



RESEARCH SERVICES

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

Focus on Snowmobilers

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Acknowledgments

The 2006 Travel Activities and Motivations Survey (TAMS), was a comprehensive survey of North American households designed to examine the recreational activities and travel habits and behaviours of Americans and Canadians over the past two-year period.

The survey was conducted in Canada and the United States between January 2006 and June 2006. Only adults (18 years and over) were recruited to complete the survey. The reference period for the data is 2004 and 2005.

TAMS was a partnership of the following organizations:

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

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I. Executive Summary

OVER 3.4 MILLION AMERICANS HAVE BEEN SNOWMOBILING ON RECENT VACATIONS.

These American pleasure tourists represent 1-in-50 of the 166.0 million adult pleasure tourists in the U.S. (2%). Approximately half of the 3.4 million travellers with some snowmobiling experience while on trips, or about 1.7 million (51%), say they took a trip *in order to* snowmobile. This more committed group of Snowmobilers represents 1-in-100 of the 166.0 million U.S. overnight pleasure travellers to any destination (1%).

BRITISH COLUMBIA ATTRACTS SNOWMOBILERS AT A HIGHER THAN AVERAGE RATE.

While a niche market, Snowmobilers are twice as likely to have travelled to British Columbia recently as would be expected given their share of the total U.S. pleasure travel market (1%). At approximately 101,000, this sector represents about two percent of the 5.3 million American adults with pleasure travel experiences in British Columbia over a two-year period.

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

They are apt to reside in states where opportunities to participate in the sport are most prevalent – states with cold winters and relatively flat and open terrain. Thus, they are over-represented in Michigan (10%), followed by Minnesota (8%), Illinois and Wisconsin (6%, each) and other northeastern states. In contrast, comparatively few Snowmobilers live in the **South Atlantic, East South Central** or **West South Central** regions.

Because of its large population base, the **Pacific** region, and most notably California, contributes about one-sixth of all American Snowmobilers (17% from the region; 13% from California). At these rates, Snowmobilers from Pacific states are represented in the same proportions as is the U.S. adult population as a whole (16%), but well below the contribution Pacific states make to American tourism in British Columbia (50%).

Since Snowmobilers are concentrated in parts of the United States that are *not* major feeder markets for the province, attracting these tourists may pose a special challenge for British Columbia.

SNOWMOBILERS TEND TO BE MEN IN THEIR MID-TWENTIES TO MID-FORTIES.

At over 6-in-10, men may predominate, but close to 4-in-10 Snowmobilers are women. All age groups are represented, but once a traveller reaches 55 years of age, he or she is unlikely to seek snowmobiling experiences. Consistent with their ages, American Snowmobilers are parents or, less commonly, a partner in a couple. They live in households of about three people, on average.

SNOWMOBILERS SPAN WIDE EDUCATION AND INCOME RANGES.

About one-third of Snowmobilers are university educated, over three-quarters are actively engaged in the labour force and one-third live in households with at least one person occupying an executive, managerial or professional position. They 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. They are divided almost evenly among those with household incomes under \$60,000, between \$60,000 to under \$100,000 and \$100,000 or more

ONE-HALF OF AMERICAN SNOWMOBILERS RESTRICT THEIR TRAVEL TO THE U.S.A.

When asked to identify the destinations of the overnight pleasure trips they took over a two-year period, one-half of Snowmobilers claim to have travelled *only* within their own country. Just over one-quarter of them have been to Canada on a recent overnight pleasure trip.

Even though Canada is a more attractive destination among Snowmobilers (26%) than it is within the U.S. travelling public as a whole (13%), the prevalence of travel *only* within the U.S. by Snowmobilers poses a challenge for British Columbia.

ONTARIO IS THE PRINCIPLE CANADIAN COMPETITOR FOR THESE AMERICAN TRAVELLERS.

Over a two-year period, **Ontario** attracted almost three times as many Snowmobilers (17%) as did British Columbia (6%). The strong showing for Ontario is likely a function of Snowmobilers' concentration in states close to Ontario – Minnesota, Michigan and Wisconsin.

SNOWMOBILERS ARE DRAWN TO SUN/SEA DESTINATIONS.

U.S. sun/sea destinations, including Florida, California, and Nevada attract about three-fifths of Snowmobilers for overnight pleasure trips whether for snowmobiling or any other tourism experience. On a state-by-state basis, **Florida, Nevada, New York, and California** and are the most popular U.S. destinations for Snowmobilers when travelling outside their home state.

When residents are included, Florida and California each captures about 3-in-10 American Snowmobilers, more likely for a winter *break* than for snowmobiling. Similarly, Nevada entices over one-fifth of these tourists. Again, these visitors are much more likely to be in Nevada for a winter break or gambling than for snowmobiling. At about one-fifth of all Snowmobilers, New York and Michigan pose the most substantive competition for resident and non-resident tourists who are likely *snowmobiling* while on their trip. As such, these closer-to-home states represent stiff competition for British Columbia's snowmobiling businesses.

A SAFE DESTINATION IS A PRIORITY.

Most Snowmobilers start a trip planning process with a *destination* in mind although about one-third start with a focus on **activities** and one-fifth begin with the **type of vacation experience** they wish to have. Their 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*, have *many things for adults to see and do*, be *easy to access by car*, pose *no health concerns* and offer *mid-range lodging*.

SNOWMOBILERS HAVE LIMITED INTEREST IN THE OUTDOORS.

They are not especially inclined to take vacations for the other types of activities of particular salience to British Columbia. Nonetheless, about one-third of them are also **Alpine Skiers** and/or **Campers/RVers** and about one-quarter are **Anglers** or **History/Heritage Tourists**.

On an individual trip activity basis, comparatively few outdoor experiences enjoy widespread popularity among Snowmobilers although about one-third of them take trips in order to alpine ski and the same proportion go skiing as one of the activities they engage in on trips (*any*).

As their predisposition go to sun/sea destinations might suggest, they are especially interested in **water-based travel experiences** such as fishing and sunbathing on a beach. These activities, along with exploring on an ATV and camping drive trips for about 1-in-4 Snowmobilers. In each case, the level of

participation in these activities as *one-of-many* things to do is higher than the proportion of Snowmobilers who take trips motivated by these pursuits.

MOST SNOWMOBILERS DO NOT TAKE CULTURAL, CULINARY OR SHOPPING TRIPS.

By and large, Snowmobilers 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 these tourists.

Even as *one-of-many* activities, cultural and heritage attractions and events such as museums, galleries, or cultural performances are not widely sought by Snowmobilers when on vacation. 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 cultural and heritage activities, dining out at restaurants offering *local* ingredients and cuisine and other high-end dining experiences are much more common trip experiences (any) than trip drivers. Shopping, especially for apparel is a common trip pastime for Snowmobilers but tends not to be the motivation for their recent overnight pleasure travel.

THE INTERNET TOPS THE CHART AS A TRIP PLANNING TOOL.

Almost 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 3-in-10 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.

BRITISH COLUMBIA ACHIEVES A MODERATELY FAVOURABLE "APPEAL" RATING.

At 6.8 on a ten-point scale, British Columbia's rating as an appealing destination is well below the ratings achieved by Hawaii (8.2), Colorado (7.4), Florida (7.3) and California (7.2) but higher than any other Canadian destination.

