lodging)	19%	34%
Hiking - same day excursion on overnight trip	18%	41%
Hiking/backpacking as an overnight trip	17%	23%
Flora/fauna viewing	16%	35%
Wildlife viewing – land based animals	10%	25%
Wildflowers/flora	8%	18%
Whale watching	8%	17%

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

\*Activities shown here are those that are named by at least 1-in-3 River Rafters 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, River Rrafters 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.<sup>28</sup> Entertainment-oriented activities in general, and particularly theme parks and pop or rock concerts are, however, trip motivators for many River Rrafters' trips (see Table 15). As noted previously, spectator sporting events are also common trip drivers, attracting about 3-in-10 River Rrafters.

##### Culture

River Rrafters are much more inclined to engage in a variety of cultural and heritage activities as "one-of-many" trip activities than they are to be motivated to take overnight pleasure trips in order to engage in these activities. For example, about half have strolled around a city to observe its buildings and architecture on a recent pleasure trip but only about 1-in-6 have taken a trip in order to do so (Main, 17%; Any, 51%). Similar patterns are evident for seeing well-known historic sites and going to general history museums.

##### Entertainment

Entertainment-oriented activities are much more likely to have motivated River Rrafters to take trips than are cultural activities. These rafters are especially drawn by amusement parks (Main, 41%; Any, 57%), and, to a lesser extent, by casinos (Main, 26%; Any, 50%). Rock or popular music concerts are also relatively widespread forms of entertainment for River Rrafters (Main, 21%; Any, 33%), followed by aquariums, water theme parks, and zoos. Taking in a movie is a common trip experience for River Rrafters but is noticeably less likely to have been a recent trip *driver* for these tourists.

##### Food & Wine

Similar to movies, dining out at restaurants offering *local* ingredients and cuisine (Main, 13%; Any, 69%), other high-end dining experiences (Main, 8%; Any, 39%), visiting local outdoor cafes (Main, 6%; Any, 47%) and going to wineries for tastings as day excursions (Main, 9%; Any, 32%) are much more common trip experiences (any) than trip drivers for River Rrafters.

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<sup>28</sup> 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 River Rrafters provided in this chapter are appended. For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

### **Shopping**

Shopping, especially for apparel, books or music and local arts and crafts, is a common trip pastime for River Rafter 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, River Rafter are much more likely to engage in outdoor activities or take trips for these activities. While not to the same extent, these white water enthusiasts are also more likely than the *typical* American pleasure traveller to identify a wide range of cultural, entertainment and dining activities as ones that *motivated* recent trips (main reason) or were engaged in on these trips (any participation).

	<b><u>Main Reason</u></b>		<b><u>Any Participation</u></b>	
		All U.S.		All U.S.
<b><u>Other Activities</u></b>	River	Pleasure	River	Pleasure
	Rafters	Tourists	Rafters	Tourists
Strolling in a city to see architecture	17%	7%	51%	34%
Well known historic sites	16%	8%	50%	30%
Amusement parks	41%	18%	57%	34%
Casinos	26%	14%	50%	36%
Restaurants - local ingredients/recipes	13%	6%	69%	58%
Shopping - Clothing, shoes, jewellery	10%	5%	62%	50%

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\***

	<b>River Rafter's Overnight Trip Activities</b>	
	<b>Main Reason</b>	<b>Any Participation</b>
Unweighted base	(637)	(637)
Weighted, Projected	2,406,000	2,406,000
<i>In rank order by main reason within each subgroup</i>		
<b>Cultural &amp; Heritage</b>		
Strolling around a city to observe buildings & architecture	17%	51%
Well known historic sites	16%	50%
Museums - general history	10%	33%
<b>Entertainment</b>		
Amusement parks	41%	57%
Casino	26%	50%
Rock & roll/popular concerts	21%	33%
Aquariums	16%	38%
Water theme parks	16%	33%
Zoos	16%	37%
Farmers' markets or country fairs	11%	33%
Movies/cinemas	9%	47%
<b>Food &amp; Wine</b>		
Dining – restaurants offering local ingredients and recipes	13%	69%
Dining - other high-end (not with international reputation)	8%	39%
Local outdoor cafes	6%	47%
Wine tasting (day visit)	9%	32%
<b>Shopping</b>		
Clothing, shoes, jewellery	10%	62%
Bookstores or music stores	8%	53%
Local arts & crafts studios	8%	45%
Antiques	6%	39%

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

\*Activities shown here are those that are named by at least 1-in-3 River Rafter 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 River Rrafters are not recent overnight cruise passengers or organized overnight tour participants (see Table 16). Of the 3-in-10 who have taken an overnight cruise in the past two years or so, Caribbean destinations are much more common (15%) than is Alaska – a cruise destination that might bring the tourist into the vicinity of British Columbia (5%).

