



RESEARCH SERVICES

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

Focus on Sea Kayakers

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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
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The Canadian Tourism Commission	Tourism Saskatchewan
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I. Executive Summary

SEA KAYAKERS ARE A NICHE MARKET FOR BRITISH COLUMBIA.

At about one-half million, American Sea Kayakers represent less than 1-in-100 of the 166.0 million U.S. overnight pleasure travellers to any destination and just over 1-in-100 of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so.

BRITISH COLUMBIA ATTRACTS SEA KAYAKERS AT A HIGHER THAN AVERAGE RATE.

While a small niche market, Sea Kayakers are three times as likely to have travelled to British Columbia recently as would be expected given their share of the total U.S. pleasure travel market. At approximately 77,000, this sector represents about one percent of the 5.3 million American adults with pleasure travel experiences in British Columbia over a two-year period.

SEA KAYAKERS LIVE IN JUST ABOUT EVERY U.S. STATE.

For the most part, they mirror the distribution of the U.S. adult population and those who have taken overnight pleasure trips to any destination in the past two years. Not surprisingly, however, Sea Kayakers are concentrated in states where opportunities to participate in the sport are most prevalent – states with ocean frontage and warm climates. For example, one-fifth of them live in California and about one-quarter live in the South Atlantic states, including 1-in-10 that reside in Florida.

SEA KAYAKERS TEND TO BE MEN IN THEIR MID-TWENTIES TO MID-THIRTIES, OR MID-FORTIES TO MID-FIFTIES.

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

SEA KAYAKERS SPAN WIDE EDUCATION AND INCOME RANGES.

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

Their incomes reflect the fact that some Sea Kayakers 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, a similar proportion is in the \$60,000 to under \$100,000 bracket and two-fifths fall into the more affluent \$100,000+ bracket.

ONE-FIFTH OF AMERICAN SEA KAYAKERS HAVE BEEN TO CANADA ON A RECENT OVERNIGHT PLEASURE TRIP.

Canada emerges as a particularly attractive destination for kayaking enthusiasts. It attracts over one-quarter (28%) of all American Sea Kayakers, compared to only about 1-in-8 *typical* U.S. pleasure tourists with recent pleasure trips to Canada (13%).

At the same time, Canada shares this distinction with countries outside North America and with many U.S. destinations. Mexico, Europe and the Caribbean draw Sea Kayakers at about the same rate as does Canada. Even though Sea Kayakers are more apt to travel outside the U.S.A. than are Americans in general, about one-third claim to have taken recent vacations *only* within their own country.

ONTARIO IS THE PRINCIPLE CANADIAN COMPETITOR FOR THESE AMERICAN TRAVELLERS.

Over a two-year period, **Ontario** attracted as many Sea Kayakers (14%) as did British Columbia (13%). **Quebec** is also a source of competition within this market (11%).

SEA KAYAKERS ARE DRAWN TO SUN/SEA DESTINATIONS.

Florida, New York, California, and Massachusetts are the most popular U.S. destinations for Sea Kayakers when travelling outside their home state. These states represent stiff competition for British Columbia's kayaking businesses. Collectively, sun/sea states, including Florida, California, and Arizona attract about two-thirds of Sea Kayakers for overnight pleasure trips.

A SAFE DESTINATION IS A PRIORITY.

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

SEA KAYAKERS TEND TO BE OUTDOOR TOURISTS.

There is considerable overlap between Sea Kayakers and other outdoor sectors of interest to tourism businesses in British Columbia.² For example, about one-half of them are also **Divers/Snorkellers** and about one-third are **Hikers, Campers/RVers** and/or **Self-Guided Overnight Touring Travellers**. One-quarter of them correspond to the activity profile of **Alpine Skiers, History/Heritage Tourists** and/or **Anglers**.

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

MANY OUTDOOR EXPERIENCES ARE POPULAR AMONG SEA KAYAKERS.

As their predisposition to kayak and go to sun/sea destinations might suggest, Sea Kayakers are especially interested in other *water based travel experiences*. About half of them take trips in order to scuba dive or snorkel, and two-fifths 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. Fishing, in fresh or salt water, drives trips for about one-quarter of Sea Kayakers.

Their **land-based outdoor** interests include taking a day hike or backpacking in wilderness settings on overnight trips and going to national or state/provincial

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

nature parks where they might be found camping, viewing the flora and fauna, or seeing natural wonders.

While they may take trips to go ocean kayaking during the warm weather months, over one-quarter of Sea Kayakers take trips in order to **alpine ski or snowboard** in the winter.

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

By and large, Sea Kayakers 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, casinos, and spectator sports events such as professional baseball or football games are, however, trip motivators for sizeable minorities of Sea Kayakers.

Over 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 Sea Kayakers.

Shopping, especially for apparel, books or music and local arts and crafts, is a common trip pastime for Sea Kayakers 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 and about 5-in-10 use anecdotal information provided by **friends and relatives** and their own **past experience**. About two-fifths rely on **maps** and **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.

SEA KAYAKERS HAVE VERY FAVOURABLE IMPRESSIONS OF BRITISH COLUMBIA.

Sea Kayakers give British Columbia as favourable a rating as California and Colorado, and marginally higher than Florida's for overall appeal as a pleasure travel destination. At 7.7, British Columbia is the highest rated *Canadian* destination, enjoying a significantly more favourable *appeal* image than the closest Canadian runner-ups: Quebec (7.0), Nova Scotia (6.9) and PEI (6.9).

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. Sea Kayakers seem an ideal market for the province. At present, however, the province is attracting only about thirteen percent of this market, suggesting that until more of them are aware of the kayaking and *other* outdoor activities British Columbia can offer, they may not explore beyond competing destinations in the U.S. and elsewhere in the world.

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II. Introduction

A. Background and Objectives

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

Whether in its cities, towns or countryside, British Columbia clearly offers a wide array of tourism experiences and attracts tourists from many different sectors. By learning more about Americans who are in the market for some of these travel experiences, British Columbia's tourism businesses can more effectively target their products and marketing efforts to attract tourists.

To support these efforts, *Experiences B.C. Sector Development Program*, Tourism British Columbia (TBC) and other stakeholders selected the following array of activity-based sectors as the focus of a series of American tourist profiles based on the recently released 2006 Travel Activities and Motivation Survey (TAMS).³

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

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

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

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

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

B. The American Sea Kayakers Report

This profile provides information about **American Sea Kayakers**. 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 *kayaking or canoeing – ocean* was the main reason for at least one of the overnight trips they took over this same time period.⁵

Note to Readers

Activities and locations visited are independent of one another.

In other words, American Sea Kayakers claim to have taken an overnight trip motivated by kayaking 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, Sea Kayakers may or may not have been kayaking in a particular country, province or state they have visited recently for an overnight pleasure trip.

People who take a trip *in order to* engage in sea kayaking are only a fraction of tourists who go kayaking on their vacations. In fact, about four million Americans say they have had a sea kayaking experience on trips taken over a two-year period. Of these 4.0 million American pleasure tourists, 575,000 (15%) say they took a trip *in order to* kayak on ocean waters. These kayaking 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.

The report provides the following information:

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

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

III. Overview of U.S. Tourism Activity Sectors

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

Tourism businesses in British Columbia are competing for the attention of about 166.0 million American adults who are in the market for overnight vacations (see Table A).⁶ These individuals claim to have taken at least one overnight pleasure or vacation trip over a two-year period. They represent three-quarters of the 222.8 million adults who live in the U.S.A.