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

DISTANCE MAY POSE A CHALLENGE FOR ATTRACTING U.S. SNOWMOBILERS TO BRITISH COLUMBIA.

Most American Snowmobilers live in parts of the U.S. that are not traditional feeder markets for British Columbia. Drawing these visitors from northern plains and northeastern states during the winter months, especially if they wish to tow their own sleds behind their cars or trucks, may pose a substantive challenge. The challenge is compounded by Snowmobilers reluctance to travel *outside* their own country.

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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).²

- River Rafters
- Sea Kayakers
- Backcountry Lodge Guests
- Cyclists/Mountain Bikers
- History and Heritage Tourists
- **Snowmobilers**
- Divers & Snorkellers
- Nordic Skiers & Other Non-Alpine Winter Sport Participants³
- 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 **Snowmobilers**. Additional profiles will be issued over the coming months.

² See Appendix for a brief description of the TAMS study and the activities used to define each of the activity sectors.

³ 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 Snowmobilers Report

This profile provides information about **American Snowmobilers**. 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 *snowmobiling* either as a day activity or overnight touring trip was the main reason for at least one of the overnight trips they took over this same time period.⁴

People who take a trip *in order to* engage in snowmobiling are only a fraction of tourists who participate in this winter outdoor activity while on their vacations. In fact, over 3.4 million Americans say they have had a snowmobiling experience on at least one of their trips over a two-year period. Of these American pleasure tourists, over half or about 1.7 million (51%) say they took a trip *in order to* snowmobile. These winter enthusiasts – those for whom snowmobiling is the main reason for a trip – are the focus of this report because as the “dedicated” or “hard core” market, they represent a crystallization of the interests and characteristics that might attract more casual participants to the activity.

Note to Readers

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

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

The report provides the following information:

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

⁴ 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).⁵ 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%).⁶ 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.

⁵ Adults are defined as individuals 18 years of age or older.

⁶ 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 sectors⁷ 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).⁸

⁷ 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.

⁸ 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.⁹ 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.

⁹ 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 snowmobile 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. Snowmobilers Market Profile

A. Regional and Demographic Characteristics

1. Place of Residence

At 1.7 million, Snowmobilers – American adults who take vacations *in order to go snowmobiling* – are a small niche market. They represent 1-in-100 American overnight pleasure travellers to *any destination* and 1-in-50 of the 5.3 million Americans who have come to British Columbia for a vacation in the past two years or so.

Most members of this tourism sector are *day trail users* rather than *overnight snowmobilers*. Day-users represent 9-in-10 American tourists in this market segment whereas about 1-in-4 say that they take trips in order to engage in an overnight touring trip using a snowmobile.

Snowmobiling

Day use on an organized trail	90%
Overnight touring trip	26%

Table 1 provides the place of residence by U.S. Census Regions and for individual states that emerge as noteworthy for Snowmobilers. For a list of the states in each of the U.S. Census Regions, please refer to the appendix. These snowmobile 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 cold winters and relatively flat and open terrain.

- The **East North Central** states are home to 1-in-4 Snowmobilers. Many of these Americans live in Michigan (10%), followed by Illinois and Wisconsin (6%, each).
- About 1-in-8 Snowmobilers live in the **Middle Atlantic** states including New York (7%) and Pennsylvania (5%).
- Over one-tenth of Snowmobilers live in the **West North Central** region and most of these tourists reside in Minnesota (8%).
- In contrast, comparatively few Snowmobilers live in the **South Atlantic, East South Central** or **West South Central** regions.
- Because of its large population base, the **Pacific** region, and most notably California, contributes about one-sixth of all American Snowmobilers (17% from

the region; 13% from California). At these rates, the Snowmobilers from Pacific states are represented in the same proportions as is the U.S. adult population as a whole (16%), but well below the contribution Pacific states make to American tourism in British Columbia (50%).

On an individual basis, states in which Snowmobilers surpass the market's share of the U.S. adult population and of recent overnight pleasure tourists to British Columbia include the following:

	Share of . . .	
	Snowmobilers	B.C. Tourists
• Michigan	10%	2%
• Minnesota	8%	2%
• New York	7%	3%
• Illinois	6%	3%
• Wisconsin	6%	1%
• Massachusetts	5%	1%
• Pennsylvania	5%	1%

Conversely, states in which members of this winter sport sector are substantively *under-represented* include those that are strong traditional markets for British Columbia.

	Share of . . .	
	Snowmobilers	B.C. Tourists
• California	13%	24%
• Washington	3%	20%
• Oregon	2%	6%
• Florida	1%	5%

Since Snowmobilers are concentrated in parts of the United States that are *not* major feeder markets for the province, attracting these tourists may pose a special challenge for British Columbia.

TABLE 1: PLACE OF RESIDENCE	Snowmobilers	U.S.		
		All U.S. Pleasure Tourists	Population	Adults (18+ Years)
	Total	To British Columbia	Any Destination	
Unweighted base	(539)	(1,706)	(45,697)	(60,649)
Weighted, Projected	1,712,000	5,340,000	166,003,000	222,846,000
Incidence of Snowmobilers	100%	2%	1%	1%
New England	8%	3%	5%	5%
Massachusetts	5%	1%	2%	2%
Middle Atlantic	13%	6%	14%	14%
New York	7%	3%	6%	7%
Pennsylvania	5%	1%	4%	4%
East North Central	25%	9%	16%	16%
Illinois	6%	3%	4%	4%
Michigan	10%	2%	4%	4%
Wisconsin	6%	1%	2%	2%
West North Central	11%	5%	7%	7%
Minnesota	8%	2%	2%	2%
South Atlantic	5%	11%	19%	19%
Florida	2%	5%	6%	6%
East South Central	2%	2%	6%	6%
West South Central	5%	6%	11%	11%
Texas	4%	5%	7%	8%
Mountain	12%	7%	7%	7%
Pacific	17%	50%	16%	16%
Washington	3%	20%	2%	2%
Oregon	2%	6%	1%	1%
California	13%	24%	13%	12%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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 Snowmobilers, they tend to be at the younger end of the age spectrum. Close to one-fifth (18%) are young adults (18 to 24 years) and one-quarter are in their mid-twenties to mid-thirties or mid-thirties to mid-forties. A further fifth are in their mid-forties to mid-fifties but interest in this winter activity tapers off substantively among American travellers once they reach their mid-fifties (see Table 2).

Snowmobilers' age distribution suggests a market in which young adults (18%) are over-represented compared to the population of the country as a whole (11%) and older adults (55 years of age or over) are substantively under-represented. In fact, older Americans represent only 1-in-6 Snowmobilers whereas 1-in-3 American adults are in this age group.

In turn, the Snowmobiler tourist market in the U.S. differs from the typical U.S. visitor to British Columbia. Specifically, almost half of the Americans who have recently taken an overnight pleasure trip to the province are 55 years of age or over (45%) but, as noted above, only one-sixth of the snowmobiling market is in this age group (17%).

Men (61%) are more likely to be Snowmobilers than are women (39%), with younger men (18 to 34 years) representing over one-quarter of the market.

