

CANADIAN TRAVEL MARKET

**Out-of-Province Travel by
Residents of British Columbia**

A Profile Report

February 7, 2008

Prepared by Lang Research Inc. on behalf of:

Ontario Ministry of Tourism, Ontario Tourism Marketing Partnership Corporation, Quebec Ministry of Tourism,
Travel Manitoba, Canadian Tourism Commission, Tourism Saskatchewan, Atlantic Canada Tourism
Partnership, Alberta Tourism, Parks, Recreation and Culture, Department of Canadian Heritage, Tourism British
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Executive Summary

Over the last two years, 78.5% (2,611,359) of adult British Columbia residents took an out-of-province, overnight trip (for any purpose). 89.4% (2,334,739) of those who traveled outside of British Columbia took at least one out-of-province, pleasure trip in the past two years. Those taking out-of-province trips were more likely to have traveled outside of Canada (78.5%) than within Canada (58.8%). In terms of Canadian travel, British Columbians most often visited Alberta (50.9%). In terms of out-of-country travel, they most often visited the United States (66.3%) and overseas destinations (30.5%).

Relative to within-province travelers, out-of-province travelers are more likely to be 55 to 64 years old, married and without dependent children. Out-of-province travelers are also much more likely to have university degrees and higher household incomes. As such, affluent, mature couples are over-represented among out-of-province travelers.

Out-of-province travelers were much more active in culture and entertainment activities while on trips than within-province travelers. They were especially likely to have visited historical sites, museums and art galleries, to have attended live art performances and sporting events, to have gambled in casinos, to have taken part in a wine, beer or food tasting and to have visited spas while on trips. Out-of-province travelers were also much more likely to have played golf, gone skiing, taken part in fitness activities and participated in nature-oriented activities. On the other hand, within-province travelers more often went fishing, horseback riding and motorcycling while on trips. Out-of-province travelers most often stayed at resorts while within-province travelers were more likely to go camping. Out-of-province travelers were especially likely to have taken organized tours, city tours and scenic countryside drives. Within-province travelers rarely took organized tours and primarily took self-guided tours and scenic country-side drives.

Out-of-province travelers prefer luxurious vacations at culturally distinctive destinations that are both intellectually stimulating and physically challenging and that offer novelty and opportunities to learn. Within-province travelers prefer vacations that allow them to keep family ties alive, at destinations that are conveniently accessible by car, have a familiar culture and language, lots of activities for children and that have either budget-priced accommodation or camping available.

Out-of-province travelers are much more likely than within-province travelers to use the Internet to plan and book travel. Out-of-province travelers may be most effectively reached through travel media, cuisine-related media, sports media, city lifestyle magazines, business and finance magazines and soft rock radio stations. Within-province travelers may be best reached through home-oriented magazines, daytime soap operas and both alternative rock music and country music radio stations.

Out-of-Province Travel by Residents of British Columbia

Market Incidence

Over the last two years, 78.5% (2,611,359) of adult British Columbia residents took an out-of-province, overnight trip (for any purpose). 89.4% (2,334,739) of those who took a trip outside of British Columbia report that they took at least one out-of-province, pleasure trip during the past two years.

Overall, 87.7% of those who took a pleasure trip (i.e., Pleasure Travelers) report taking at least one pleasure trip outside of the province. British Columbia residents were the fourth most likely to take pleasure trips outside of their province during the last two years after residents of Manitoba, Saskatchewan and Alberta.

58.8% of British Columbia residents who took out-of-province pleasure trips reported visiting other Canadian destinations. 78.5% of those who took out-of-province pleasure trips went to destinations outside of Canada.

Fig. 1 Incidence of Trips¹ from British Columbia during the Past Two Years

	British Columbia
Number Taking a Trip Outside of the Province (Any Purpose) ²	2,611,359
Percent of Provincial Population	78.5%
Number Taking a Pleasure Trip Outside of Province ³	2,334,739
Percent of Pleasure Travelers in Province ⁴	87.7%
Percent Taking a Pleasure Trip to Another Canadian Destination Outside of Province ⁵	58.8%
Percent Taking a Pleasure Trip Outside of Canada ⁶	78.5%

- 1 - "Trips" are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.
- 2 - This row reports the number of British Columbia residents who took at least one overnight trip outside British Columbia in the last two years for any purpose.
- 3 - This row reports the number of British Columbia residents who took an out-of-province "pleasure trip" during the past two years.
- 4 - "Pleasure Travelers" are defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years. This row reports the percent of British Columbia "Pleasure Travelers" who took an out-of-province pleasure trip in the last two years.
- 5 - This row reports the percent of out-of-province, pleasure trips to other Canadian destinations.
- 6 - This row reports the percent of out-of-province, pleasure trips to destinations outside of Canada.

Demographic Profile

Relative to those who only took pleasure trips within the province, out-of-province travelers are over-represented among 55 to 64 year olds and married couples without dependent children. Out-of-province pleasure travelers are also much more likely to have a university degree (36.1% vs. 13.1%) and higher household incomes (\$75,345 vs. \$50,543). Accordingly, relatively affluent, mature couples are over-represented among those who took trips outside of British Columbia.