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

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

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

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

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

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

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

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

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

B. Tourism Activity Sector Size

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

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

TABLE B: OVERVIEW OF SELECTED SECTOR MARKET SIZE¹

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

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 1, page 1. *Less than 0.5%. ¹Sectors represent overnight pleasure travellers who name specific activities as the **main reason** for one or more overnight trips over a two-year period. These sectors were selected by Tourism British Columbia for the purposes of this report. This list does not represent the full range of sectors in the British Columbian tourism industry.

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

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

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

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

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

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

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

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

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

C. Tourism Activity Sector Cross-Over

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

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

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

Chart A: Tourism Activity Sector Cross-Over							
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. Sea Kayakers Market Profile

A. Regional and Demographic Characteristics

1. Place of Residence

At about one-half million, Sea Kayakers – American adults who take vacations *in order to go kayaking or canoeing on an ocean* – are a small niche market.¹¹ They represent less than 1-in-100 American overnight pleasure travellers to *any destination* and just over 1-in-100 of the 5.3 million Americans who have come to British Columbia for a vacation 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 Sea Kayakers. For a list of the states in each of the U.S. Census Regions, please refer to the appendix. These kayaking enthusiasts live in just about every one of the fifty states but not surprisingly, are apt to reside in states where opportunities to participate in the sport are most prevalent – states with ocean frontage and warm climates.

- The **Pacific** states are home to over 1-in-4 Sea Kayakers. Most of these coastal residents live in California (20%).
- One-quarter of Sea Kayakers live in the **South Atlantic** states, with about 1-in-10 residing in Florida.
- A further one-tenth reside in the **West South Central** region (9%), led by the region's most populated state and the one with ocean/gulf frontage – Texas (9%).

¹¹ The base size for Sea Kayakers is comparatively small (n = 158). As a consequence, the reader is advised to interpret differences between members of this activity sector and typical American pleasure travellers to British Columbia or any destination with caution. Large percentage differences between Sea Kayakers and the larger groups are necessary for apparent differences to be statistically significant.

TABLE 1: PLACE OF RESIDENCE	Sea Kayakers	All U.S. Pleasure Tourists	U.S. Population
		To British Columbia	Any Destination (18+ Years)
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
Incidence of Sea Kayakers	100%	1%	*
New England	7%	3%	5%
Massachusetts	3%	1%	2%
Middle Atlantic	15%	6%	14%
New York	4%	3%	6%
Pennsylvania	8%	1%	4%
New Jersey	4%	2%	3%
East North Central	7%	9%	16%
West North Central	5%	5%	7%
South Atlantic	25%	11%	19%
Washington D.C.	2%	2%	3%
North Carolina	4%	1%	3%
Georgia	3%	2%	3%
Florida	9%	5%	6%
East South Central	*	2%	6%
West South Central	9%	6%	11%
Texas	9%	5%	7%
Mountain	4%	7%	7%
Colorado	1%	1%	2%
Pacific	27%	50%	16%
Washington	5%	20%	2%
Oregon	2%	6%	1%
California	20%	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. *Less than 1%.

2. Personal and Household Characteristics

Age & Gender

While every age group is represented among American Sea Kayakers, they tend to be at the younger end of the age spectrum. About 1-in-7 are young adults (18 to 24 years) and over one-quarter are in their mid-twenties to mid-thirties, or mid-forties to mid-fifties. Approximately 1-in-10 are in their mid-thirties to mid-forties and about one-fifth are 55 years of age or older (see Table 2).

While Sea Kayakers' 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-fifth of the sea kayaking market is at least 55 years old.

Men (57%) are somewhat more likely to be Sea Kayakers than are women (43%), with younger men (18 to 34 years) representing about one-quarter of the market and younger women representing only about one-sixth.

TABLE 2: AGE & GENDER	Sea Kayakers	All U.S. Pleasure Tourists		U.S. Population
	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(158)	(1,706)	(45,697)	(60,649)
Weighted, Projected	575,000	5,340,000	166,003,000	222,846,000
Age				
18 – 24 Years	14%	6%	11%	11%
25 – 34 Years	27%	15%	21%	20%
35 – 44 Years	11%	14%	17%	16%
45 – 54 Years	27%	21%	21%	21%
55 – 64 Years	15%	21%	16%	16%
65+ Years	7%	24%	14%	17%
Gender				
Men	57%	53%	49%	48%
18 – 34 Years	24%	11%	16%	16%
35 – 54 Years	22%	20%	18%	18%
Women	43%	47%	52%	52%
18 – 34 Years	17%	10%	16%	15%
35 – 54 Years	15%	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 Sea Kayakers, like tourists who live in the U.S. as a whole, are white. Almost three-fifths are university educated, three-quarters are actively engaged in the labour force and over two-fifths live in households with at least one person occupying an executive, managerial or professional position (see Table 3).

Sea Kayakers 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 Sea Kayakers have household incomes under \$60,000 (29%), a similar proportion is in the \$60,000 to under \$100,000 bracket (31%) and two-fifths fall into the more affluent \$100,000+ bracket (40%).

TABLE 3: RACE, EDUCATION, OCCUPATION, INCOME	Sea Kayakers	All U.S. Pleasure Tourists		U.S. Population
		To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	Total (158)	(1,706)	(45,697)	(60,649)
Weighted, Projected	575,000	5,340,000	166,003,000	222,846,000
Race				
White	85%	87%	86%	84%
African American	*	2%	6%	7%
Asian American	3%	4%	2%	2%
Other/Not stated	11%	7%	6%	7%
Education				
High school diploma or less	9%	9%	20%	26%
Some post-secondary	25%	23%	29%	29%
Post-secondary diploma or certificate	4%	9%	10%	10%
University degree+	57%	56%	39%	33%
Labour Force Participant¹	73%	62%	66%	61%
Retirees	9%	26%	15%	16%
Executive/Manager /Professional²	44%	32%	30%	26%
Household Income³				
Under \$40,000	16%	14%	27%	36%
\$40,000 - \$59,999	13%	16%	19%	18%
\$60,000 - \$99,999	31%	31%	30%	26%
\$100,000 - \$149,999	24%	22%	16%	12%
\$100,000+	40%	39%	24%	20%
\$150,000+	17%	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.

¹ Labour force participant includes working full time, part time and self-employed. ² Male or female head of household. ³ Note: 2005 household incomes have been re-percentage on total stating an income (US\$). "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. *Less than 0.5%.

Tourists in this niche market tend to be more highly educated, more apt to occupy professional or managerial positions and to be more affluent than are typical American pleasure tourists. They more closely resemble the *typical* U.S. tourist to British Columbia in terms of education and income. Because they tend to be younger than the typical U.S. tourist to British Columbia, however, Sea Kayakers 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, they are much less apt to be retired (9%) than are British Columbia's visitors from the U.S. as a whole (26%).

Compared to the U.S. adult population as a whole, Sea Kayakers 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 Sea Kayakers are parents (49%) or, less commonly, a partner in a couple (34%). They live in households of about three people, on average. Their life stage and household size are very similar to *all* American tourists but, predictably in light of the age differences, differ from the U.S. market British Columbia attracts. Fewer Sea Kayakers are *retired older couples* than are *typical* tourists to the province.