TABLE 2: AGE & GENDER	Snowmobilers	All U.S. Pleasure Tourists		U.S. Population
		To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	Total (539)	(1,706)	(45,697)	(60,649)
Weighted, Projected	1,712,000	5,340,000	166,003,000	222,846,000
Age				
18 – 24 Years	18%	6%	11%	11%
25 – 34 Years	23%	15%	21%	20%
35 – 44 Years	24%	14%	17%	16%
45 – 54 Years	18%	21%	21%	21%
55 – 64 Years	13%	21%	16%	16%
65+ Years	4%	24%	14%	17%
Gender				
Men	61%	53%	49%	48%
18 – 34 Years	27%	11%	16%	16%
35 – 54 Years	24%	20%	18%	18%
Women	39%	47%	52%	52%
18 – 34 Years	14%	10%	16%	15%
35 – 54 Years	18%	16%	20%	19%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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 Snowmobilers, like tourists who live in the U.S. as a whole, are white. About one-third are university educated, over three-quarters are actively engaged in the labour force and one-third live in households with at least one person occupying an executive, managerial or professional position (see Table 3).

Snowmobilers 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 Snowmobilers have household incomes under \$60,000 (30%), a somewhat higher proportion is in the \$60,000 to under \$100,000 bracket (37%) and one-third fall into the more affluent \$100,000+ bracket (33%).

TABLE 3: RACE, EDUCATION, OCCUPATION, INCOME	Snowmobilers	All U.S. Pleasure Tourists	U.S. Population	
	Total	To British Columbia	Any Destination	Adults (18+ Years)
Unweighted base	(539)	(1,706)	(45,697)	(60,649)
Weighted, Projected	1,712,000	5,340,000	166,003,000	222,846,000
Race				
White	88%	87%	86%	84%
African American	2%	2%	6%	7%
Asian American	3%	4%	2%	2%
Other/Not stated	8%	7%	6%	7%
Education				
High school diploma or less	23%	9%	20%	26%
Some post-secondary	33%	23%	29%	29%
Post-secondary diploma or certificate	12%	9%	10%	10%
University degree+	31%	56%	39%	33%
Labour Force Participant¹	77%	62%	66%	61%
Retirees	8%	26%	15%	16%
Executive/Manager /Professional²	33%	32%	30%	26%
Household Income³				
Under \$40,000	17%	14%	27%	36%
\$40,000 - \$59,999	13%	16%	19%	18%
\$60,000 - \$99,999	37%	31%	30%	26%
\$100,000 - \$149,999	19%	22%	16%	12%
\$100,000+	33%	39%	24%	20%
\$150,000+	14%	17%	8%	6%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, pages 34, 35, 36, 37. ¹ Labour force participant" includes working full time, part time and self-employed. ²Male or female head of household. ³Note: 2005 household incomes have been re-percentage on total stating an income (US\$). "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so. *Less than 0.5%.

Tourists in this niche market mirror the U.S. adult population as a whole in terms of their level of formal education but are more likely to be in the labour force, to occupy professional or managerial positions and to be in higher income brackets than are typical American pleasure tourists. They closely resemble the *typical* U.S. tourist to British Columbia in terms of income but are considerably less likely to be university-educated. Because they tend to be younger than the typical U.S. tourist to British Columbia Snowmobilers are more apt to be engaged in the labour force. In contrast, they are much less apt to be retired (8%) than are British Columbia's visitors from the U.S. as a whole (26%).

3. Life Stage

Consistent with their ages, American Snowmobilers are parents (57%) or, less commonly, a partner in a couple (32%). 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 Snowmobilers are *retired older couples* (5%) than are *typical* tourists to the province (16%).

TABLE 4: HOUSEHOLD CHARACTERISTICS	Snowmobilers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
HOUSEHOLD SIZE			
1 person	6%	14%	12%
2 people	29%	46%	34%
3 person	18%	15%	19%
4 people	25%	14%	20%
5+ people	20%	9%	14%
Average (all ages)	3.3	2.6	3.0
LIFESTAGE¹			
Young singles	3%	3%	3%
Middle singles	3%	7%	6%
Older singles	*	4%	3%
Young couple	16%	12%	11%
Working older couple	11%	18%	13%
Retired older couple	5%	16%	9%
Young parent	12%	7%	13%
Middle parent	18%	5%	11%
Older parent	28%	23%	28%
Any singles	6%	14%	12%
Any couples	32%	46%	34%
Any parent	57%	35%	51%

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

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. Snowmobilers indicated that they have taken recent vacations within the U.S.A. and one-half claim to have travelled *only* within their own country (see Table 5). Just over one-quarter of them have been to Canada on a recent overnight pleasure trip (26%), suggesting that Canada is a particularly attractive destination for these sledding 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 Snowmobilers vis-à-vis the general travelling public in the U.S., the prevalence of travel *only* within the U.S. poses a challenge for British Columbia and all other parts of Canada. The key foreign competitive destination among Snowmobilers is Mexico (20%).

Note to Readers

Activities and locations visited are independent of one another.

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

**TABLE 5: COMPETITIVE DESTINATIONS
WORLDWIDE***

	Snowmobilers	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
Canada	26%	100%	13%
U.S.A.	99%	100%	98%
Other Countries (NET)	34%	52%	26%
Mexico	20%	27%	11%
Caribbean	15%	24%	11%
Europe	11%	21%	7%
South/Central America	4%	9%	3%
Australia/New Zealand	3%	3%	1%
Asia	3%	7%	2%
Africa	2%	2%	1%
Destination patterns			
Only U.S.A.	50%	-	67%
U.S.A. & Canada only	16%	48%	7%
U.S.A. & Mexico only	7%	-	5%
U.S.A. & Canada & Other Countries	10%	51%	5%
U.S.A. & Other Countries only (not Canada or Mexico)	10%	-	11%

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

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

B. Canadian Destinations

One-seventh of American Snowmobilers have had some travel experience in British Columbia over a ten-year period (14%) and less than half this proportion, or about 1-in-20, are *recent* pleasure tourists in the province (6%) (see Table 6). As noted earlier, however, these Snowmobilers may or may not have been snowmobiling 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 almost three times as many Snowmobilers (17%) as did British Columbia (6%). The prominence of Ontario as a Canadian destination is likely a function of where these tourists live: recall that they are concentrated in states much closer to Ontario than to British Columbia (e.g., Michigan, Minnesota, Wisconsin, Illinois).

TABLE 6: COMPETITIVE CANADIAN DESTINATIONS*

	Snowmobilers	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
British Columbia			
Any purpose, past 10 years	14%	100%	9%
Any purpose, past 2 years	9%	100%	4%
Pleasure, past 2 years	6%	100%	3%
Overnight Pleasure Trips in Past 2 Years to . . .			
Atlantic Canada	3%	8%	2%
Quebec	7%	9%	3%
Ontario	17%	17%	7%
Man/Sask	3%	7%	1%
Alberta	2%	15%	1%
Yukon	3%	9%	*

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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 Snowmobilers (see Table 7). Information on visitation by these travellers to *all* states, including their “home state” can be found in the detailed tabulations.¹⁰

Whether for snowmobiling or any other tourism experience, Snowmobilers 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 three-fifths of Snowmobilers for overnight pleasure trips (59%). On a state-by-state basis, **Florida, Nevada, New York, and California** are the most popular U.S. destinations for Snowmobilers when travelling outside their home state. As such, these states represent stiff competition for British Columbia’s snowmobiling businesses.