Fig. 2 Demographic Profile of British Columbia Residents Who Took an Out-of-Province Trip

Attribute	Size of Market	Took a Pleasure Trip Outside of British Columbia	Only Took Pleasure Trips Within British Columbia ¹	Total Pleasure Travelers in British Columbia	Index ²
		2,334,739	327,682	2,662,421	100
Gender	Male	49.2%	46.0%	48.8%	101
	Female	50.8%	54.0%	51.2%	99
Age of Respondent	18 to 24	12.5%	14.7%	12.8%	98
	25 to 34	18.0%	20.6%	18.3%	98
	35 to 44	18.8%	19.7%	18.9%	99
	45 to 54	20.5%	21.2%	20.6%	100
	55 to 64	15.6%	9.5%	14.9%	105
	65 Plus	14.5%	14.5%	14.5%	100
Average Age		45.6	43.8	45.4	N/A
Marital Status	Not married	31.4%	38.8%	32.3%	97
	Married	68.6%	61.2%	67.7%	101
Parental Status	No children under 18	73.8%	65.6%	72.8%	101
	Children under 18	26.2%	34.4%	27.2%	96
Education	High school or less	32.5%	54.8%	35.3%	92
	Some post-secondary	10.7%	19.9%	11.8%	90
	Post-secondary diploma/certificate	20.7%	12.2%	19.6%	105
	University degree	36.1%	13.1%	33.2%	109
Household Income	Under \$20,000	4.6%	14.2%	5.8%	80
	\$20,000 to \$39,999	14.4%	26.6%	15.9%	91
	\$40,000 to \$59,999	15.1%	12.2%	14.7%	102
	\$60,000 to \$79,999	15.8%	25.1%	17.0%	93
	\$80,000 to \$99,999	10.6%	7.8%	10.3%	103
	\$100,000 or more	25.5%	4.5%	23.0%	111
	Not stated	13.9%	9.6%	13.3%	104
Average Household Income		\$75,346	\$50,543	\$72,162	N/A

- 1 - "Only Took Pleasure Trips Within British Columbia" is defined as individuals who took at least one out-of-town, overnight pleasure trip in the last two years but did not take a trip outside of the province.
- 2 - The "Index" is calculated by dividing the percent for those who took an out-of-province trip by the total percent of pleasure travelers in each group. The Index indicates the extent to which out-of-province pleasure travelers are over or under-represented relative to all pleasure travelers in the province. An index of 100 means the percent of out-of-province travelers is the same as that of the average pleasure traveler. Index values over 100 indicate that out-of-province travelers are over-represented relative to the average pleasure traveler in the province. Index values less than 100 indicate that out-of-province travelers are under-represented relative to the average pleasure traveler in the province.

Travel Activity (During Last Two Years)

85.2% of those who took a trip outside of British Columbia also took a trip within the province during the last two years. In terms of Canadian travel, 51.4% took an out-of-province trip to an adjacent province or territory, most often Alberta (50.9%). 39.9% took a trip to a non-adjacent province or region and were most likely to have visited Ontario (24.8%), Saskatchewan (12.2%) and Quebec (12.1%).

In terms of out-of-country travel, British Columbians primarily took trips to the United States (66.3%). However, 23.3% traveled to Mexico, 30.5% took an overseas trip and 9.4% visited the Caribbean during the last two years.

Fig. 3 Percent Traveling to Other Canadian Destinations during Past Two Years

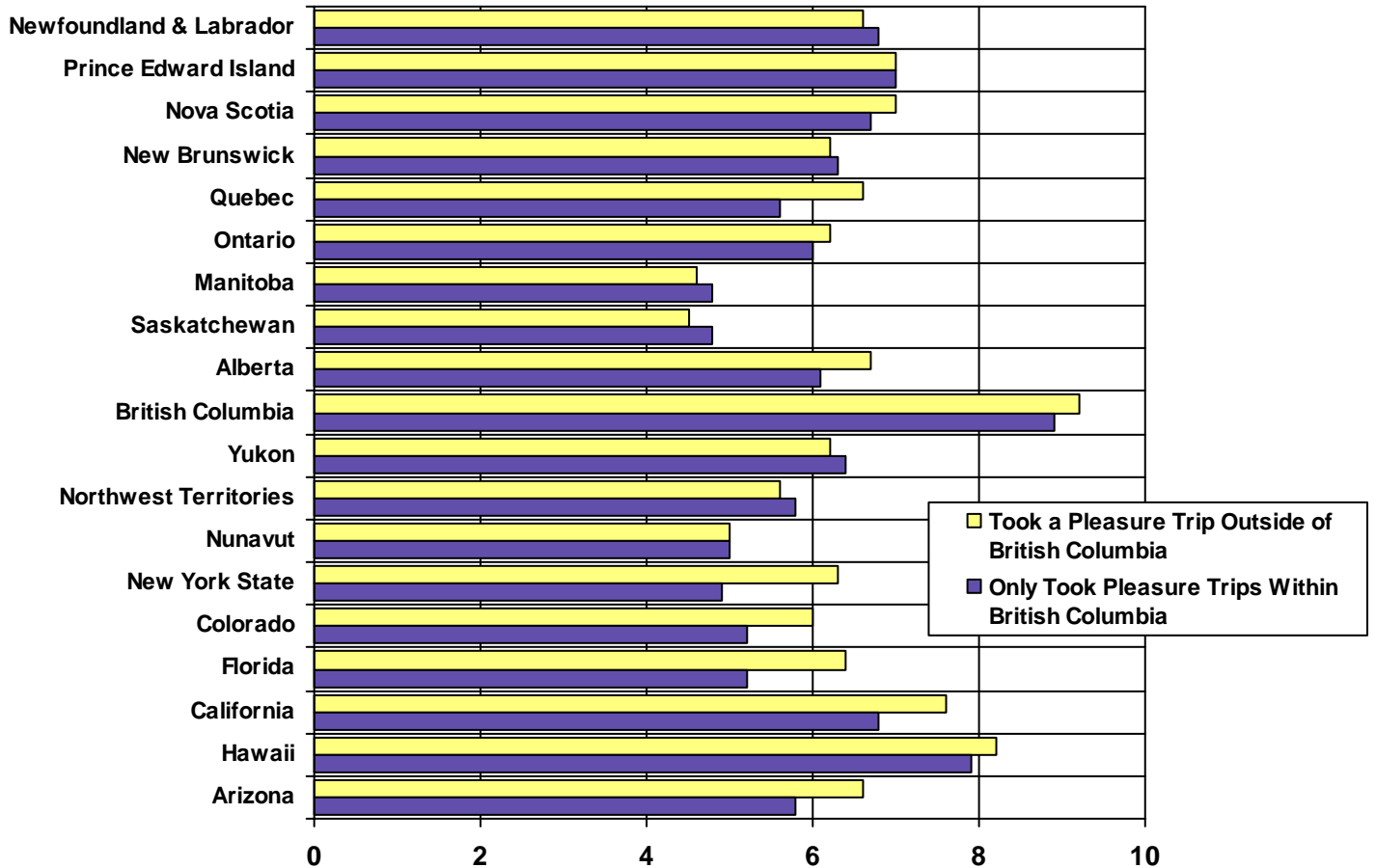
	Took a Pleasure Trip Outside of British Columbia	Only Took Pleasure Trips Within British Columbia	Total Pleasure Travelers in British Columbia
Size of Market	2,334,739	327,682	2,662,421
Canada	94.9%	100.0%	95.5%
Took a trip within own province/ region	85.2%	100.0%	87.0%
Took a trip to an adjacent province/ region	51.4%	0.0%	45.1%
Took a trip to non-adjacent province/ region	39.9%	0.0%	35.0%
Newfoundland & Labrador	1.2%	0.0%	1.0%
Prince Edward Island	2.8%	0.0%	2.5%
New Brunswick	5.3%	0.0%	4.7%
Nova Scotia	3.1%	0.0%	2.7%
Quebec	12.1%	0.0%	10.6%
Ontario	24.8%	0.0%	21.7%
Manitoba	9.0%	0.0%	7.9%
Saskatchewan	12.2%	0.0%	10.7%
Alberta	50.9%	0.0%	44.6%
British Columbia	85.2%	100.0%	87.0%
Yukon	3.4%	0.0%	2.9%
Northwest Territories	1.6%	0.0%	1.4%
Nunavut	0.3%	0.0%	0.2%
United States	66.3%	0.0%	58.1%
Mexico	23.3%	0.0%	20.5%
Caribbean	9.4%	0.0%	8.2%
All other destinations	30.5%	0.0%	26.7%

Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

The respondents were asked to rate the appeal of each of Canada's provinces and territories on a ten-point appeal scale where "10" is "Very Appealing" and "1" is "Very Unappealing". They were also asked to rate selected U.S. states (New York State, Colorado, Florida, California, Hawaii and Arizona) to provide a frame of reference.

Out-of-province travelers perceive several Canadian destinations (e.g., British Columbia, Alberta, Ontario, & especially Quebec) to be slightly more appealing than do those who traveled exclusively within the province. Out-of-province travelers also have a more favourable impression of all six U.S. reference states than do within-province travelers. It is not possible to determine whether these attitudinal differences are the result of their travel activities or one the reasons why they travel outside of British Columbia.

Fig. 4 Overall Appeal Ratings of Provinces, Territories and Selected U.S. States on a 10-Point Appeal Rating Scale (Higher Scores=More Appealing)



Culture and Entertainment Activities Pursued While on Trips

British Columbia residents who took a trip outside of the province were much more likely to have participated in culture and entertainment activities while on trips than those who only took trips within the province. Out-of-province travelers were especially like to have gone shopping and dining and to have visited historical sites, museums and art galleries, festival and fairs and theme parks while on trips. They were also more likely than within-province travelers to have attended live art performances (e.g., high art performances, live theatre, music concerts) and sporting events (e.g., professional sporting events), to have gambled in casinos, to have taken part in a wine, beer or food tasting, to have participated in aboriginal cultural experiences and to have visited spas while on trips. These differences partially reflect the fact that out-of-province travelers are more affluent and better able to afford such activities.

Fig. 5 Culture and Entertainment Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Culture & Entertainment Activity)

	Took a Pleasure Trip Outside of British Columbia	Only Took Pleasure Trips Within British Columbia	Total Pleasure Travelers in British Columbia	Index
Size of Market	2,334,739	327,682	2,662,421	100
Shopping & Dining	89.1%	69.2%	86.7%	103
Historical Sites, Museums & Art Galleries	65.4%	46.1%	63.1%	104
Fairs & Festivals	44.0%	20.8%	41.2%	107
Theme Parks & Exhibits	42.4%	23.4%	40.1%	106
Musical Concerts, Festivals & Attractions	32.1%	23.7%	31.1%	103
Wine, Beer & Food Tastings	31.8%	8.5%	28.9%	110
Casinos	27.1%	15.3%	25.7%	106
Science & Technology Exhibits	24.7%	18.4%	24.0%	103
Aboriginal Cultural Experiences	21.0%	8.9%	19.5%	108
Garden Theme Attractions	20.9%	13.1%	19.9%	105
Professional Sporting Events	17.9%	9.1%	16.8%	106
Live Theatre	17.9%	6.6%	16.5%	108
Agro-Tourism	17.4%	11.3%	16.7%	105
Spas	12.9%	3.0%	11.7%	110
High Art Performances	11.4%	4.0%	10.5%	109
Amateur Tournaments	9.9%	9.9%	9.9%	100
Participatory Historical Activities	8.8%	4.9%	8.4%	106
Comedy Festivals & Clubs	7.8%	8.0%	7.9%	100
Equestrian & Western Events	7.8%	5.7%	7.6%	104
Literary & Film Festivals	3.6%	1.4%	3.3%	108
National & International Sporting Events	3.2%	0.3%	2.8%	113