TABLE 4: HOUSEHOLD CHARACTERISTICS	Sea Kayakers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
HOUSEHOLD SIZE			
1 person	11%	14%	12%
2 people	37%	46%	34%
3 person	20%	15%	19%
4 people	16%	14%	20%
5+ people	14%	9%	14%
Average (all ages)	2.9	2.6	3.0
LIFESTAGE¹			
Young singles	3%	3%	3%
Middle singles	7%	7%	6%
Older singles	2%	4%	3%
Young couple	13%	12%	11%
Working older couple	14%	18%	13%
Retired older couple	7%	16%	9%
Young parent	12%	7%	13%
Middle parent	7%	5%	11%
Older parent	30%	23%	28%
Any singles	11%	14%	12%
Any couples	34%	46%	34%
Any parent	49%	35%	51%

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

¹TNS definitions for these groups are appended to this report. No cross editing with other household composition variables was performed by Research Resolutions. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. Percentages do not add to 100% because some respondents refrained from answering the question.

V. 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. Sea Kayakers indicated that they have taken recent vacations within the U.S.A. and about one-third claim to have travelled *only* within their own country (see Table 5). Over one-quarter of them have been to Canada on a recent overnight pleasure trip (28%), suggesting that Canada is a particularly attractive destination for these paddling enthusiasts. Why? Because only about 1-in-7 U.S. pleasure tourists as a whole have been to Canada recently (13%).

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

Key foreign competitive destinations for Sea Kayakers include Mexico, the Caribbean and Europe. Mexico (32%), Europe (26%) and the Caribbean (24%) draw them at about the same rate as does Canada (28%).

Note to Readers

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

In other words, American Sea Kayakers claim to have taken an overnight trip motivated by kayaking 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, Sea Kayakers may or may not have done kayaking in a particular country, province or state they have visited recently for an overnight pleasure trip.

**TABLE 5: COMPETITIVE DESTINATIONS
WORLDWIDE***

	Sea Kayakers	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
Canada	28%	100%	13%
U.S.A.	97%	100%	98%
Other Countries (NET)	54%	52%	26%
Mexico	32%	27%	11%
South/Central America	12%	9%	3%
Caribbean	24%	24%	11%
Europe	26%	21%	7%
Australia/New Zealand	5%	3%	1%
Asia	7%	7%	2%
Africa	3%	2%	1%
Destination patterns			
Only U.S.A.	35%	-	67%
U.S.A. & Canada only	9%	48%	7%
U.S.A. & Mexico only	7%	-	5%
U.S.A. & Canada & Other Countries	18%	51%	5%
U.S.A. & Other Countries only (not Canada or Mexico)	16%	-	11%

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

Over one-quarter of American Sea Kayakers have had some travel experience in British Columbia over a ten-year period (28%) and about half this proportion, or 1-in-8, are *recent* pleasure tourists in the province (13%) (see Table 6). As noted earlier, however, these Sea Kayakers may or may not have engaged in ocean kayaking 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 as many Sea Kayakers (14%) as did British Columbia. **Quebec** is also a source of competition within this market (11%).

TABLE 6: COMPETITIVE CANADIAN DESTINATIONS*

	Sea Kayakers	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
British Columbia			
Any purpose, past 10 years	28%	100%	9%
Any purpose, past 2 years	16%	100%	4%
Pleasure, past 2 years	13%	100%	3%
Overnight Pleasure Trips in Past 2 Years to . . .			
Atlantic Canada	6%	8%	2%
Quebec	11%	9%	3%
Ontario	14%	17%	7%
Man/Sask	4%	7%	1%
Alberta	4%	15%	1%
Yukon	5%	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 Sea Kayakers (see Table 7). Information on visitation by these travellers to *all* states, including their “home state” can be found in the detailed tabulations.¹²

Whether for kayaking or any other tourism experience, Sea Kayakers 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 two-thirds of Sea Kayakers for overnight pleasure trips. On a state-by-state basis, **Florida, New York, California**, and **Massachusetts** and are the most popular U.S. destinations for Sea Kayakers when travelling outside their home state. As such, these states represent stiff competition for British Columbia’s kayaking businesses.

To assess the impact of state residents travelling *within* their own state, the U.S. destination choices of American Sea Kayakers 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 sea kayaking, the impact is most obvious for this state.

<u>Destinations</u>	<u>Excluding State Residents</u>	<u>Including State Residents</u> ¹³
Florida	30%	39%
New York State	23%	26%
California	20%	36%
Massachusetts	19%	21%

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

¹² See Volumes 1 – 4, Table 47.

¹³ See above.

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

	Sea Kayakers	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
Sun/Sea States (S)	67%	75%	54%
<i>In rank order by Sea Kayakers</i>			
Florida (S)	30%	25%	23%
New York State	23%	19%	11%
California (S)	20%	32%	13%
Massachusetts	19%	11%	6%
Arizona (S)	17%	23%	9%
Georgia	17%	9%	8%
Nevada (S)	17%	28%	14%
Washington D.C.	17%	13%	7%
Hawaii (S)	15%	19%	6%
Illinois	15%	14%	8%
Alaska	14%	31%	3%
Colorado	14%	18%	7%
North Carolina	13%	9%	8%
South Carolina (S)	13%	7%	7%
Washington	13%	29%	4%
Michigan	12%	9%	6%
Virginia	12%	9%	7%
Arkansas	11%	7%	4%
New Mexico (S)	11%	10%	4%
Tennessee	11%	9%	9%
Texas (S)	11%	13%	7%
Utah	11%	12%	4%
Maine	10%	6%	4%
New Jersey	10%	8%	6%
Ohio	10%	8%	7%
Pennsylvania	10%	12%	9%
Wyoming	10%	10%	3%

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 Sea Kayakers. "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. Sea Kayakers the first consideration in planning their most recent summer and/or winter trip was **destination** (57%) (see Table 8). At the same time, about one-quarter of these paddlers start their trip planning process with a focus on **activities** (25%) and one-fifth begin with the **type of vacation experience** they wish to have. The level of activity-driven planning is higher than is the case among typical U.S. tourists to British Columbia (16%) or in the American travel market as a whole (13%). Sea Kayakers also put a premium on destination choice *per se*, with 3-in-4 claiming that it is *extremely* or *very important* to them.

TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION	Sea Kayakers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
First Consideration for Most Recent Summer/Winter Trip (NET)*			
Start with destination	57%	72%	62%
Start with activities	25%	16%	13%
Start with type of vacation experience	20%	19%	20%
Look for package deal	1%	3%	2%
Importance of Destination			
Extremely/Very Important	75%	73%	67%
Extremely important	35%	31%	29%
Very important	40%	42%	39%
Average**	4.0	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.¹⁴

Sea Kayakers 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, kayakers put *feeling safe* at the top of their list (61%) (see Table 9).

About half of them also want a destination with *many things for adults to see and do* (47%) and one-third want the destination to offer *mid-range lodging* and *convenient access by car*. Consistent with their interest in feeling safe, Sea Kayakers, like *all* U.S. tourists to any destination, also want to travel in environments that pose *no health concerns* (33%).

Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 Sea Kayakers¹⁵

	Sea Kayakers	U.S. Pleasure Tourists To British Columbia	Total
Feeling safe	61%	67%	73%
Lots for adults to see/do	47%	50%	48%
No health concerns	33%	40%	43%
Mid-range accommodation	33%	37%	33%
Convenient access by car	33%	35%	51%

Availability of *information on the internet* (31%) and *direct air access* (27%) are salient factors in a destination choice for about 3-in-10 Sea Kayakers. Approximately one-fifth of these tourists identify *low cost travel packages*, *budget lodging*, and *familiarity with the culture and language* of the place they are visiting as *highly important* attributes in destination selection. Interestingly, the same proportion express interest in destinations very similar to their own in terms of language and culture (18%) and destinations that are *very different, culturally, than yours* (17%).

While not as widely endorsed as many other considerations, availability of *camping* (16%) is more prominent among Sea Kayakers than it is among the general U.S. travelling public (9%) (see Table 9 on the following page for figures).

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

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

TABLE 9: CONDITIONS FOR SELECTING A DESTINATION

	Sea Kayakers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
<i>Bold rows are proportion stating "Highly Important". In rank order by Sea Kayakers</i>			
Feeling safe	61%	67%	73%
Of no importance	3%	2%	2%
Lots for adults to see/do	47%	50%	48%
Of no importance	6%	4%	5%
Convenient access by car	33%	35%	51%
Of no importance	6%	12%	7%
No health concerns	33%	40%	43%
Of no importance	11%	14%	14%
Mid-range accommodation	33%	37%	33%
Of no importance	12%	9%	13%
Information available on internet	31%	28%	28%
Of no importance	25%	23%	24%
Direct access by air	27%	34%	26%
Of no importance	19%	14%	25%
Low cost packages available	19%	21%	32%
Of no importance	25%	26%	18%
Budget accommodation	19%	22%	29%
Of no importance	23%	27%	21%
Familiar with culture & language	18%	12%	23%
Of no importance	25%	24%	17%
Very different culture than own	17%	11%	8%
Of no importance	26%	34%	48%
Camping	16%	9%	8%
Of no importance	48%	63%	65%
Great shopping	13%	11%	16%
Of no importance	49%	44%	36%
Lots for children to see/do	12%	10%	20%
Of no importance	67%	71%	55%
Convenient access by train/bus	11%	9%	8%
Of no importance	51%	45%	54%
Luxury accommodation	9%	9%	9%
Of no importance	47%	48%	54%
Have friends or relatives there	8%	7%	14%
Of no importance	68%	64%	55%
Disabled-person-friendly	5%	8%	9%
Of no importance	80%	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 Sea Kayakers are most enthusiastic about Hawaii as an *appealing destination* for pleasure travel, according this tropical state a rating of 8.5 on a ten-point scale (see Table 10).¹⁶ Though significantly lower than Hawaii's, British Columbia achieves as favourable a rating as is accorded California and Colorado, and marginally higher than Florida. At 7.7, British Columbia is the highest rated *Canadian* destination, enjoying significantly more favourable ratings than the closest Canadian runner-ups: Quebec (7.0), Nova Scotia (6.9) and PEI (6.9).

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

The impact of direct experience with a destination seems to play a role in American consumers' appraisals. For example, among Americans who have recently travelled to British Columbia, the province's overall appeal rating is dramatically higher (8.7) than that volunteered by Sea Kayakers (7.7) or all U.S. pleasure travellers (6.2), most of whom have no direct experience with British Columbia.

Summary: Five Highest Appeal Destinations among Sea Kayakers¹⁷

	Sea Kayakers	U.S. Pleasure Tourists	
		To British Columbia	Total
Hawaii	8.5	8.5	8.4
California	7.8	7.8	7.3
British Columbia	7.7	8.7	6.2
Colorado	7.7	7.5	7.1
Florida	7.3	6.8	7.3

¹⁶ Two image questions associated with specific destinations were included in the TAMS study. One of these asked travellers to use a ten-point bi-polar rating scale ranging from *very appealing* (10) to *very unappealing* (1) to assess each destination's appeal for a pleasure trip. The second question associated with reasons to travel to a destination is discussed in the following chapter. Many potential tourists refrained from offering opinions about the Canadian destinations included in this question, presumably because they did not have sufficient information about the destination to form a clear image.

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

TABLE 10: APPEAL OF VARIOUS DESTINATIONS

	Sea Kayakers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
Bold rows are average ratings*			
British Columbia	7.7	8.7	6.2
No rating provided	24%	2%	31%
Newfoundland & Labrador	6.6	6.0	4.8
No rating provided	33%	29%	42%
Nova Scotia	6.9	6.7	5.5
No rating provided	28%	24%	35%
New Brunswick	6.2	6.1	4.9
No rating provided	43%	31%	43%
Prince Edward Island	6.9	6.9	5.6
No rating provided	31%	25%	38%
Quebec	7.0	6.8	5.8
No rating provided	14%	18%	28%
Ontario	6.6	6.8	6.1
No rating provided	15%	19%	25%
Manitoba	5.7	5.6	4.7
No rating provided	39%	31%	43%
Saskatchewan	6.0	5.6	4.8
No rating provided	34%	29%	42%
Alberta	6.7	6.8	5.2
No rating provided	33%	22%	38%
Yukon	6.4	6.3	5.1
No rating provided	28%	24%	37%
Northwest Territories	6.3	6.1	5.1
No rating provided	29%	26%	36%
New York State	7.1	7.0	6.6
No rating provided	3%	8%	10%
Colorado	7.7	7.5	7.1
No rating provided	3%	8%	11%
Florida	7.3	6.8	7.3
No rating provided	2%	6%	6%
California	7.8	7.8	7.3
No rating provided	2%	3%	7%
Hawaii	8.5	8.5	8.4
No rating provided	4%	5%	8%
Arizona	6.6	7.0	6.6
No rating provided	4%	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 Sea Kayakers' lists for having *many good reasons* to visit on a pleasure trip (see Table 11).¹⁸ Specifically, Hawaii tops the list with about 3-in-4 kayakers stating that there are many good reasons to go to this tropical destination. British Columbia is well down on the list, with only two-fifths of Sea Kayakers claiming that there are *many* good reasons to go to this province.

Led by Hawaii, Colorado, California and Florida far surpass British Columbia as a destination with many reasons to visit according to Sea Kayakers.

Summary: Destinations With At Least One-Half Saying *Many Good Reasons* to Visit (in rank order within each category)¹⁹

<u>Sea Kayakers</u>		U.S. Pleasure Tourists	
		<u>To British Columbia</u>	<u>Total</u>
Hawaii	74%	British Columbia	73%
Colorado	62%	Hawaii	72%
California	61%	California	63%
Florida	56%		
		Less than One-Half	
British Columbia	40%		
			Colorado 41%
			New York State 40%
			Arizona 31%
			British Columbia 21%

¹⁸ 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*.

¹⁹ See Table 11 for the full array of ratings. Note: to display British Columbia in the rank order sequence, some destinations beneath the 50% threshold are shown.

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

	Sea Kayakers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
<i>% stating "MANY" good reasons to visit</i>			
British Columbia	40%	73%	21%
<i>Rank order among Sea Kayakers</i>			
Hawaii	74%	72%	67%
Colorado	62%	46%	41%
California	61%	63%	53%
Florida	56%	45%	54%
New York State	38%	47%	40%
Quebec	35%	33%	18%
Arizona	33%	35%	31%
Nova Scotia	29%	25%	13%
Prince Edward Island	27%	25%	13%
Ontario	26%	28%	20%
Yukon	23%	23%	11%
Alberta	23%	27%	10%
Northwest Territories	22%	20%	11%
Newfoundland & Labrador	20%	16%	8%
New Brunswick	18%	16%	7%
Saskatchewan	11%	10%	6%
Manitoba	10%	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*.²⁰

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 **kayaking or canoeing in oceans** 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 kayaking could have been in British Columbia's Johnstone Strait, in Mexico's Sea of Cortez, or near the island of Elba in Italy. 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* Sea Kayakers 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 Sea Kayakers 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.