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

<u>Destinations</u>	<u>Excluding State Residents</u>	<u>Including State Residents¹¹</u>
Florida	29%	31%
California	17%	28%
New York State	19%	23%
Nevada	22%	22%
Michigan	11%	20%

When residents are included, Florida and California each captures about 3-in-10 American Snowmobilers, more likely for a winter *break* than for snowmobiling. Similarly, Nevada entices over one-fifth of these tourists. Again, these visitors are much more likely to be in Nevada for a winter break or gambling than for snowmobiling. At about one-fifth of all Snowmobilers, New York and Michigan pose the most substantive competition for resident and non-resident tourists who are likely *snowmobiling* while on their trip.

¹⁰ See Volumes 1 – 4, Table 47.

¹¹ See above.

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

	Snowmobilers	All U.S. Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
Sun/Sea States (S)	59%	75%	54%
<i>In rank order by Snowmobilers</i>			
Florida (S)	29%	25%	23%
Nevada (S)	22%	28%	14%
New York State	19%	19%	11%
California (S)	17%	32%	13%
Colorado	15%	18%	7%
Illinois	13%	14%	8%
Wisconsin	13%	8%	5%
Pennsylvania	12%	12%	9%
Hawaii (S)	11%	19%	6%
Washington D.C.	11%	13%	7%
Maine	11%	6%	4%
Michigan	11%	9%	6%
Arizona (S)	10%	23%	9%
South Carolina (S)	10%	7%	7%
Montana	10%	13%	3%
New Hampshire	10%	5%	3%
Ohio	10%	8%	7%
Wyoming	10%	10%	3%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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 Snowmobilers. "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. Snowmobilers the first consideration in planning their most recent summer and/or winter trip was **destination** (65%) (see Table 8). At the same time, about one-third of these sledders start the process with a focus on **activities** (35%) and one-fifth begin with the **type of vacation experience** they wish to have (19%). Their level of activity-driven planning is noticeably higher than is the case among typical U.S. tourists to British Columbia (16%) or in the American travel market as a whole (13%). Snowmobilers also put a premium on destination choice *per se*, with close to 3-in-4 claiming that it is *extremely* or *very important* to them.

TABLE 8: CONSIDERATIONS/ IMPORTANCE OF DESTINATION

	Snowmobilers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
First Consideration for Most Recent Summer/Winter Trip (NET)*			
Start with destination	65%	72%	62%
Start with activities	35%	16%	13%
Start with type of vacation experience	19%	19%	20%
Look for package deal	2%	3%	2%
Importance of Destination			
Extremely/Very Important	70%	73%	67%
Extremely important	29%	31%	29%
Very important	41%	42%	39%
Average**	3.9	4.0	3.9

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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.¹²

Snowmobilers 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, Snowmobilers put *feeling safe* at the top of their list (70%) (see Table 9).

About half of them also want a destination with *many things for adults to see and do* (49%) and *convenient access by car* (46%). Consistent with their interest in feeling safe, two-fifths of U.S. Snowmobilers want the destination to pose *no health concerns* (39%) and slightly fewer expect it to offer *mid-range lodging* (35%).

Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 Snowmobilers¹³

		U.S. Pleasure Tourists	
	<u>Snowmobilers</u>	<u>To British Columbia</u>	<u>Total</u>
Feeling safe	70%	67%	73%
Lots for adults to see/do	49%	50%	48%
Convenient access by car	46%	35%	51%
No health concerns	39%	40%	43%
Mid-range accommodation	35%	37%	33%

Availability of *information on the internet*, *low cost travel packages* (31%, each) and *direct air access* (29%) are salient factors in a destination choice for about 3-in-10 Snowmobilers. Approximately one-quarter of these tourists identify *familiarity with the culture and language* of the place they are visiting as a *highly important* attribute in destination selection. Consistent with their propensity to travel *only* within the U.S., over three times as many Snowmobilers seek **familiar** environments (*language/culture*) (25%) as want a destination to be *very different, culturally* than their own (8%).

¹² “Highly important”, “Somewhat important”, and “Of no importance”.

¹³ See Table 9 for full array of considerations deemed “highly important” and “of no importance”.

TABLE 9: CONDITIONS FOR SELECTING A DESTINATION

	Snowmobilers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
<i>Bold rows are proportion stating "Highly Important". In rank order by Snowmobilers</i>			
Feeling safe	70%	67%	73%
Of no importance	4%	2%	2%
Lots for adults to see/do	49%	50%	48%
Of no importance	6%	4%	5%
Convenient access by car	46%	35%	51%
Of no importance	8%	12%	7%
No health concerns	39%	40%	43%
Of no importance	14%	14%	14%
Mid-range accommodation	35%	37%	33%
Of no importance	13%	9%	13%
Information available on internet	31%	28%	28%
Of no importance	19%	23%	24%
Low cost packages available	31%	21%	32%
Of no importance	17%	26%	18%
Direct access by air	29%	34%	26%
Of no importance	25%	14%	25%
Familiar with culture & language	25%	12%	23%
Of no importance	20%	24%	17%
Budget accommodation	22%	22%	29%
Of no importance	27%	27%	21%
Lots for children to see/do	20%	10%	20%
Of no importance	56%	71%	55%
Great shopping	18%	11%	16%
Of no importance	40%	44%	36%
Camping	15%	9%	8%
Of no importance	51%	63%	65%
Luxury accommodation	14%	9%	9%
Of no importance	49%	48%	54%
Have friends or relatives there	11%	7%	14%
Of no importance	62%	64%	55%
Disabled-person-friendly	8%	8%	9%
Of no importance	75%	77%	71%
Very different culture than own	8%	11%	8%
Of no importance	46%	34%	48%
Convenient access by train/bus	7%	9%	8%
Of no importance	60%	45%	54%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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 Snowmobilers are most enthusiastic about Hawaii as an *appealing destination* for pleasure travel, according this tropical state a rating of 8.2 on a ten-point scale (see Table 10).¹⁴ With two exceptions, all other U.S. destinations included in the study also achieve substantively higher ratings among Snowmobilers than does British Columbia at 6.6. British Columbia's appeal rating is similar to Arizona's and New York State's and higher than any other Canadian destination.

Despite its moderate success among those offering an appraisal of British Columbia's appeal, it is important to note that more than one-quarter of U.S. Snowmobilers refrain from rating the province (28%), 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 Snowmobilers (6.6) or all U.S. pleasure travellers (6.2), most of whom have no direct experience with British Columbia.

Summary: Highest Appeal Destinations among Snowmobilers¹⁵

	<u>Snowmobilers</u>	<u>U.S. Pleasure Tourists</u>	
		<u>To British Columbia</u>	<u>Total</u>
Hawaii	8.2	8.5	8.4
Colorado	7.4	7.5	7.1
Florida	7.3	6.8	7.3
California	7.2	7.8	7.3
Arizona	6.9	7.0	6.6
New York State	6.7	7.0	6.6
British Columbia	6.6	8.7	6.2

¹⁴ 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.

¹⁵ See Table 10 for full array of average ratings and proportion unable/unwilling to rate each destination.