Culture and Entertainment Activities Pursued While Not on Trips

Out-of-province travelers are also more active in local culture and entertainment activities while not traveling than those who traveled exclusively within the province. Out-of-province travelers are especially likely to patronize local live art performances (e.g., the opera, the ballet, classical music concerts, live theatre, jazz clubs, rock concerts), to attend professional sports events and to stay overnight in a local hotel or B&B. They are also more likely to visit local museums and art galleries as well as local zoos and aquariums, local botanical gardens and local amusement or theme parks. By contrast, those who traveled exclusively within the province during the last two years are more likely to attend local rodeos and local festivals and fairs. Once again, these differences may reflect the relative affluence of out-of-province travelers.

Fig. 6 Culture and Entertainment Activities Pursued While Not on Trips

	Took a Pleasure Trip Outside of British Columbia	Only Took Pleasure Trips Within British Columbia	Total Pleasure Travelers in British Columbia	Index
Size of Market	2,334,739	327,682	2,662,421	100
Going out to eat in restaurants	92.0%	85.4%	91.2%	101
Going to festivals or fairs	61.4%	70.9%	62.6%	98
Going to pick-your-own farms or farmers' market	44.3%	43.4%	44.2%	100
Going to amateur sporting events	44.1%	40.2%	43.6%	101
Going to historic sites or heritage buildings	39.4%	41.9%	39.7%	99
Going to live theatre	36.3%	20.1%	34.3%	106
Going to museums	35.6%	28.0%	34.7%	103
Going to art galleries or art shows	34.6%	27.0%	33.6%	103
Going to professional sporting events	34.0%	22.5%	32.6%	104
Going to zoos or aquariums	31.8%	22.5%	30.6%	104
Going to botanical gardens	28.0%	21.6%	27.2%	103
Going to bars with live pop or rock bands	27.0%	21.6%	26.3%	102
Going dancing	25.8%	21.5%	25.3%	102
Going to amusement or theme parks	25.8%	19.6%	25.0%	103
Going to rock music concerts	22.6%	16.6%	21.8%	103
Going to classical music concerts	20.3%	8.1%	18.8%	108
Going to gamble in casinos	19.0%	19.0%	19.0%	100
Going to day spas	14.6%	8.3%	13.8%	106
Staying overnight in a hotel or B&B in own city	10.5%	6.8%	10.0%	105
Going to jazz clubs	9.5%	3.6%	8.7%	108
Going to the opera	9.0%	2.9%	8.3%	109
Going to the ballet	8.4%	4.1%	7.9%	107
Going to rodeos	7.8%	11.6%	8.2%	94

Outdoor Activities Pursued While on Trips

Despite their relative maturity, out-of-province travelers were much more active in outdoor activities while on trips than within-province travelers. Relative to within-province travelers, out-of-province travelers were especially likely to have taken part in resort-based, water activities (e.g., ocean activities, sailing & surfing, scuba diving and snorkeling). They were also more likely to have played golf, gone skiing (e.g., downhill skiing, cross-country skiing), taken part in fitness activities (e.g., exercising and jogging, cycling) and to have participated in nature-oriented activities (e.g., wildlife viewing, hiking, climbing, paddling) while on trips. On the other hand, those who traveled exclusively within the province were more likely to have gone fishing, horseback riding and motorcycling while on trips during the last two years.

Fig. 7 Outdoor Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Outdoor Activity)

	Took a Pleasure Trip Outside of British Columbia	Only Took Pleasure Trips Within British Columbia	Total Pleasure Travelers in British Columbia	Index
Size of Market	2,334,739	327,682	2,662,421	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	53.7%	36.9%	51.6%	104
Wildlife Viewing	47.4%	36.7%	46.1%	103
Boating & Swimming (e.g., motorboating, swimming in lakes)	40.6%	32.4%	39.6%	103
Hiking, Climbing & Paddling	39.5%	34.4%	38.8%	102
Fishing	21.4%	30.8%	22.6%	95
Sports & Games (e.g., tennis, board games)	21.3%	14.0%	20.4%	104
Exercising & Jogging	19.8%	13.4%	19.0%	104
Golfing	19.1%	5.8%	17.5%	109
Downhill Skiing & Snowboarding	17.8%	8.1%	16.6%	107
Cycling	15.5%	10.4%	14.8%	104
Team Sports (e.g., hockey, baseball)	10.3%	6.7%	9.8%	104
Snowmobiling & ATVing	9.6%	5.7%	9.1%	105
Skating (e.g., ice skating, rollerblading)	9.0%	5.1%	8.5%	106
Cross-country Skiing & Snowshoeing	8.5%	5.5%	8.1%	105
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	6.5%	2.2%	6.0%	109
Horseback Riding	5.5%	6.8%	5.7%	97
Hunting	4.6%	3.6%	4.5%	103
Wilderness Activities (e.g., wilderness skills course)	3.8%	0.8%	3.4%	111
Freshwater Scuba & Snorkeling	3.4%	2.3%	3.2%	104
Motorcycling	3.0%	6.6%	3.4%	87
Extreme Air Sports (e.g., parachuting)	1.8%	0.2%	1.6%	112

Outdoor Activities Pursued While Not on Trips

Both out-of-province travelers and within-province travelers are active in outdoor activities while NOT traveling. However, those who traveled outside of British Columbia are more likely to go downhill skiing and snowboarding, golfing and canoeing and kayaking. They are also more likely to exercise and jog and to take part in team sports. By contrast, within-province travelers are more likely to participate in sportsmen activities (e.g., fishing, hunting) and nature-oriented activities such as camping and hiking. They are also more likely to garden, picnic, go cross-country skiing and ride an ATV while not traveling. Many of the activities more likely to be undertaken by within-province travelers are more common in rural areas or small towns. This may suggest that those who live in smaller towns or rural areas are less likely to take trips outside of British Columbia than those who live in larger urban centers.