²⁰ Presumably, "these trips" are those on which the specific activity took place.

B. Trip Activities & Drivers

1. Sea Kayakers' Cross-Over with Other Trip Activity Sectors

As demonstrated by their representation in other activity-based tourism sectors, Sea Kayakers are multi-dimensional travellers.²¹ About one-half of them are also **Divers/Snorkellers** and about one-third are **Hikers, Campers/RVers** and/or **Self-Guided Overnight Touring Travellers** (see Table 12). One-quarter of them correspond to the activity profile of **Alpine Skiers, History/Heritage Tourists** and/or **Anglers**.

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

- Compared to the U.S. travelling public as a whole, Sea Kayakers are at least **five times** as likely to be River Rafters, Divers/Snorkellers, Nordic Skiers, Cyclists/Mountain Bikers, Snowmobilers, Hikers, and Backcountry Lodge Guests.
- They are also about **four times** as likely to take trips to do alpine skiing or obtain Aboriginal culture and heritage experiences as are typical American pleasure travellers.
- Kayakers are three times more apt to take trips in order to fish than is the American travelling public as a whole.

²¹ Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Sea Kayakers 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**

	Sea Kayakers	All U.S. Pleasure Tourists		
	Total	To British Columbia	Any Destination	Index Sea Kayakers to All U.S. Tourists
Unweighted base	(158)	(1,706)	(45,697)	
Weighted, Projected	575,000	5,340,000	166,003,000	
<i>Rank order among Sea Kayakers</i>				
Sea Kayakers	100%	1%	*	333
Divers & Snorkellers	48%	7%	3%	1,600
Hikers	39%	11%	6%	650
Campers/RVers	32%	16%	11%	291
Self-Guided Overnight Touring Travellers	30%	26%	11%	273
Alpine Skiers	28%	13%	6%	467
History and Heritage Tourists	28%	22%	14%	200
Anglers	26%	11%	8%	325
Cyclists/Mountain Bikers	19%	6%	2%	950
River Rafter	17%	3%	1%	1,700
Golfers	13%	7%	4%	325
Aboriginal Activity Tourists	12%	9%	3%	400
Backcountry Lodge Guests	11%	4%	2%	550
Nordic Skiers	11%	5%	1%	1,100
Snowmobilers	9%	2%	1%	900

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 Sea Kayakers are motivated to take overnight pleasure trips in order to engage in *kayaking or canoeing on oceans*. Consequently, they are all members of the more broadly defined **water-based outdoor activity** market. Like most tourists, however, Sea Kayakers take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.²²

- In addition to taking trips in order to go kayaking, almost 8-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*.
- About two-thirds of them have been motivated by **entertainment** activities such as theme parks, casinos and movies;
- Approximately one-half have taken recent overnight pleasure trips in order to engage in a **cultural activity** such as going to well-known historic sites, museums, or cultural performances.
- Alpine skiing, and to a lesser extent, other **outdoor winter activities** are trip drivers for almost two-fifths of the Sea Kayaker market.
- **Resort** experiences, including seaside, mountain and lakeside properties motivate trips for about one-third of American Sea Kayakers. The same proportion take overnight pleasure trips in order to have a **camping** experience²³, to go to **fairs or festivals**, to **spectator sporting events** such as professional baseball or football games or to have **dining and wine-related** experiences.

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, virtually all Sea Kayakers *participated* in at least one land-based outdoor activity while on a recent overnight pleasure trip (99%) but just under 8-in-10 were motivated to take the trip by one of these activities (78%).

Similarly, almost 9-in-10 Sea Kayakers 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 experiences are especially likely to be “one-of-many” trip activities (86%) but the driving force behind a trip for relatively few Sea Kayakers (34%).

²² Summary tables displaying the *main* and *any* activities information for **overnight pleasure tourists to British Columbia** and to **any destination** that correspond to the activity profiles of Sea Kayakers provided in this chapter are appended. For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

²³ Included in land-based outdoor activities.

Compared to *all* U.S. overnight pleasure travellers, Sea Kayakers 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>	
	Sea Kayakers	All U.S. Pleasure Tourists	Sea Kayakers	All U.S. Pleasure Tourists
Outdoor Water Based	100%	30%	100%	56%
Outdoor Land Based	78%	30%	99%	63%
Theme/Amusement Parks/Movies	65%	22%	91%	43%
Cultural/Learning & Events	53%	23%	88%	61%
Outdoor Winter	37%	8%	43%	12%

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

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

TABLE 13: MAJOR ACTIVITY GROUPS – MAIN & ANY	Sea Kayakers Overnight Trip Activities	
	Main Reason	Any Participation
Unweighted base	(158)	(158)
Weighted, Projected	575,000	575,000
Outdoor Water Based Activities	100%	100%
Outdoor Land Based Activities	78%	99%
Camping	31%	54%
Theme/Amusement Parks/Movies (Entertainment)	65%	91%
Cultural/Learning Activities & Events	53%	88%
Outdoor Winter Activities	37%	43%
Resorts	34%	59%
Fairs/Festivals	35%	59%
Spectator Sports	34%	47%
Food & Wine	34%	86%

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 Sea Kayakers (see Table 14).²⁴ As their predisposition to kayak and go to sun/sea destinations might suggest, they are especially interested in *water based travel experiences*:

- About half of them take trips in order to scuba dive or snorkel, and two-fifths take trips in order to sunbathe, sit on a beach or swim in oceans.
- At least 3-in-5 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, 21%; Any, 43%).
- Fishing, in fresh or salt water, drives trips for about one-quarter of Sea Kayakers.

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

While they may take trips to go ocean kayaking during the warm weather months, over one-quarter of Sea Kayakers take trips in order to **alpine ski or snowboard** in the winter. Almost all kayakers who did any downhill skiing on recent trips (32%) took the trip(s) *in order to* ski (Main, 28%).

Compared to *all* U.S. overnight pleasure travellers, Sea Kayakers are much more likely to identify *passive* outdoor activities such as sunbathing on a beach and *active* ones such as alpine skiing, diving or snorkelling, or fishing as activities that *motivated* recent trips (main reason) or were engaged in on these trips (any participation). [See the summary table on the following page.]