TABLE 10: APPEAL OF VARIOUS DESTINATIONS

	Snowmobilers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
<i>Bold rows are average ratings*</i>			
British Columbia	6.6	8.7	6.2
No rating provided	28%	2%	31%
Newfoundland & Labrador	5.0	6.0	4.8
No rating provided	41%	29%	42%
Nova Scotia	5.5	6.7	5.5
No rating provided	35%	24%	35%
New Brunswick	4.8	6.1	4.9
No rating provided	41%	31%	43%
Prince Edward Island	5.6	6.9	5.6
No rating provided	34%	25%	38%
Quebec	5.8	6.8	5.8
No rating provided	23%	18%	28%
Ontario	6.3	6.8	6.1
No rating provided	18%	19%	25%
Manitoba	5.1	5.6	4.7
No rating provided	37%	31%	43%
Saskatchewan	5.4	5.6	4.8
No rating provided	36%	29%	42%
Alberta	5.5	6.8	5.2
No rating provided	34%	22%	38%
Yukon	5.8	6.3	5.1
No rating provided	29%	24%	37%
Northwest Territories	5.9	6.1	5.1
No rating provided	29%	26%	36%
New York State	6.5	7.0	6.6
No rating provided	8%	8%	10%
Colorado	7.4	7.5	7.1
No rating provided	8%	8%	11%
Florida	7.3	6.8	7.3
No rating provided	5%	6%	6%
California	7.2	7.8	7.3
No rating provided	6%	3%	7%
Hawaii	8.2	8.5	8.4
No rating provided	6%	5%	8%
Arizona	6.7	7.0	6.6
No rating provided	7%	6%	10%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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 the ones that emerge at the top of Snowmobilers' lists for having *many good reasons* to visit on a pleasure trip (see Table 11).¹⁶ Specifically, Hawaii tops the list with 7-in-10 Snowmobilers stating that there are many good reasons to go to this tropical destination. British Columbia is well down on the list, with only 3-in-10 Snowmobilers claiming that there are *many* good reasons to go to the province.

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

Summary: Destinations With At Least One-Half Saying *Many Good Reasons* to Visit (in rank order within each category)¹⁷

<u>Snowmobilers</u>		U.S. Pleasure Tourists			
		<u>To British Columbia</u>		<u>Total</u>	
Hawaii	70%	British Columbia	73%	Hawaii	67%
Florida	55%	Hawaii	72%	Florida	54%
California	53%	California	63%	California	53%
Colorado	52%				
.....		Less than One-Half		
New York State	41%			Colorado	41%
Arizona	32%			New York State	40%
British Columbia	30%			Arizona	31%
				British Columbia	21%

¹⁶ 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*.

¹⁷ 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**

	Snowmobilers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
<i>% stating "MANY" good reasons to visit</i>			
British Columbia	30%	73%	21%
<i>Rank order among Snowmobilers</i>			
Hawaii	69%	72%	67%
Florida	55%	45%	54%
California	53%	63%	53%
Colorado	52%	46%	41%
New York State	41%	47%	40%
Arizona	32%	35%	31%
Ontario	25%	28%	20%
Quebec	22%	33%	18%
Northwest Territories	20%	20%	11%
Yukon	20%	23%	11%
Prince Edward Island	17%	25%	13%
Alberta	17%	27%	10%
Nova Scotia	16%	25%	13%
Saskatchewan	12%	10%	6%
Newfoundland & Labrador	11%	16%	8%
New Brunswick	11%	16%	7%
Manitoba	10%	9%	5%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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*.¹⁸

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 **snowmobiling** 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 snowmobiling could have been in British Columbia's Sicamous and Eagle Valley area, on the Paul Bunyon Trail near Brainerd Minnesota, or on the Hellisheidi Mountain Plateau in Iceland. 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* Snowmobilers 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 Snowmobilers 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.

¹⁸ Presumably, "these trips" are those on which the specific activity took place.

B. Trip Activities & Drivers

1. Cross-Over with Other Trip Activity Sectors

As demonstrated by their representation in other activity-based tourism sectors, Snowmobilers are not especially inclined to take vacations for the other types of activities of particular salience to British Columbia.¹⁹ Nonetheless, about one-third of them are also **Alpine Skiers** and/or **Campers/RVers** and about one-quarter are **Anglers** or **History/Heritage Tourists** (see Table 12).

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

- Compared to the U.S. travelling public as a whole, Snowmobilers are much more likely to be Sea Kayakers and display a penchant for other *winter* activities including Nordic skiing/other related winter outdoor sports. They are at least **five times** as likely to be Alpine Skiers, Backcountry Lodge Guests, Cyclists/Mountain Bikers and River Rafters.
- They are also about **four times** as likely to take trips to do scuba diving or snorkelling.
- Snowmobilers are **three times** more apt to take trips in order to fish than is the American travelling public as a whole.

¹⁹ 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 Snowmobilers 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**

	Snowmobilers	All U.S. Pleasure Tourists		
		To British Columbia (1,706)	Any Destination (45,697)	Index Snowmobilers to All U.S. Tourists
Unweighted base	Total (539)			
Weighted, Projected	1,712,000	5,340,000	166,003,000	
<i>Rank order among Snowmobilers</i>				
Snowmobilers	100%	2%	1%	N/A
Alpine Skiers	31%	13%	6%	517
Campers/RVers	30%	16%	11%	273
Anglers	25%	11%	8%	313
History and Heritage Tourists	24%	22%	14%	171
Hikers	17%	11%	6%	283
Self-Guided Overnight Touring Travellers	17%	26%	11%	155
Divers & Snorkellers	12%	7%	3%	400
Backcountry Lodge Guests	12%	4%	2%	600
Golfers	11%	7%	4%	275
Cyclists/Mountain Bikers	10%	6%	2%	500
Nordic Skiers	10%	5%	1%	1,000
River Rafter	8%	3%	1%	800
Aboriginal Activity Tourists	7%	9%	3%	233
Sea Kayakers	3%	1%	*	10,000

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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 Snowmobilers are motivated to take overnight pleasure trips in order to engage in *snowmobiling*. Consequently, they are all members of the more broadly defined **outdoor winter activity** market. Like most tourists, however, Snowmobilers take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors.²⁰

- In addition to taking trips in order to go snowmobiling, all of these Americans claim to have taken recent vacations motivated by an **outdoor water-based activity** such as *fishing, motor boating, sunbathing at a beach* or *swimming*.
- Three-quarters also take trips in order to participate in at least one **land-based outdoor activity** such as *camping*, exploring on all terrain vehicles (ATVing) or *visiting nature parks*.
- About two-fifths of them have been motivated by **entertainment** activities such as *theme parks, casinos* and *movies* or **spectator sporting events** such as *professional baseball* or *football games*.
- Approximately one-third have taken recent overnight pleasure trips in order to engage in a **cultural activity** such as going to *well-known historic sites, museums*, or *cultural performances*; **resort** experiences, including stays at *seaside, mountain* and *lakeside properties*; and/or attending **fairs or festivals**.

Not surprisingly, *participation* rates for these groups of activities are appreciably higher than are *motivation* rates. For example, close to 9-in-10 Snowmobilers *participated* in at least one land-based outdoor activity while on a recent overnight pleasure trip (89%) but less than three-quarters were motivated to take the trip by one of these activities (71%).

Similarly, almost 2-in-3 Snowmobilers went to a museum, gallery or cultural performance on a recent trip but only about 1-in-3 of them took the trip in order to do so. Food and wine experiences are especially likely to be “one-of-many” trip activities (79%) but the driving force behind a trip for relatively few Snowmobilers (29%).

Compared to *all* U.S. overnight pleasure travellers, Snowmobilers are, for the most part, at least twice as likely to identify activities in each of the major **outdoor** activity

²⁰ 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 Snowmobilers 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.

groups as ones that *motivated* recent trips (main reason) or were engaged in on these trips (any participation). They are not, however, as substantively different from the typical American traveller when it comes to **entertainment** activities or **cultural** and learning activities on trips.