Fig. 8 Outdoor Activities Pursued While NOT on Trips

	Took a Pleasure Trip Outside of British Columbia	Only Took Pleasure Trips Within British Columbia	Total Pleasure Travelers in British Columbia	Index
Size of Market	2,334,739	327,682	2,662,421	100
Day outing to a park	78.0%	74.0%	77.5%	101
Exercising at home or at a fitness club	67.0%	60.0%	66.1%	101
Gardening	61.5%	78.4%	63.5%	97
Swimming	60.7%	60.4%	60.6%	100
Picnicking	59.9%	70.7%	61.2%	98
Hiking	54.1%	60.1%	54.9%	99
Camping	43.3%	57.5%	45.0%	96
Cycling	41.5%	46.8%	42.1%	98
Jogging	30.4%	20.9%	29.3%	104
Golfing	27.9%	21.8%	27.2%	103
Sailing or other boating	27.8%	31.2%	28.2%	98
Fishing	27.2%	38.0%	28.5%	95
Playing team sports	23.6%	15.0%	22.6%	105
Playing racquet sports (e.g., tennis or badminton)	21.1%	20.5%	21.1%	100
Ice-skating	20.8%	18.5%	20.5%	101
Canoeing or kayaking	18.0%	13.3%	17.4%	103
Downhill skiing	17.2%	11.4%	16.4%	104
Rollerblading	10.7%	5.5%	10.1%	106
Riding an all-terrain vehicle (ATV)	9.9%	19.8%	11.1%	89
Cross-country skiing	8.9%	14.1%	9.6%	93
Snowboarding	7.7%	2.9%	7.1%	108
Hunting	6.6%	10.9%	7.1%	93
Horseback riding	6.3%	7.0%	6.4%	99
Snowmobiling	4.9%	2.6%	4.6%	106
Skateboarding	1.8%	2.3%	1.9%	97

Accommodation Stayed In While on Trips

Out-of-province travelers were much more likely than those who traveled exclusively within British Columbia to have stayed at resorts (e.g., seaside resorts, lakeside or riverside resorts, ski or mountain resorts) in the last two years. They were also more likely to have toured in a motor home or RV and to have stayed at accommodation specializing in fine cuisine (e.g., inns or resorts with gourmet dining, cooking or wine tasting schools). On the other hand, those who traveled exclusively within the province most often went camping (e.g., public campgrounds, private campgrounds, wilderness campsites). This pattern may also reflect the increased affluence of out-of-province travelers.

Fig. 9 Accommodation Stayed In While on Trips

	Took a Pleasure Trip Outside of British Columbia	Only Took Pleasure Trips Within British Columbia	Total Pleasure Travelers in British Columbia	Index
Size of Market	2,334,739	327,682	2,662,421	100
A Public Campground in a National, State, Provincial or Municipal Park	31.3%	32.7%	31.4%	99
Seaside Resort	29.7%	13.2%	27.7%	107
Lakeside / Riverside Resort	25.8%	7.4%	23.6%	110
A Private Campground	22.0%	21.6%	22.0%	100
Ski Resort or Mountain Resort	20.7%	10.7%	19.5%	106
A Camp Site in a Wilderness Setting (Not a Campground)	13.0%	16.2%	13.4%	97
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	7.3%	3.4%	6.8%	107
Health Spa	5.8%	2.0%	5.3%	109
Farm or Guest Ranch	5.3%	4.4%	5.2%	102
Wilderness Lodge You Can Drive to by Car	5.2%	2.4%	4.8%	107
Country Inn or Resort with Gourmet Restaurant	4.8%	3.4%	4.6%	104
Remote or Fly-In Wilderness Lodge	2.2%	2.4%	2.2%	99
On a Houseboat	1.8%	2.2%	1.9%	97
Remote or Fly-In Wilderness Outpost	1.0%	0.3%	0.9%	109
Wine Tasting School	0.8%	0.0%	0.7%	114
Cooking School	0.3%	0.0%	0.3%	114

Tours and Cruises Taken During Past Two Years

British Columbia residents who took an out-of-province trip were much more likely to have taken tours and cruises during the last two years than were within-province travelers. They were especially likely to have taken organized sameday and multi-location tours, city tours and scenic countryside drives. They were also more likely to have taken self-guided sameday or multi-location tours, tours of wineries, factories and casinos and wilderness tours during the past two years. Out-of-province travelers were also more likely to have taken freshwater cruises and ocean cruises during the last two years. Those who exclusively traveled within British Columbia rarely took organized tours and primarily took self-guided tours and scenic drives in the countryside.