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

	<u>Main Reason</u>		<u>Any Participation</u>	
	Sea Kayakers	All U.S. Pleasure Tourists	Sea Kayakers	All U.S. Pleasure Tourists
<u>Outdoor Activities</u>				
Scuba diving/snorkelling	48%	3%	59%	12%
Sunbathing or sitting on a beach	43%	13%	61%	29%
Swimming in oceans	39%	9%	65%	28%
Alpine skiing/snow boarding	28%	6%	32%	8%
Fishing	27%	8%	45%	19%
Camping - public campground	22%	7%	46%	17%
Nature park	21%	10%	43%	27%

These high levels of differentiation from *typical* American travellers are further evidence of Sea Kayakers' 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*

	Sea Kayakers Overnight Trip Activities	
	Main Reason	Any Participation
Unweighted base	(158)	(158)
Weighted, Projected	575,000	575,000
<i>In rank order by main reason within each subgroup</i>		
Scuba diving/snorkelling	48%	59%
Snorkelling in seas/oceans	39%	51%
Sunbathing or sitting on a beach	43%	61%
Swimming in oceans	39%	65%
Hiking	39%	54%
Same day excursion on overnight trip	24%	47%
Hiking/backpacking as an overnight trip	22%	29%
Camping	31%	54%
In public campground in national/state/provincial park	22%	46%
Alpine skiing/snow boarding	28%	32%
Fishing	27%	45%
Salt water	18%	32%
Fresh water	18%	27%
Flora/fauna viewing	26%	50%
Whale watching	18%	37%
Wildlife viewing – land based animals	11%	24%
Bird watching	8%	24%
Wildflowers/flora	5%	24%
Nature park	21%	43%
Seaside resorts (lodging)	21%	43%
Cycling	19%	31%
Mountain biking	11%	16%
Recreational cycling	10%	22%
Swimming in lakes	17%	46%
Well known natural wonders	17%	42%

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 about 1-in-3 Sea Kayakers 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, Sea Kayakers utilize destinations' cultural, culinary and retail infrastructure as *things to see and do* while on overnight pleasure trips rather than as the driving force behind or motivation for their trips.²⁵ Entertainment-oriented activities in general, and particularly theme parks and casinos are, however, trip motivators for many Sea Kayakers' trips (see Table 15). As noted previously, spectator sporting events are also common trip drivers, attracting about 1-in-3 Sea Kayakers.

Culture

Sea Kayakers 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, over 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, 18%; Any, 58%). Similar patterns are evident for seeing well-known historic sites and going to general history museums. These tourists are about three times as likely to go to art galleries, general history and/or science and technology museums, and Aboriginal cultural events and sites *as one of their trip activities* as they are to make these attractions the driving force behind the trip.

Entertainment

Entertainment-oriented activities are much more likely to have motivated Sea Kayakers to take trips than are cultural activities. These paddlers are especially drawn by amusement parks (Main, 37%; Any, 53%), and, to a lesser extent, by casinos (Main, 21%; Any, 47%). Going to an aquarium is also relatively widespread among Sea Kayakers (Main, 18%; Any, 49%), followed by zoos and farmers' markets or country fairs. Taking in a movie is a common trip experience for Sea Kayakers 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, 19%; Any, 73%), other high-end dining experiences (Main, 5%; Any, 37%), visiting local outdoor cafes (Main, 11%; Any, 52%) and going to wineries for tastings as day excursions (Main, 12%; Any, 33%) are much more common trip experiences (any) than trip drivers for Sea Kayakers.

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

Shopping

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

	<u>Main Reason</u>		<u>Any Participation</u>	
		All U.S.		All U.S.
	Sea	Pleasure	Sea	Pleasure
<u>Other Activities</u>	Kayakers	Tourists	Kayakers	Tourists
Amusement parks	37%	18%	53%	34%
Casinos	21%	14%	47%	36%
Restaurants - local ingredients/recipes	19%	6%	73%	58%
Strolling in a city to see architecture	18%	7%	58%	34%
Well known historic sites	12%	8%	49%	30%
Wine tasting (day visit)	12%	3%	33%	16%
Shopping - Clothing, shoes, jewellery	10%	5%	50%	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*

	Sea Kayakers Overnight Trip Activities	
	Main Reason	Any Participation
Unweighted base	(158)	(158)
Weighted, Projected	575,000	575,000
<i>In rank order by main reason within each subgroup</i>		
Cultural & Heritage		
Strolling around a city to see architecture	18%	58%
Historic sites - well known	12%	49%
Historic sites -other	12%	42%
Art galleries	11%	34%
Museum - General history	10%	35%
Museum - Science or Technology	10%	33%
Any Aboriginal Culture/Events	12%	31%
Aboriginal heritage attractions (museums/interpretive centres)	6%	25%
Aboriginal arts and crafts	4%	15%
Entertainment		
Amusement park	37%	53%
Casino	21%	47%
Aquariums	18%	49%
Zoos	17%	36%
Farmers' markets or country fairs	12%	36%
Movies/cinemas	10%	38%
Firework displays	10%	32%
Food & Wine		
Dining – restaurants offering local ingredients and recipes	19%	73%
Wine tasting (day visit)	12%	33%
Local outdoor cafes	11%	52%
Dining - other high-end (not with international reputation)	5%	37%
Shopping		
Bookstores or music stores	11%	54%
Local arts & crafts studios	11%	51%
Clothing, shoes, jewellery	10%	50%
Antiques	4%	31%

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 Sea Kayakers 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 Sea Kayakers are not recent overnight cruise passengers or organized overnight tour participants (see Table 16). Of the 1-in-3 who have taken an overnight cruise in the past two years or so, destinations in the Caribbean, Alaska and other locations are about equally common.

Equal proportions of Sea Kayakers claim to have taken an **organized** overnight group tour (33%) as to have taken **self-directed** touring trips over a two-year period (30%). Those who have gone on an overnight organized tour do not display a strong preference for tours to *single* versus *multiple* destinations.

Taking a day tour while on an overnight trip (46%) is about as characteristic of Sea Kayakers as is taking any type of overnight tour (51%). As with overnight tours, kayakers are just as inclined to take self-directed day tours (35%) as they are to take organized ones (33%). Favoured themes for organized day excursions include sightseeing cruises, tours around a city and/or the countryside and wilderness or outdoor tours. These same themes are popular among Sea Kayakers who take *self-directed* day touring excursions although self-directed tours to wineries are more popular among those taking self-directed tours (43%) than those taking organized day excursions (26%).²⁶

²⁶ See Detailed Tabulations, Volumes 1, 4 page 13-2 for figures.

TABLE 16: CRUISES/GROUP TOURS	Sea Kayakers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
Took any overnight cruise in past 2 years	35%	49%	17%
Type of Cruise/Destination			
Ocean - Alaska	15%	29%	3%
Ocean - Caribbean	19%	19%	9%
Ocean - Other	13%	15%	5%
Great Lakes	5%	1%	*
Overnight Touring (NET)	51%	48%	20%
Organized Tour	33%	32%	12%
Multiple Location	27%	26%	8%
Single Location	20%	16%	7%
Self-Directed Touring	30%	26%	11%
Same-Day Touring on Overnight Trip (NET)	46%	57%	30%
Self-Directed Touring	35%	38%	20%
Organized Excursion	33%	43%	19%
Type of Organized Day Tour			
<i>Among Organized Day Tour Takers</i>	(100%)	(100%)	(100%)
Sightseeing cruise (day excursion)	76%	50%	34%
City	65%	69%	54%
Countryside	50%	60%	42%
Wilderness/outdoor	48%	45%	26%
Casino	29%	18%	14%
Wineries	26%	21%	13%
Airplane/helicopter (pilot or passenger)	24%	16%	6%
Factory	15%	14%	7%

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 Sea Kayakers claim to have *personal involvement* in trip planning for **all** or **most** trips planned over the past two years.