Equal proportions of River Rrafters claim to have taken an **organized** overnight group tour (25%) and to have taken **self-directed** touring trips over a two-year period (25%). Those who have gone on an overnight organized tour are equally likely to have been to only one destination as to have made multiple stops on the tour.

Taking a day tour while on an overnight trip (43%) is about as characteristic of River Rrafters as is taking any type of overnight tour (42%) but rafters are somewhat more inclined to take self-directed day tours (32%) than organized ones (25%). Favoured themes for organized day excursions include tours around the countryside, around a city, sightseeing cruises and wilderness or outdoor tours. These same themes are equally popular among River Rrafters who take *self-directed* day touring excursions.<sup>29</sup>

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<sup>29</sup> See Detailed Tabulations, Volumes 1, 4 page 13-2 for figures.

TABLE 16: CRUISES/GROUP TOURS	River Rrafters	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<b>Took any overnight cruise in past 2 years</b>	<b>29%</b>	<b>49%</b>	<b>17%</b>
<b>Type of Cruise/Destination</b>			
Ocean - Alaska	5%	29%	3%
Ocean - Caribbean	15%	19%	9%
Ocean - Other	8%	15%	5%
Great Lakes	4%	1%	*
<b>Overnight Touring (NET)</b>	<b>42%</b>	<b>48%</b>	<b>20%</b>
Organized Tour	25%	32%	12%
Multiple Location	17%	26%	8%
Single Location	14%	16%	7%
Self-Directed Touring	26%	26%	11%
<b>Same-Day Touring on Overnight Trip (NET)</b>	<b>43%</b>	<b>57%</b>	<b>30%</b>
Self-Directed Touring	32%	38%	20%
Organized Excursion	25%	43%	19%
<b>Type of Organized Day Tour</b>			
<i>Among Organized Day Tour Takers</i>	(100%)	(100%)	(100%)
Countryside	51%	60%	42%
City	59%	69%	54%
Airplane/helicopter (pilot or passenger)	10%	16%	6%
Sightseeing cruise (day excursion)	46%	50%	34%
Wineries	27%	21%	13%
Factory	11%	14%	7%
Casino	19%	18%	14%
Wilderness/outdoor	50%	45%	26%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 12/ 14.

\*Less than 0.5%. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## VII. Trip Planning

### A. Who Does the Planning?

Almost all River Rafter claim to have *personal involvement* in trip planning for **all** or **most** trips planned over the past two years (see Table 17).

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

TABLE 17: TRAVEL PLANNING	River Rafter	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<b>Frequency of personal involvement in trip planning, past 2 years</b>			
All	59%	69%	65%
Most	24%	18%	15%
Some	9%	10%	10%
None/not stated	7%	4%	10%
<b>Main responsibility for trip planning</b>			
Respondent	43%	41%	39%
Spouse/partner	14%	20%	17%
Shared with other household member	27%	26%	25%
Other/not stated/not involved in travel planning	17%	13%	19%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 16, 17.  
 "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## B. Travel Information Sources & Travel Media

Of the many sources of travel information available to River Rafters, the **internet** tops the chart (see Table 18). Over 8-in-10 of these tourists rely on the internet for travel information, followed by their own **past experience** (64%) and anecdotal information provided by **friends and relatives** (54%). About one-third rely on **maps**, **official DMO travel guides** and the same proportion use **newspapers** 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 River Rafters are television advertisements and consumer travel shows or sportsmen's shows. Fewer than 1-in-10 River Rafters claim to rely on these sources of travel information.

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

(in rank order in each column)

<u>River Rafters</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 friends/relatives	Advice of friends/relatives	Advice of friends/relatives
Maps	Maps	
Newspapers	Official DMO travel guides	
Official DMO travel guides	Newspapers	
	Auto club	
	Travel agent	

With 8-in-10 River Rafters relying on the internet for travel planning and about 5-in-10 saying that they *normally* visit **travel websites**, the internet has the greatest reach for river outfitters in British Columbia. About one-third of American River Rafters also claim to watch **televised travel shows**, one-quarter say they frequently read **outdoor activities/sports magazines** such as *Backpacker* or *Outdoor Life* (24%) but only one-fifth say they are regular readers of **travel magazines** such as *Condé Nast* (19%).