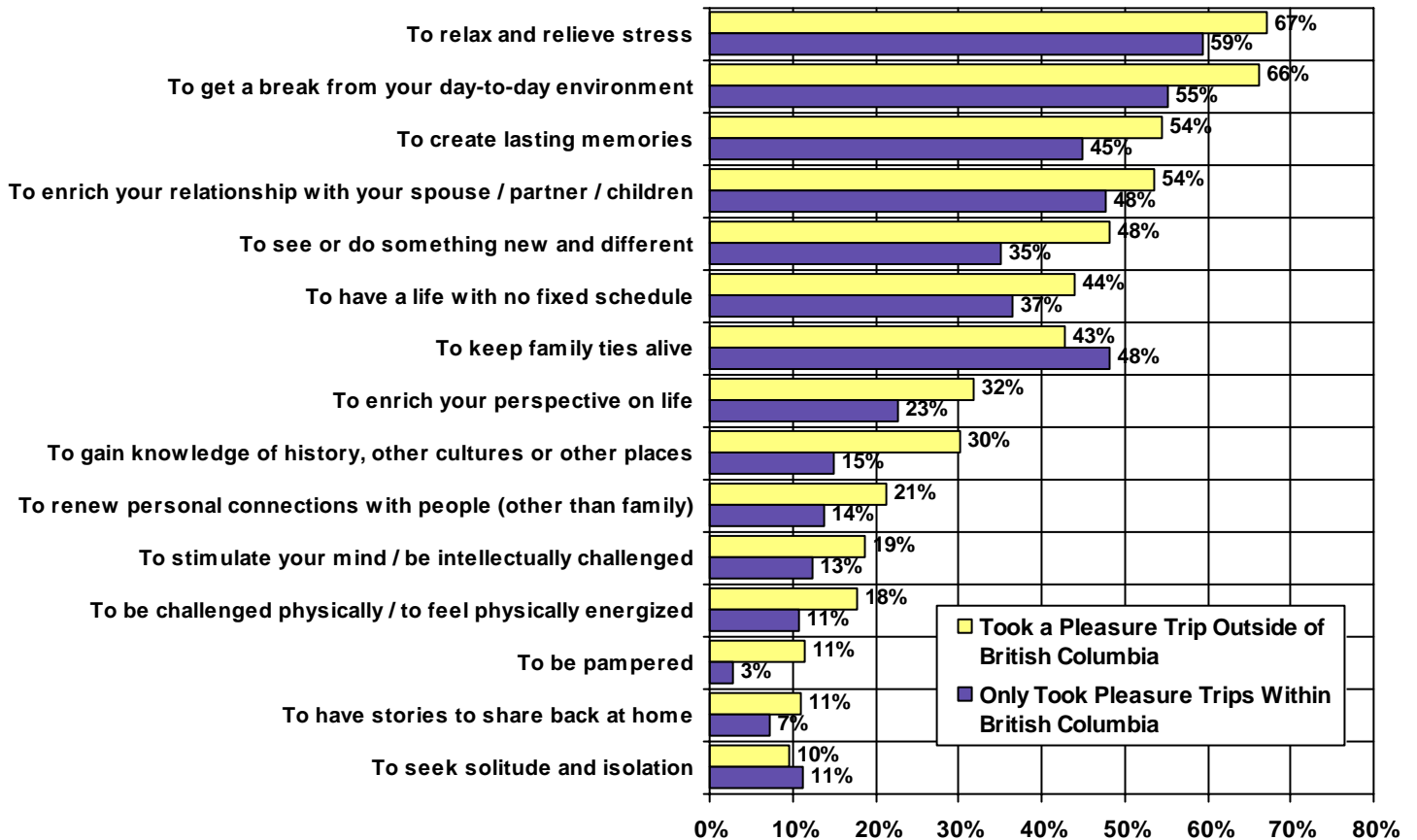
Fig. 10 Tours and Cruises Taken During Past Two Years

	Took a Pleasure Trip Outside of British Columbia	Only Took Pleasure Trips Within British Columbia	Total Pleasure Travelers in British Columbia	Index
Size of Market	2,334,739	327,682	2,662,421	100
A self-guided, sameday tour while on an overnight trip	33.6%	13.4%	31.1%	108
Around the city	29.3%	7.3%	26.6%	110
An organized, sameday guided tour while on an overnight trip	28.1%	3.8%	25.1%	112
Around the countryside - scenic drives	25.1%	9.6%	23.2%	108
A self-guided, overnight tour where you stayed in different locations	21.6%	15.9%	20.9%	103
Some other type of tour	16.3%	4.5%	14.9%	110
On the water (sightseeing cruise)	14.1%	3.2%	12.8%	111
Wilderness tour	12.6%	7.4%	12.0%	105
An organized,overnight guided tour where you stayed in different locations	12.2%	1.2%	10.8%	112
An organized, overnight guided tour where you stayed in a single location	9.1%	1.8%	8.2%	111
To a winery	7.7%	1.4%	7.0%	111
Ocean cruise - Other	6.9%	0.8%	6.2%	112
To a casino	6.5%	1.1%	5.9%	111
Alaskan ocean cruise	4.7%	0.0%	4.2%	112
To a factory	4.1%	0.6%	3.7%	112
Caribbean ocean cruise	4.0%	0.0%	3.6%	113
In the air as a pilot or passenger of an airplane or helicopter	3.3%	0.4%	3.0%	112
Some other type of cruise	2.4%	0.3%	2.1%	112
Cruise on another lake or river	1.1%	2.1%	1.2%	90
Submarine cruise	0.1%	0.0%	0.1%	114
Cruise on the St. Lawrence River	0.1%	0.0%	0.1%	114
Great Lakes cruise	0.1%	0.0%	0.1%	109

Benefits Sought While on Vacation

As with most Canadian Pleasure Travelers, British Columbian Pleasure Travelers tend to take vacations to relax and relieve stress, get a break from their day-to-day environment, to create lasting memories and to enrich their relationships with family members. However, those who took trips outside of the province are more likely to prefer vacations that are both intellectually stimulating and physically challenging, offer opportunities to learn (e.g., learn about the history and culture of the destination) and novelty (i.e., to see and do something new), allow them to be pampered and allow them to renew connections with their friends. By contrast, those who travel exclusively within the province are more likely to prefer vacations that allow them to keep family ties alive.