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

TABLE 17: TRAVEL PLANNING	Sea Kayakers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
Frequency of personal involvement in trip planning, past 2 years			
All	63%	69%	65%
Most	18%	18%	15%
Some	14%	10%	10%
None/not stated	6%	4%	10%
Main responsibility for trip planning			
Respondent	32%	41%	39%
Spouse/partner	13%	20%	17%
Shared with other household member	33%	26%	25%
Other/not stated/not involved in travel planning	22%	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 Sea Kayakers, the **internet** tops the chart (see Table 18). Over 8-in-10 of these tourists rely on the internet for travel information and about 5-in-10 use anecdotal information provided by **friends and relatives** and their own **past experience**. About two-fifths rely on **maps** and **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 Sea Kayakers are television advertisements and consumer travel shows or sportsmen's shows. Fewer than 1-in-10 Sea Kayakers claim to rely on these sources of travel information.

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

(in rank order in each column)

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

With 8-in-10 Sea Kayakers 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 kayak businesses in British Columbia. About one-third of American Sea Kayakers also claim to watch **televised travel shows**, frequently read **outdoor activities/sports magazines** such as *Backpacker* or *Outdoor Life* (30%) or general travel magazines such as *Condé Nast* (31%).

Compared to recent American tourists to British Columbia, Sea Kayakers are more likely to read affinity group magazines such as *Outdoor Life* and are as inclined to read generic *travel* magazines.²⁷ Both of these types of magazines enjoy much more

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

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

Between one-quarter and one-fifth of Sea Kayakers say they frequently read the **travel section** in their local newspaper's weekend (25%) and/or weekday edition (22%). 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

	Sea Kayakers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
<i>In rank order by Sea Kayakers</i>			
SOURCES OF TRAVEL PLANNING INFO			
Internet website	85%	82%	68%
Advice of friends/relatives	54%	54%	41%
Past experience	52%	60%	49%
Any newspaper	40%	40%	20%
Articles	33%	36%	16%
Advertisements	20%	20%	10%
Auto club	29%	40%	22%
Maps	37%	49%	29%
Official DMO travel guides	30%	42%	18%
Visitor information centres	27%	28%	18%
Travel agent	27%	38%	17%
Travel guide books	24%	30%	11%
Travel information in mail	23%	30%	14%
Any television	12%	19%	8%
Programs	12%	17%	6%
Advertisements	7%	6%	4%
Electronic newsletters via e-mail	12%	12%	5%
Trade, travel, sportsmen's shows	6%	7%	2%
TRAVEL MEDIA			
Frequently read newspaper Travel Section			
In weekday editions	22%	34%	16%
In weekend editions	25%	36%	20%
Magazines read in typical month			
Travel	31%	28%	11%
Outdoor activities/sports	30%	16%	11%
Normally watch Travel Shows on TV	37%	48%	29%
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 Sea Kayakers and tourists who have taken a recent pleasure trip to British Columbia rely on the internet for travel planning. Three-fifths of Sea Kayakers who use the internet for travel planning explore travel sites such as *Expedia* or *Travelocity*, airline and /or hotel/resort sites (see Table 19). Destination marketing organization sites are used by about two-fifths of these tourists.

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

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING

	Sea Kayakers	All U.S. Pleasure Tourists	
		To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
Used Internet website for travel planning, past 2 years	85%	82%	68%
	(100%)	(100%)	(100%)
<u>Internet website(s) used</u> (Among Users)			
Travel planning/booking	61%	68%	56%
Hotel/resort	58%	66%	53%
Airline	57%	67%	46%
Destination marketing organization	42%	50%	35%
Attraction	30%	40%	33%
Cruise	20%	35%	12%
Motorcoach	4%	3%	1%
Other	39%	31%	25%
Any Internet Purchases in Past 2 Years (Among All Overnight Pleasure Travellers)	69%	68%	47%
	(100%)	(100%)	(100%)
<u>Items Purchased On-Line</u> (Among Purchasers)			
Air tickets	83%	86%	71%
Accommodation	73%	77%	72%
Car rental	58%	55%	39%
Tickets for activities/attractions	31%	34%	27%
Package deal (2+ items)	26%	31%	18%
Rail, bus, boat tickets	22%	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 Sea Kayakers (see Table 20). Only about 1-in-12 say they relied on a package deal for *all* or *most* of their trips over the past two years or so (8%) and a further 1-in-3 have used package deals for *one* or *some* of these trips (36%).

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

TABLE 20: PACKAGE DEALS	Sea Kayakers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
Frequency of Purchasing Packages in Past 2 Years			
Most/all trips	8%	7%	5%
One/some trips	36%	42%	20%
No trips/not stated/not sure	56%	51%	75%
Desired Components of Packages (Among Purchasers of Packages)			
Transport to destination	(100%)	(100%)	(100%)
Accommodation	93%	89%	85%
Tickets for activities/attractions	87%	96%	91%
Transport at destination	75%	68%	62%
Food and beverage	68%	74%	67%
Other	52%	52%	52%
	35%	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 Sea Kayakers is the trip's ability to **relieve stress** (see Table 21). Three-quarters of this niche market attach a high level of importance to stress reduction and about three-fifths seek a **break from their day-to-day** realities, opportunities to **see and do something new and different**, and want the vacation to be the basis of lasting **memories**.²⁸ A holiday should also help **enrich familial relationships** according to three-fifths of Sea Kayakers. 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 Sea Kayakers, Recent Pleasure Tourists to British Columbia and Any Destination²⁹

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

While not widely endorsed, **being physically challenged**³⁰ is deemed to be a highly important benefit of vacations for about one-third of Sea Kayakers (34%). 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 Sea Kayakers, recent visitors to British Columbia and *all* U.S. travellers. These less sought outcomes of vacations include solitude and isolation, renewal of non-family personal connections, pampering, and stories to tell once the trip is over.

²⁸ Consumers were asked to indicate the importance they attach to a variety of possible *benefits* from pleasure travel using a three-point semantic scale ranging from *of no importance* to *highly important*. The figures presented in this section are the proportion of tourists who claim a benefit is *highly important*.

²⁹ For full array, see Table 21.

³⁰ *To be challenged physically/feel physically energized.*

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

	Sea Kayakers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
<i>% Stating "Highly Important"</i>			
<i>In rank order by Sea Kayakers</i>			
Relax/relieve stress	72%	62%	72%
Break from day-to-day environment	64%	62%	72%
See/do something new/different	64%	59%	43%
Create lasting memories	61%	60%	58%
Enrich relationship with partner/children	55%	52%	55%
No fixed schedule	52%	41%	53%
Enrich perspectives	46%	36%	23%
Keep family ties alive	44%	38%	46%
Knowledge of history, cultures, places	34%	36%	20%
Physical challenge	34%	14%	12%
Stimulate mind/intellectual challenge	30%	29%	19%
Renew personal connections (non-family)	23%	19%	19%
Solitude and isolation	19%	11%	12%
To be pampered	15%	15%	15%
Stories to share	11%	13%	13%

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 Sea Kayakers say that they have taken an overnight pleasure trip during the summer months (95%) and 3-in-4 have taken winter trips (78%) (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	Sea Kayakers	All U.S. Pleasure Tourists	
		To British Columbia	Any Destination
Unweighted base	Total (158)	(1,706)	(45,697)
Weighted, Projected	575,000	5,340,000	166,003,000
Took Overnight Pleasure Trip in Past 2 Years In . . .			
Summer	95%	90%	82%
Winter	78%	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 Sea Kayakers (see Table 23). About 4-in-10 of these tourists are members of a frequent flyer program and over 3-in-10 hold a sports club membership. About one-quarter of these kayakers claim to have memberships in a hotel or car rental loyalty program and/or nature or environmental club. Membership in a nature/environmental club is much more prevalent among Sea Kayakers (26%) than it is among recent visitors to British Columbia (9%) or the American travelling public as a whole (5%).