Compared to recent American tourists to British Columbia, River Rafters are more likely to read affinity group magazines such as *Outdoor Life* and less inclined to read generic *travel* magazines.<sup>30</sup> Both of these types of magazines enjoy much more

<sup>30</sup> 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.

widespread popularity among River Rafter than they do within the general U.S. travelling public (11%, each).

One-fifth of River Rafter say they frequently read the **travel section** in their local newspaper's weekend (23%) and/or weekday edition (20%). This level of readership is about on par with U.S. overnight pleasure travellers as a whole, but somewhat lower than travel section readership among those who have recently travelled to British Columbia.

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

	<b>River Rrafters</b>	<b>All U.S. Pleasure Tourists</b>	
	<b>Total</b>	<b>To British Columbia</b>	<b>Any Destination</b>
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<i>In rank order by River Rrafters</i>			
<b>SOURCES OF TRAVEL PLANNING INFO</b>			
Internet website	83%	82%	68%
Past experience	64%	60%	49%
Advice of friends/relatives	54%	54%	41%
Maps	39%	49%	29%
Any newspaper	34%	40%	20%
Articles	29%	36%	16%
Advertisements	19%	20%	10%
Official DMO travel guides	34%	42%	18%
Auto club	31%	40%	22%
Visitor information centres	29%	28%	18%
Travel information in mail	26%	30%	14%
Travel agent	23%	38%	17%
Travel guide books	18%	30%	11%
Any television	16%	19%	8%
Programs	14%	17%	6%
Advertisements	5%	6%	4%
Electronic newsletters via e-mail	9%	12%	5%
Trade, travel, sportsmen's shows	5%	7%	2%
<b>TRAVEL MEDIA</b>			
<b>Frequently read newspaper Travel Section</b>			
In weekday editions	20%	34%	16%
In weekend editions	23%	36%	20%
<b>Magazines read in typical month</b>			
Travel	19%	28%	11%
Outdoor activities/sports	24%	16%	11%
<b>Normally watch Travel Shows on TV</b>			
Normally visit Travel websites	54%	57%	39%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 18, 28, 29, 30, 32. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover. See Tables 36 – 41.

### **C. Internet Use for Travel Inquiries & Bookings**

As noted in the previous section, almost all American River Rrafters and tourists who have taken a recent pleasure trip to British Columbia rely on the internet for travel planning. Two-thirds of River Rrafters who use the internet for travel planning explore travel sites such as *Expedia* or *Travelocity* and over half go to airline and hotel/resort sites (see Table 19). Destination marketing organization sites are used by slightly fewer of these tourists.

Not surprisingly, **booking** on-line (64%) is somewhat less common than is searching for information on the internet (83%). Nonetheless, almost 2-in-3 River Rrafters 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.

**TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING**

	<b>River Rafter</b>	<b>All U.S. Pleasure Tourists</b>	
	<b>Total</b>	<b>To British Columbia</b>	<b>Any Destination</b>
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<b>Used Internet website for travel planning, past 2 years</b>	<b>83%</b>	<b>82%</b>	<b>68%</b>
	(100%)	(100%)	(100%)
<b><u>Internet website(s) used</u></b> (Among Users)			
Travel planning/booking	67%	68%	56%
Hotel/resort	59%	66%	53%
Airline	56%	67%	46%
Destination marketing organization	49%	50%	35%
Attraction	41%	40%	33%
Cruise	18%	35%	12%
Motorcoach	2%	3%	1%
Other	32%	31%	25%
<b>Any Internet Purchases in Past 2 Years</b> (Among All Overnight Pleasure Travellers)	<b>64%</b>	<b>68%</b>	<b>47%</b>
	(100%)	(100%)	(100%)
<b><u>Items Purchased On-Line</u></b> (Among Purchasers)			
Air tickets	81%	86%	71%
Accommodation	79%	77%	72%
Car rental	48%	55%	39%
Tickets for activities/attractions	42%	34%	27%
Package deal (2+ items)	25%	31%	18%
Rail, bus, boat tickets	21%	27%	12%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, pages 19, 20.  
 "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.



## VIII. Other Travel-Related Information

### A. Use of Package Deals

Purchase of package deals in the past two years is relatively uncommon among River Rafter (see Table 20). Only about 1-in-20 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-4 have used package deals for *one* or *some* of these trips (27%).