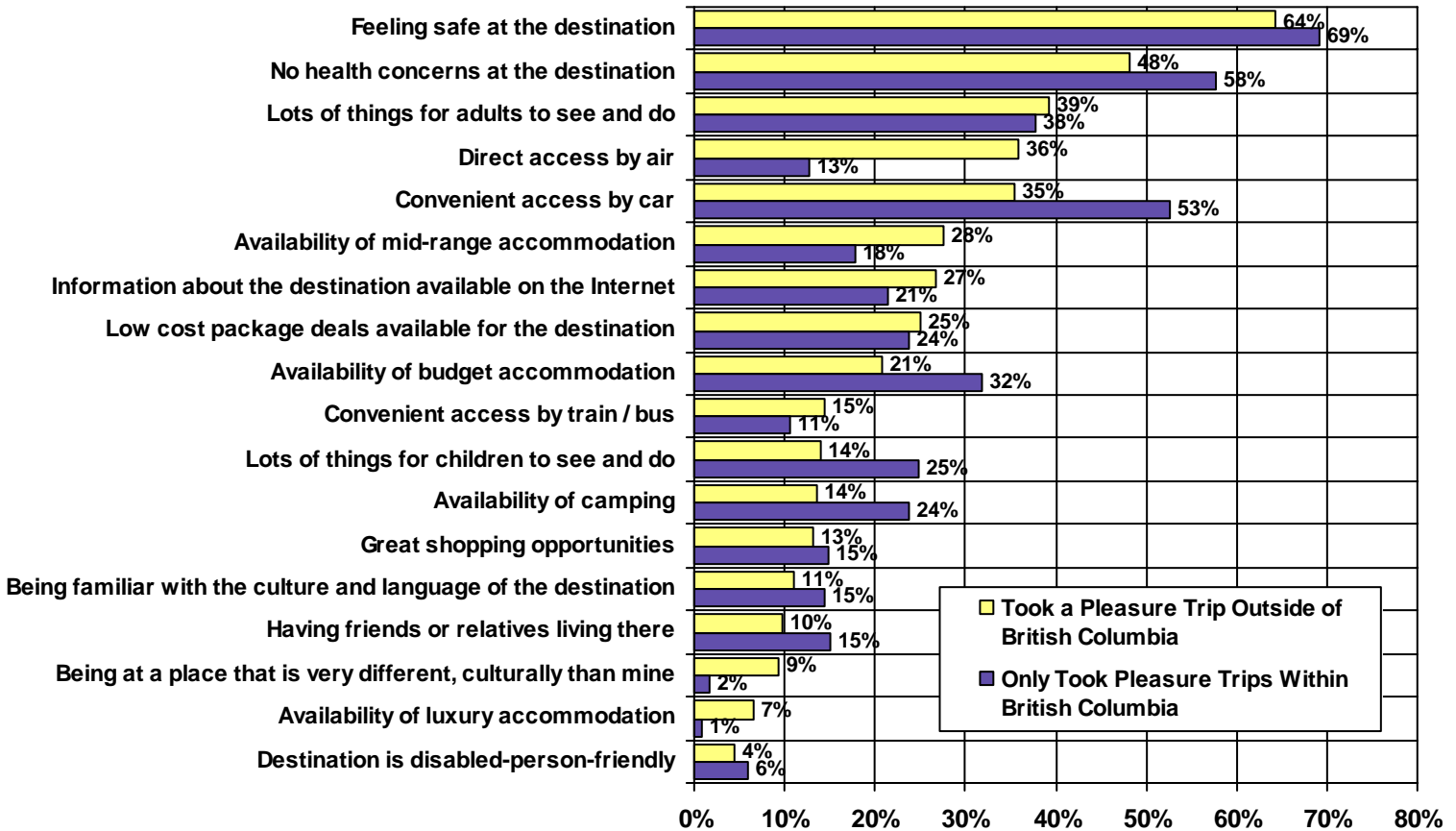
Fig.11 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, British Columbian Pleasure Travelers consider it important that they feel safe at a destination. However, those who took trips outside of the province are more likely to value destinations that are culturally distinctive, directly accessible by air train or bus, offer either luxury or mid-range priced accommodation and provide information on the Internet. By contrast, those who only took trips within British Columbia consider it more important that a destination is conveniently accessible by car, has a familiar culture and language, has lots of activities for children and either budget priced accommodation or camping available. Within-province travelers are also more likely to look for destinations that have family or friends living nearby.

Fig. 12 Importance of Destination Attributes (% Rating Each Attribute as "Highly Important")



How Destinations Are Selected

Out-of-province travelers are more likely to begin planning vacations with a particular destination in mind than are those who only travel within the province. In contrast, within-province travelers are more likely to plan a vacation by considering what activities they would like to do. This may reflect the fact that within-province travelers are more likely to visit the same destinations on repeated occasions than do out-of-province travelers.