TABLE 23: MEMBERSHIPS	Sea Kayakers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(158)	(1,706)	(45,697)
Weighted, Projected <i>In rank order by Sea Kayakers</i>	575,000	5,340,000	166,003,000
Auto club	55%	59%	43%
Frequent flyer program	43%	62%	31%
Sports club	35%	26%	16%
Hotel/car rental loyalty program	28%	40%	20%
Nature/environmental club	26%	9%	5%
Community service club	21%	18%	10%
Book/reading club	15%	13%	11%
Hobby club	11%	9%	6%
Travel club	7%	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 ³¹	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.

³¹ Formerly *Alberta Economic Development*.

B. Trip Activity Sector Definitions

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

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

Golfing	Golfing — played an occasional game while on a trip
	Golfing — played during a stay at a golf resort for one or more nights
	Golfing — took a package golf tour to play on various courses
Alpine Skiing	Downhill skiing
	Heli-skiing
	Snowboarding
Aboriginal Activities	Aboriginal cultural experiences in a remote or rural setting where you stayed for one or more nights
	Aboriginal heritage attractions (e.g., museums, interpretive centres)
	Aboriginal festivals and events (e.g., Pow Wows)
	Aboriginal cuisine (tasted or sampled)
	Aboriginal arts and crafts shows
	Aboriginal outdoor adventure and/or sports
Fishing	Fishing — fresh water
	Fishing — salt water
Any Self-Guided Overnight Touring	A self-guided tour that was not part of an organized or guided group on which you stayed in different places for one or more nights
Hiking/Trails	Hiking — same day excursion while on a trip of one or more nights
	Hiking/Backpacking in wilderness settings with overnight camping or lodging
Camping/RVing (NET)	A public campground in a national, state, provincial or municipal park
	A private campground
	A camp site in a wilderness setting (not a campground)
	A motor home or RV while traveling or touring (not a camping trip)
Camping/Tents or RVs	As above, excluding “A motor home or RV while traveling or touring (not a camping trip)”
Camping - Tents	Camping as “Main” and use Tent/Tent Trailer
Camping – RV	Camping as “Main” and use Truck camper/van, Travel trailer/fifth wheel, or Motor Home/RV
RVing (non-camping)	
	A motor home or RV while traveling or touring (not a camping trip) as “Main” AND NO Camping as “Main” and use Truck camper/van, Travel trailer/fifth wheel, or Motor Home/RV

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

Maine
New Hampshire
Vermont
Massachusetts
Connecticut
Rhode Island

Middle Atlantic

New York State
Pennsylvania
New Jersey

South Atlantic

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

East North Central

Wisconsin
Michigan
Illinois
Indiana
Ohio

West North Central

North Dakota
South Dakota
Minnesota
Iowa
Nebraska
Kansas
Missouri

East South Central

Kentucky
Tennessee
Mississippi
Alabama

West South Central

Oklahoma
Arkansas
Texas

Louisiana

Mountain

Montana
Idaho
Wyoming
Nevada
Utah
Colorado
New Mexico
Arizona

Pacific

Washington State
Oregon
California

Alaska**Hawaii**

D. TNS Canadian Facts' "Lifestages" Definitions

1 - YOUNG SINGLES:

1-Member Household

- Age of Head Under 35

2 - MIDDLE SINGLES:

1-Member Household

- Age of Head from 35 to 65

3 - OLDER SINGLES:

1-Member Household

- Age of Head Over 65

4 - YOUNG COUPLE:

Multimember Household

Age of Head Under 45

- Married or Non-related Individual(s) of Opposite Sex 18+ Present
- No Children Present

5 - WORKING OLDER COUPLE:

Multimember Household

Age of Head 45 and Over

Head of Household Employed

No Children Present

Married or Non-related Individual(s) of Opposite Sex 18+ Present

6 - RETIRED OLDER COUPLE

Multimember Household

Age of Head 45 and Over

Head of Household NOT Employed

No Children Present

Married or Non-related Individual(s) of Opposite Sex 18+ Present

7 - YOUNG PARENT

Multimember Household

Age of Head Under 45

- Youngest Child Under 6

8 - MIDDLE PARENT:

Multimember Household

Age of Head Under 45

- Youngest Child 6+

9 - OLDER PARENT:

Multimember Household

Age of Head 45+

- Child at Home - Any Age

0 - ROOMMATES

Head of Household Living with a Non-relative 18+ of Same Sex

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

TABLE A1: MAJOR ACTIVITY GROUPS – MAIN & ANY	Overnight Trip Activities - U.S. Pleasure Tourists			
	To British Columbia		To Any Destination	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(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
Outdoors				
Sunbathing or sitting on a beach	14%	36%	13%	29%
Swimming in oceans	9%	33%	9%	28%
Alpine skiing/snow boarding	13%	17%	6%	8%
Nature park	23%	50%	10%	27%
Camping - public campground in national/state/provincial park	12%	27%	7%	17%
Fishing	11%	23%	8%	19%
Fresh water	8%	17%	6%	15%
Salt water	5%	12%	3%	7%
Swimming in lakes	5%	21%	4%	16%
Well known natural wonders	19%	48%	7%	21%
Scuba diving/snorkelling	7%	26%	3%	12%
Snorkelling in seas/oceans	5%	24%	2%	11%
Seaside resorts (lodging)	12%	34%	7%	19%
Hiking - same day excursion on overnight trip	8%	36%	4%	18%
Hiking/backpacking as an overnight trip	6%	9%	3%	4%
Flora/fauna viewing	17%	50%	5%	21%
Wildlife viewing – land based animals	10%	33%	3%	13%
Wildflowers/flora	5%	25%	2%	9%
Whale watching	10%	31%	2%	8%
Bird watching	5%	20%	1%	7%
Cycling	6%	15%	2%	6%
Recreational cycling	4%	12%	1%	5%
Mountain biking	3%	6%	1%	2%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, pages 2/11. *Activities shown here are those that are named by at least 1-in-3 Sea Kayakers 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%
Historic sites -other	10%	47%	6%	25%
Art galleries	7%	36%	3%	15%
Museum - Science or Technology	5%	27%	3%	12%
Any Aboriginal Culture/Events	9%	28%	3%	9%
Aboriginal heritage attractions (museums/interpretive centres)	6%	23%	2%	6%
Aboriginal arts and crafts	3%	11%	1%	3%
Entertainment				
Amusement parks	18%	35%	18%	34%
Casino	16%	50%	14%	36%
Aquariums	8%	33%	5%	21%
Water theme parks	4%	12%	5%	13%
Zoos	8%	31%	6%	21%
Farmers' markets or country fairs	7%	35%	4%	19%
Movies/cinemas	5%	41%	3%	27%
Firework displays	6%	24%	3%	16%
Food & Wine				
Dining – restaurants offering local ingredients and recipes	10%	73%	6%	58%
Dining - other high-end (not with international reputation)	6%	42%	3%	25%
Local outdoor cafes	4%	50%	2%	28%
Wine tasting (day visit)	10%	39%	3%	16%
Shopping				
Clothing, shoes, jewellery	7%	57%	5%	50%
Bookstores or music stores	5%	54%	3%	35%
Local arts & crafts studios	6%	55%	3%	34%
Antiques	5%	34%	3%	23%

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