Most River Rafter who purchase packages want them to include accommodation, followed by transportation to the destination, 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	River Rafter	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<b>Frequency of Purchasing Packages in Past 2 Years</b>			
Most/all trips	6%	7%	5%
One/some trips	27%	42%	20%
No trips/not stated/not sure	67%	51%	75%
<b>Desired Components of Packages</b>			
(Among Purchasers of Packages)	(100%)	(100%)	(100%)
Transport to destination	86%	89%	85%
Transport at destination	70%	74%	67%
Accommodation	86%	96%	91%
Food and beverage	54%	52%	52%
Tickets for activities/attractions	70%	68%	62%
Other	23%	26%	22%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 21. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## B. Benefits Sought From Pleasure Travel

At the top of the list of benefits for taking pleasure or vacation trips among River Rafters are the trip's ability to provide a **break from the day-to-day** environment and to **relieve stress** (see Table 21). Three-quarters of this niche market attach a high level of importance to these attributes.<sup>31</sup> A vacation should also be the basis for lasting **memories**, help **enrich familial relationships** and provide opportunities to **see and do something new and different** according to three-fifths of River Rafters. These are the same benefits of vacations deemed to be highly important by recent American tourists to British Columbia.

### 5 Top Highly Important Benefits in Rank Order Among River Rafters, Recent Pleasure Tourists to British Columbia and Any Destination<sup>32</sup>

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

While not widely endorsed, **being physically challenged**<sup>33</sup> is deemed to be a highly important benefit of vacations for about one-quarter of River Rafters (23%). This is a much higher level of endorsement 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 River Rafters, recent visitors to British Columbia and *all* U.S. travellers. These less sought outcomes of vacations include renewal of non-family personal connections, stories, pampering, and, at the bottom of everyone's list, solitude and isolation.

<sup>31</sup> 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*.

<sup>32</sup> For full array, see Table 21.

<sup>33</sup> *To be challenged physically/feel physically energized.*

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

	<b>River Rafters</b>	<b>All U.S. Pleasure Tourists</b>	
	Total	To British Columbia	Any Destination
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<i>% Stating "Highly Important"</i>			
<i>In rank order by River Rafters</i>			
Break from day-to-day environment	75%	62%	72%
Relax/relieve stress	74%	62%	72%
Create lasting memories	64%	60%	58%
Enrich relationship with partner/children	60%	52%	55%
See/do something new/different	57%	59%	43%
No fixed schedule	53%	41%	53%
Keep family ties alive	40%	38%	46%
Enrich perspectives	37%	36%	23%
Knowledge of history, cultures, places	30%	36%	20%
Stimulate mind/intellectual challenge	26%	29%	19%
Physical challenge	23%	14%	12%
Renew personal connections (non-family)	18%	19%	19%
Stories to share	16%	13%	13%
To be pampered	15%	15%	15%
Solitude and isolation	14%	11%	12%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 23. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

### C. Incidence of Summer/Winter Trips

Almost all River Rrafters say that they have taken an overnight pleasure trip during the summer months (93%) and 3-in-4 have taken winter trips (75%) (see Table 22). Their *winter* travel is likely related to these travellers' interest in *sun/sea* activities and destinations (e.g., sitting on a beach) as well as their propensity to take alpine skiing trips.

TABLE 22: INCIDENCE OF SUMMER/ WINTER PLEASURE TRIPS	River Rrafters	All U.S. Pleasure Tourists	
		To British Columbia	Any Destination
Unweighted base	Total (637)	(1,706)	(45,697)
Weighted, Projected	2,406,000	5,340,000	166,003,000
<b>Took Overnight Pleasure Trip in Past 2 Years In . . .</b>			
Summer	93%	90%	82%
Winter	75%	81%	62%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 22. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

### D. Memberships in Various Organizations

Auto club membership is characteristic of approximately 5-in-10 River Rafter (see Table 23). About 4-in-10 of these tourists are members of a frequent flyer program and 3-in-10 hold memberships in a hotel or car rental loyalty program and/or sports club. At fewer than 2-in-10, membership in a nature or environmental club is not widespread among River Rafter. It is, however, significantly more common among these tourists (17%) than among recent visitors to British Columbia (9%) or the American travelling public as a whole (5%).

TABLE 23: MEMBERSHIPS	River Rafter	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(637)	(1,706)	(45,697)
Weighted, Projected <i>In rank order by River Rafter</i>	2,406,000	5,340,000	166,003,000
Auto club	52%	59%	43%
Frequent flyer program	42%	62%	31%
Hotel/car rental loyalty program	30%	40%	20%
Sports club	29%	26%	16%
Community service club	18%	18%	10%
Nature/environmental club	17%	9%	5%
Book/reading club	13%	13%	11%
Hobby club	12%	9%	6%
Travel club	8%	11%	4%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volumes 2, 4, page 33. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

## IX. Appendices

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

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

Alberta Tourism, Parks, Recreation and Culture <sup>34</sup>	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.