<u>Major Activity Group</u>	<u>Main Reason</u>		<u>Any Participation</u>	
		All U.S. Pleasure Tourists		All U.S. Pleasure Tourists
	Snowmobilers		Snowmobilers	
Outdoor Water Based	100%	30%	100%	56%
Outdoor Winter	100%	8%	100%	12%
Outdoor Land Based	71%	30%	89%	63%
Theme/Amusement Parks/Movies	42%	22%	60%	43%
Cultural/Learning & Events	36%	23%	62%	61%

The high levels of differentiation from *typical* American travellers, especially with respect to outdoor water and winter activities, are clear evidence of Snowmobilers' 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	Snowmobilers Overnight Trip Activities	
	Main Reason	Any Participation
Unweighted base	(539)	(539)
Weighted, Projected	1,712,000	1,712,000
Outdoor Winter Based Activities	100%	100%
Outdoor Water Activities	100%	100%
Outdoor Land Based Activities	71%	89%
Theme/Amusement Parks/Movies (Entertainment)	42%	60%
Spectator Sports	38%	49%
Cultural/Learning Activities & Events	36%	62%
Resorts	35%	56%
Fairs/Festivals	34%	59%
Food & Wine	29%	79%

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

3. Individual Trip Activities: The Outdoors

On an individual trip activity basis, comparatively few outdoor experiences enjoy widespread popularity among Snowmobilers although about one-third of them take trips in order to alpine ski and the same proportion go skiing as one of the activities they engage in on trips (*any*) (see Table 14).²¹

- As their predisposition go to sun/sea destinations might suggest, they are especially interested in ***water-based travel experiences***.
- Fishing, sunbathing on a beach, exploring on an ATV and camping drive trips for about 1-in-4 Snowmobilers. In each case, the level of participation in these activities as *one-of-many* things to do is higher than the proportion of Snowmobilers who take trips motivated by these pursuits.
- Other outdoor activities engaged in by at least 1-in-3 Snowmobilers include motor boating, swimming in lakes or oceans and going to nature parks.

Compared to *all* U.S. overnight pleasure travellers, Snowmobilers are more likely to identify *passive* outdoor activities such as sunbathing on a beach and *active* ones such as alpine skiing, ATVing, or fishing as activities that *motivated* recent trips (main reason) or were engaged in on these trips (any participation).

	<u>Main Reason</u>		<u>Any Participation</u>	
		All U.S. Pleasure Tourists		All U.S. Pleasure Tourists
<u>Outdoor Activities</u>	Snowmobilers		Snowmobilers	
Alpine skiing/snow boarding	31%	6%	33%	8%
Nature park	27%	10%	47%	27%
Fishing	25%	8%	44%	19%
Sunbathing or sitting on a beach	23%	13%	44%	29%
ATVing	23%	2%	34%	6%
Swimming in oceans	17%	9%	43%	28%

These levels of differentiation from *typical* American travellers are further evidence of Snowmobilers' distinctive *outdoor* tourism interests.

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

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 Snowmobilers 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 14: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN & ANY*	Snowmobilers Overnight Trip Activities	
	Main Reason	Any Participation
Unweighted base	(539)	(539)
Weighted, Projected	1,712,000	1,712,000
Snowmobiling (any)	100%	100%
Day use on organized trail	90%	94%
Overnight touring trip	26%	27%
Alpine skiing	31%	33%
Camping	27%	47%
In public campground in national/state/provincial park	19%	34%
Fishing	25%	44%
Sunbathing or sitting on a beach	23%	44%
All terrain vehicles (ATVs, day excursion or overnight tour)	23%	34%
Nature park	20%	33%
Swimming in oceans	17%	43%
Motor boating	16%	33%
Swimming in lakes	14%	43%

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 about 1-in-3 Snowmobilers 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, Snowmobilers 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.²² Entertainment-oriented activities in general, and particularly theme parks and casinos are, however, trip motivators for about 1-in-3 Snowmobilers' trips (see Table 15). As noted previously, spectator sporting events are also common trip drivers, attracting close to 2-in-5 Snowmobilers.

Culture

Even on a *one-of-many* basis, Snowmobilers are low engagement tourists for most cultural and heritage activities covered in the study. The only cultural/heritage activity to capture the interest of at least 1-in-3 Snowmobilers is going to well-known historic sites (Main, 12%; Any, 34%).

Entertainment

Entertainment-oriented activities are much more likely to have motivated Snowmobilers to take trips than are cultural activities. As noted above, these sledders are especially drawn by amusement parks (Main, 35%; Any, 50%) and by casinos (Main, 30%; Any, 54%). Going to zoo, farmers' markets or country fairs and/or fireworks displays are trip drivers for about 1-in-7 Snowmobilers and activities on trips for about 1-in-3. Taking in a movie is a common trip experience for Snowmobilers (Any, 39%) but is noticeably less likely to have been a recent trip *driver* for these tourists (Main, 11%).

Food & Wine

Similar to movies, dining at restaurants offering *local* ingredients and cuisine (Main, 14%; Any, 65%), other high-end dining experiences (Main, 7%; Any, 34%), and visiting local outdoor cafes (Main, 7%; Any, 36%) are much more common trip experiences (any) than trip drivers for Snowmobilers.

Shopping

Shopping for apparel and, less commonly, books, music or local arts and crafts is a comparatively widespread trip pastime for Snowmobilers but tends not to be the motivation for their recent overnight pleasure travel.

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 Snowmobilers 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.

Comparison to U.S. Pleasure Travellers

As noted in the previous section, compared to *all* U.S. overnight pleasure travellers, Snowmobilers are more likely to engage in outdoor activities or take trips for these activities. Similarly, they are more likely than the *typical* American pleasure traveller to identify a limited number 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. Pleasure		All U.S. Pleasure	
<u>Other Activities</u>	Snowmobilers	Tourists	Snowmobilers	Tourists
Amusement parks	35%	18%	50%	34%
Casinos	30%	14%	54%	36%
Restaurants - local ingredients/recipes	14%	6%	65%	58%
Well known historic sites	12%	8%	34%	30%
Shopping - Clothing, shoes, jewellery	11%	5%	56%	50%
Strolling in a city to see architecture	10%	7%	31%	34%
Wine tasting (day visit)	9%	3%	26%	16%

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

TABLE 15: OTHER INDIVIDUAL ACTIVITIES – MAIN & ANY*

	Snowmobilers Overnight Trip Activities	
	Main Reason	Any Participation
Unweighted base	(539)	(539)
Weighted, Projected	1,712,000	1,712,000
<i>In rank order by main reason within each subgroup</i>		
Cultural & Heritage		
Historic sites - well known	12%	34%
Entertainment		
Amusement park	35%	50%
Casino	30%	54%
Zoos	14%	33%
Farmers' markets/country fairs	13%	33%
Fireworks displays	13%	34%
Movies/cinemas	11%	39%
Food & Wine		
Dining – restaurants offering local ingredients and recipes	14%	65%
Dining - other high-end (not with international reputation)	7%	34%
Local outdoor cafes	7%	36%
Shopping		
Clothing, shoes, jewellery	11%	56%
Bookstores or music stores	8%	41%
Local arts & crafts studios	6%	39%

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 Snowmobilers 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 Snowmobilers are not recent overnight cruise passengers or organized overnight tour participants (see Table 16). Of the 1-in-4 who have taken an overnight cruise in the past two years or so, destinations in the Caribbean and other locations are more popular than are ships destined for Alaska.