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<sup>34</sup> 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
<b>River Outfitters</b>	White water rafting
<b>Sea Kayaking</b>	Kayaking or canoeing — ocean
<b>Backcountry Lodges</b>	Remote or fly-in wilderness lodge Remote or fly-in wilderness outpost Wilderness lodge you can drive to by car
<b>Cycling/Mountain Biking</b>	Recreational cycling, same day excursion Cycling — as an overnight touring trip Mountain biking
<b>History and Heritage</b>	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
<b>Snowmobiling</b>	Snowmobiling — Day use on organized trail Snowmobiling — As an overnight touring trip
<b>Diving</b>	Scuba diving in lakes/rivers Scuba diving in sea/ocean Snorkelling in lakes or rivers Snorkelling in sea/ocean
<b>Nordic Ski/Related Activities</b>	Cross country skiing Cross country or back country skiing as an overnight touring trip Snow shoeing Dog sledding Ski Jouring

<b>Golfing</b>	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
<b>Alpine Skiing</b>	Downhill skiing
	Heli-skiing
	Snowboarding
<b>Aboriginal Activities</b>	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
<b>Fishing</b>	Fishing — fresh water
	Fishing — salt water
<b>Any Self-Guided Overnight Touring</b>	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
<b>Hiking/Trails</b>	Hiking — same day excursion while on a trip of one or more nights
	Hiking/Backpacking in wilderness settings with overnight camping or lodging
<b>Camping/RVing (NET)</b>	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)
<b>Camping/Tents or RVs</b>	As above, excluding “A motor home or RV while traveling or touring (not a camping trip)”
<b>Camping - Tents</b>	Camping as “Main” and use Tent/Tent Trailer
<b>Camping – RV</b>	Camping as “Main” and use Truck camper/van, Travel trailer/fifth wheel, or Motor Home/RV
<b>RVing (non-camping)</b>	
	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	East South Central
Maine	Kentucky
New Hampshire	Tennessee
Vermont	Mississippi
Massachusetts	Alabama
Connecticut	West South Central
Rhode Island	Oklahoma
Middle Atlantic	Arkansas
New York State	Texas
Pennsylvania	Louisiana
New Jersey	Mountain
South Atlantic	Montana
Maryland	Idaho
Delaware	Wyoming
Washington DC	Nevada
West Virginia	Utah
Virginia	Colorado
North Carolina	New Mexico
South Carolina	Arizona
Georgia	Pacific
Florida	Washington State
East North Central	Oregon
Wisconsin	California
Michigan	
Illinois	Alaska
Indiana	Hawaii
Ohio	
West North Central	
North Dakota	
South Dakota	
Minnesota	
Iowa	
Nebraska	
Kansas	
Missouri	

## **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	(45,697)	(45,697)	(1,706)	(1,706)
Weighted, Projected	166,003,000	166,003,000	5,340,000	5,340,000
Outdoor Water Based Activities	40%	68%	30%	56%
Outdoor Land Based Activities	50%	85%	30%	63%
Camping	15%	33%	10%	23%
Cultural/Learning Activities & Events	39%	87%	23%	61%
Theme/Amusement Parks/Movies (Entertainment)	22%	50%	22%	43%
Outdoor Winter Activities	19%	27%	8%	12%
Resorts	23%	54%	13%	32%
Fairs/Festivals	19%	57%	14%	41%
Spectator Sports	21%	41%	14%	27%
Food & Wine	22%	88%	13%	74%

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

**TABLE A2: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN & ANY\***

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

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

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

	Overnight Trip Activities - U.S. Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(45,697)	(45,697)	(1,706)	(1,706)
Weighted, Projected	166,003,000	166,003,000	5,340,000	5,340,000
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%
Entertainment				
Amusement parks	18%	35%	18%	34%
Casino	16%	50%	14%	36%
Rock & roll/popular concerts	8%	17%	6%	12%
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%
Food & Wine				
Dining – restaurants offering local ingredients and recipes	10%	73%	6%	58%
Dining - other high-end (not with international reputation)	6%	42%	3%	25%
Local outdoor cafes	4%	50%	2%	28%
Wine tasting (day visit)	10%	39%	3%	16%
Shopping				
Clothing, shoes, jewellery	7%	57%	5%	50%
Bookstores or music stores	5%	54%	3%	35%
Local arts & crafts studios	6%	55%	3%	34%
Antiques	5%	34%	3%	23%

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