Similar proportions of Snowmobilers claim to have taken an **organized** overnight group tour (21%) as to have taken **self-directed** touring trips over a two-year period (17%). Those who have gone on an overnight organized tour do not display a preference for tours to *single* versus *multiple* destinations.

Taking a day tour while on an overnight trip (35%) is about as characteristic of Snowmobilers as is taking any type of overnight tour (32%). As with overnight tours, Snowmobilers are just as inclined to take self-directed day tours (26%) as they are to take organized ones (23%). Favoured themes for organized day excursions include tours around the countryside or a city, sightseeing cruises, and/or wilderness or outdoor tours. These same themes are popular among Snowmobilers who take *self-directed* day touring.²³

²³ See Detailed Tabulations, Volume 4 page 13-2 for figures.

TABLE 16: CRUISES/GROUP TOURS	Snowmobilers	All U.S. Pleasure Tourists	
		To British Columbia	Any Destination
Unweighted base	Total (539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
Took any overnight cruise in past 2 years	25%	49%	17%
Type of Cruise/Destination			
Ocean - Alaska	5%	29%	3%
Ocean - Caribbean	11%	19%	9%
Ocean – Other	10%	15%	5%
Great Lakes	4%	1%	*
Overnight Touring (NET)	32%	48%	20%
Organized Tour	21%	32%	12%
Multiple Location	15%	26%	8%
Single Location	14%	16%	7%
Self-Directed Touring	17%	26%	11%
Same-Day Touring on Overnight Trip (NET)	35%	57%	30%
Self-Directed Touring	26%	38%	20%
Organized Excursion	23%	43%	19%
Type of Organized Day Tour			
<i>Among Organized Day Tour Takers</i>	(100%)	(100%)	(100%)
Countryside	65%	60%	42%
City	58%	69%	54%
Sightseeing cruise (day excursion)	45%	50%	34%
Wilderness/outdoor	40%	45%	26%
Casino	26%	18%	14%
Wineries	22%	21%	13%
Factory	19%	14%	7%
Airplane/helicopter (pilot or passenger)	12%	16%	6%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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 Snowmobilers 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 snowmobiler or is shared with other household members.

TABLE 17: TRAVEL PLANNING	Snowmobilers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
Frequency of personal involvement in trip planning, past 2 years			
All	65%	69%	65%
Most	18%	18%	15%
Some	10%	10%	10%
None/not stated	7%	4%	10%
Main responsibility for trip planning			
Respondent	37%	41%	39%
Spouse/partner	15%	20%	17%
Shared with other household member	28%	26%	25%
Other/not stated/not involved in travel planning	20%	13%	19%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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 Snowmobilers, the **internet** tops the chart (see Table 18). Almost 8-in-10 of these tourists rely on the internet for travel information and over 5-in-10 use their own **past experience** and/or anecdotal information provided by **friends and relatives**. About 3-in-10 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.

Information provided by official DMO guides and auto clubs, travel agents and visitor information centres provide guidance in travel planning for about one-quarter of the snowmobile tourist market.

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

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

(in rank order in each column)

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

With almost 8-in-10 Snowmobilers 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 businesses in British Columbia that wish to attract Snowmobilers. About one-third of American Snowmobilers also claim to watch **televised travel shows** (37%) and fewer say they frequently read **outdoor activities/sports magazines** such as *Backpacker* or *Outdoor Life* (28%) or general travel magazines such as *Condé Nast* (17%).

Compared to recent American tourists to British Columbia, Snowmobilers are more likely to read affinity group magazines such as *Outdoor Life* and but less inclined to

read generic *travel* magazines.²⁴ Outdoor activity magazines enjoy much more widespread popularity among Snowmobilers than they do within the general U.S. travelling public (11%).

Between one-quarter and one-fifth of Snowmobilers say they frequently read the **travel section** in their local newspaper's weekend (24%) and/or weekday edition (21%). This level of weekday travel section readership is slightly higher than is evident among U.S. overnight pleasure travellers as a whole, but lower than weekday and weekend travel section readership among those who have recently travelled to British Columbia.

²⁴ More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover. See Tables 36 – 41.

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

	Snowmobilers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
<i>In rank order by Snowmobilers</i>			
SOURCES OF TRAVEL PLANNING INFO			
Internet website	78%	82%	68%
Past experience	59%	60%	49%
Advice of friends/relatives	51%	54%	41%
Maps	30%	49%	29%
Any newspaper	27%	40%	20%
Articles	22%	36%	16%
Advertisements	17%	20%	10%
Auto club	24%	40%	22%
Official DMO travel guides	24%	42%	18%
Travel agent	23%	38%	17%
Visitor information centres	22%	28%	18%
Travel information in mail	19%	30%	14%
Travel guide books	13%	30%	11%
Any television	14%	19%	8%
Programs	12%	17%	6%
Advertisements	6%	6%	4%
Travel guide books	13%	30%	11%
Electronic newsletters via e-mail	9%	12%	5%
Trade, travel, sportsmen's shows	8%	7%	2%
TRAVEL MEDIA			
Frequently read newspaper Travel Section			
In weekday editions	21%	34%	16%
In weekend editions	24%	36%	20%
Magazines read in typical month			
Travel	17%	28%	11%
Outdoor activities/sports	28%	16%	11%
Normally watch Travel Shows on TV			
	37%	48%	29%
Normally visit Travel websites			
	48%	57%	39%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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, most American Snowmobilers rely on the internet for travel planning. Over half of Snowmobilers who use the internet for travel planning explore hotel/resort or travel sites such as *Expedia* or *Travelocity* (see Table 19). Airline and 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 1-in-2 Snowmobilers claim to have made a travel-related booking on line over the past two years or so (54%). As their website preferences would suggest, the most common on-line bookings are accommodation, followed by air tickets and, to a lesser degree, car rentals and attractions.

TABLE 19: WEBSITE USAGE FOR TRAVEL PLANNING

	Snowmobilers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
Used Internet website for travel planning, past 2 years	78%	82%	68%
	(100%)	(100%)	(100%)
<u>Internet website(s) used</u> (Among Users)			
Hotel/resort	58%	66%	53%
Travel planning/booking	55%	68%	56%
Airline	44%	67%	46%
Destination marketing organization	38%	50%	35%
Attraction	34%	40%	33%
Other	31%	31%	25%
Cruise	15%	35%	12%
Motorcoach	4%	3%	1%
Any Internet Purchases in Past 2 Years (Among All Overnight Pleasure Travellers)	54%	68%	47%
	(100%)	(100%)	(100%)
<u>Items Purchased On-Line</u> (Among Purchasers)			
Accommodation	77%	77%	72%
Air tickets	69%	86%	71%
Car rental	42%	55%	39%
Tickets for activities/attractions	42%	34%	27%
Package deal (2+ items)	29%	31%	18%
Rail, bus, boat tickets	18%	27%	12%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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 Snowmobilers (see Table 20). Only about 1-in-20 say they relied on a package deal for *all* or *most* of their trips over the past two years or so (6%) and a further 1-in-3 have used package deals for *one* or *some* of these trips (31%).

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

TABLE 20: PACKAGE DEALS	Snowmobilers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
Frequency of Purchasing Packages in Past 2 Years			
Most/all trips	6%	7%	5%
One/some trips	31%	42%	20%
No trips/not stated/not sure	63%	51%	75%
Desired Components of Packages			
(Among Purchasers of Packages)	(100%)	(100%)	(100%)
Accommodation	87%	96%	91%
Transport to destination	85%	89%	85%
Transport at destination	67%	74%	67%
Tickets for activities/attractions	66%	68%	62%
Food and beverage	59%	52%	52%
Other	39%	26%	22%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 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 Snowmobilers is the trip's ability to provide a **break from their day-to-day** realities (see Table 21).²⁵ Three-quarters of this niche market attach a high level of importance to this benefit and almost the same number want a vacation to **relieve stress**. About three-fifths expect the vacation to be the basis of lasting **memories**. A holiday should also help **enrich familial relationships** and have **no fixed schedule** according to approximately one-half of Snowmobilers. These are, for the most part, 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 Snowmobilers, Recent Pleasure Tourists to British Columbia and Any Destination²⁶

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

While not widely endorsed, **being challenged physically**²⁷ is deemed to be a highly important benefit of vacations for about one-fifth of Snowmobilers (22%). Perhaps because Snowmobilers are younger than recent tourists to the province, this is a much higher level of endorsement than is found among recent tourists to British Columbia (14%) or the U.S. travelling public as a whole (12%). In contrast, Snowmobilers are less apt than tourists with recent experience in British Columbia to consider expanding their knowledge of other cultures and places, intellectual stimulation or enriching perspectives among important benefits of travel.

The same benefits are **least** likely to be deemed *highly important* to American Snowmobilers, recent visitors to British Columbia and *all* U.S. travellers. These less sought outcomes of vacations include solitude and isolation and pampering.

²⁵ 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*.

²⁶ For full array, see Table 21.

²⁷ *To be challenged physically/feel physically energized.*

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

	Snowmobilers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
<i>% Stating "Highly Important"</i>			
<i>In rank order by Snowmobilers</i>			
Break from day-to-day environment	78%	62%	72%
Relax/relieve stress	73%	62%	72%
Create lasting memories	62%	60%	58%
Enrich relationship with partner/children	55%	52%	55%
No fixed schedule	52%	41%	53%
See/do something new/different	44%	59%	43%
Keep family ties alive	40%	38%	46%
Enrich perspectives	27%	36%	23%
Renew personal connections (non-family)	25%	19%	19%
Physical challenge	22%	14%	12%
Knowledge of history, cultures, places	19%	36%	20%
Stories to share	18%	13%	13%
Stimulate mind/intellectual challenge	17%	29%	19%
Solitude and isolation	17%	11%	12%
To be pampered	16%	15%	15%

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

Presumably, *all* Snowmobilers took at least one overnight pleasure trip during a time period in which snowmobiling was available as a trip activity in a destination they visited yet only about 9-in-10 say they took a *winter* trip in the past two years (88%) (see Table 22). Those who claimed not to have taken a “winter” trip may be using a *calendar* rather than a *weather condition* definition of this season. For example, snowmobiling is available in many parts of the northern U.S.A. and Canada in March – the month in which winter officially ends and spring begins.²⁸

Almost all Snowmobilers also say that they have taken an overnight pleasure trip during the summer months (90%).

TABLE 22: INCIDENCE OF SUMMER/ WINTER PLEASURE TRIPS	Snowmobilers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected	1,712,000	5,340,000	166,003,000
Took Overnight Pleasure Trip in Past 2 Years In . . .			
Summer	90%	90%	82%
Winter	88%	81%	62%

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

²⁸ The TAMS questionnaire does not provide guidance to the respondent about which months are to be included in either *winter* or *summer* leaving open the possibility of different interpretations and/or respondent error.

D. Memberships in Various Organizations

Auto club membership is characteristic of approximately 2-in-5 Snowmobilers (see Table 23). About 1-in-3 of these tourists are members of a frequent flyer program and about one-quarter claim to have memberships in a hotel or car rental loyalty program and/or sports club.

TABLE 23: MEMBERSHIPS	Snowmobilers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected <i>In rank order by Snowmobilers</i>	1,712,000	5,340,000	166,003,000
Auto club	43%	59%	43%
Frequent flyer program	35%	62%	31%
Hotel/car rental loyalty program	23%	40%	20%
Sports club	23%	26%	16%
Community service club	16%	18%	10%
Book/reading club	14%	13%	11%
Hobby club	11%	9%	6%
Travel club	9%	11%	4%
Nature/environmental club	8%	9%	5%

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

E. Ownership of Equipment

About half of American Snowmobilers claim to own their own sled (48%). This level of snowmobile ownership is, not surprisingly, dramatically higher than is the case within the U.S. travelling public as a whole (3%) or the subset with recent travel experience in British Columbia (4%). Not only are Snowmobilers especially likely to own a snowmobile, but they are also much more likely to own ATVs (38%) and motorhomes/RVs (30%) than are typical American tourists or those who have recently travelled to British Columbia.

TABLE 24: EQUIPMENT OWNERSHIP	Snowmobilers	All U.S. Pleasure Tourists	
	Total	To British Columbia	Any Destination
Unweighted base	(539)	(1,706)	(45,697)
Weighted, Projected <i>In rank order by Snowmobilers</i>	1,712,000	5,340,000	166,003,000
Snowmobile	48%	4%	3%
All-terrain vehicle (ATV)	38%	9%	11%
Motor home, camper, RV	30%	17%	13%
Canoe/kayak	19%	12%	8%
Motor boat	12%	15%	14%
Sailboat	5%	4%	2%

Source: TAMS U.S. Special Tabulations, prepared for Tourism British Columbia by Research Resolutions, Volume 4, page 45. "All U.S. Pleasure Tourists" are Americans 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years or so. "To British Columbia" is the subset of "All U.S. Pleasure Tourists" who have taken at least one overnight pleasure trip to British Columbia in the past two years or so.

IX. Appendices

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

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

Alberta Tourism, Parks, Recreation and Culture ²⁹	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.

²⁹ Formerly *Alberta Economic Development*.

B. Trip Activity Sector Definitions

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

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

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

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

Maine
New Hampshire
Vermont
Massachusetts

Connecticut

Rhode Island

Middle Atlantic

New York State

Pennsylvania

New Jersey

South Atlantic

Maryland

Delaware

Washington DC

West Virginia

Virginia

North Carolina

South Carolina

Georgia

Florida

East North Central

Wisconsin

Michigan

Illinois

Indiana

Ohio

West North Central

North Dakota

South Dakota

Minnesota

Iowa

Nebraska

Kansas

Missouri

East South Central

Kentucky

Tennessee

Mississippi

Alabama

West South Central

Oklahoma

Arkansas

Texas

Louisiana

Mountain

Montana

Idaho

Wyoming

Nevada

Utah

Colorado

New Mexico

Arizona

Pacific

Washington State

Oregon

California

Alaska**Hawaii**

D. TNS Canadian Facts' "Lifestages" Definitions

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

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

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

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

TABLE A2: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN & ANY*

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

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 Snowmobilers as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.

TABLE A3: OTHER INDIVIDUAL ACTIVITIES – MAIN & ANY*

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

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