Fig. 13 How Destinations Are Selected (Summer and Winter Vacations)

	Took a Pleasure Trip Outside of British Columbia	Only Took Pleasure Trips Within British Columbia	Total Pleasure Travelers in British Columbia	Index
Size of Market	2,334,739	327,682	2,662,421	100
Summer				
Started with a desired destination in mind	54.8%	45.2%	53.7%	102
Started by considering specific activities wanted to do	9.5%	15.4%	10.2%	93
Started with a certain type of vacation experience in mind	24.1%	25.7%	24.3%	99
Looked for packaged deals - no destination in mind	0.6%	0.8%	0.7%	97
Considered something else first	5.7%	1.1%	5.2%	110
Don't know / Other	5.3%	11.8%	6.0%	87
Winter				
Started with a desired destination in mind	53.3%	38.3%	52.1%	102
Started by considering specific activities wanted to do	13.0%	24.9%	14.0%	93
Started with a certain type of vacation experience in mind	22.4%	28.6%	22.9%	98
Looked for packaged deals - no destination in mind	2.1%	0.9%	2.0%	105
Considered something else first	3.9%	4.3%	3.9%	99
Don't know / Other	5.3%	3.0%	5.1%	104

Trip Planning and Information Sources Consulted

Out-of-province travelers are more likely than within-province travelers to be solely or partially responsible for planning their trips (62.2% versus 52.1%). They also tend to consult a wider range of travel information. Most out-of-province travelers use the Internet, word-of-mouth and past experience to plan their trips. However, relative to within-province travelers, those who traveled outside of the province are also much more likely to obtain travel information from the Internet, travel agents, travel guide books such as Fodor's, auto clubs, the official government tourism guides, maps, newspaper or magazine articles and advertising, television programs, direct mail, email newsletters and trade, travel or sports shows. On the other hand, within-province travelers are more likely to obtain travel information from television advertising.

Fig. 14 Who Plans Vacations and Information Sources Consulted

		Took a Pleasure Trip Outside of British Columbia	Only Took Pleasure Trips Within British Columbia	Total Pleasure Travelers in British Columbia	Index
Size of Market		2,334,739	327,682	2,662,421	100
Who Plans Trips?	Respondent plans trips	44.1%	39.0%	43.5%	101
	Trip planning a shared responsibility	18.1%	13.1%	17.6%	103
	Someone else plans trips	37.7%	47.9%	38.9%	97
Information Sources Consulted	An Internet website	73.6%	44.6%	70.3%	105
	Advice of others / Word-of-mouth	54.8%	41.0%	53.2%	103
	Past experience / Been there before	54.3%	40.6%	52.7%	103
	A travel agent	43.9%	3.4%	39.2%	112
	Maps	39.5%	27.7%	38.1%	104
	Official travel guides or brochures from state / province	24.5%	16.1%	23.5%	104
	Visitor information centres	23.8%	20.8%	23.5%	102
	Articles in newspapers / magazines	22.5%	9.7%	21.0%	107
	An auto club such as CAA	20.5%	4.6%	18.6%	110
	Travel guide books such as Fodor's	19.4%	2.1%	17.4%	112
	Advertisements in newspapers / magazines	14.0%	5.3%	13.0%	108
	Programs on television	10.7%	5.5%	10.1%	106
	Travel information received in the mail	5.8%	2.8%	5.4%	106
	An electronic newsletter or magazine received by e-mail	4.9%	0.9%	4.5%	111
	Advertisements on television	4.3%	7.2%	4.6%	93
Visits to trade, travel or sports shows	2.2%	1.1%	2.0%	106	

Use of the Internet to Plan and Arrange Trips

British Columbia residents who took a trip outside of the province are much more likely to have used the Internet to plan (69.5%) and book travel (51.5%) than those who did not take a trip outside of the province (39.0% plan, 16.9% book). The difference between those traveling and those not traveling outside the province is especially reflected in their respective use of airline websites (62.2% versus 7.7%) and travel planning or booking websites (52.0% versus 8.4%). Out-of-province travelers are also much more likely to use hotel or resort websites and cruise line websites. As with most Canadian Pleasure Travelers, British Columbians most often booked airline tickets and accommodation online. However, out-of-province travelers are also more likely to arrange car rentals and to buy travel packages online. On the other hand, those who traveled exclusively within the province are more likely to consult and purchase tickets from the websites of specific attractions.

Fig. 15 Use of the Internet to Plan and Book Travel

		Took a Pleasure Trip Outside of British Columbia	Only Took Pleasure Trips Within British Columbia	Total Pleasure Travelers in British Columbia	Index
Size of Market		2,334,739	327,682	2,662,421	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	30.4%	61.0%	34.2%	89
	Uses Internet to plan trips only	18.0%	22.1%	18.5%	97
	Uses Internet to book part of trip	51.5%	16.9%	47.3%	109
Types of Websites Consulted	An airline website	62.2%	7.7%	58.2%	107
	A website of a hotel or resort	61.3%	29.8%	59.0%	104
	A travel planning / booking website	52.0%	8.4%	48.8%	107
	A tourism website of a country/region/city	45.8%	43.2%	45.6%	100
	A website of an attraction	31.6%	40.9%	32.3%	98
	Some other website	26.0%	43.9%	27.3%	95
	A cruise line website	8.8%	0.8%	8.2%	107
	A motorcoach website	2.3%	1.5%	2.2%	103
Parts of Trips Booked Over The Internet	Air tickets	80.9%	9.9%	77.8%	104
	Accommodation	67.2%	46.4%	66.3%	101
	Car rental	29.7%	3.0%	28.5%	104
	Tickets or fees for specific activities or attractions	23.2%	44.8%	24.2%	96
	Tickets for rail, bus or boat / ship fares	16.5%	12.6%	16.3%	101
	A package containing two or more items	14.0%	4.6%	13.6%	103
	Other	4.5%	11.0%	4.8%	94

Media Consumption Habits

Out-of-province travelers are much more likely to use travel media (e.g., travel sections of newspapers, travel websites) than within-province travelers. Out-of-province travelers may also be effectively targeted through cuisine-related media (e.g., food & cooking magazines, cooking shows), sports media, city lifestyle magazines, business, finance and investing magazines and soft rock radio stations. Within-province travelers may be best reached through home-oriented magazines (e.g., home and garden), daytime soap operas and both alternative rock music and country music radio stations.

Fig. 16 Media Consumption Habits

		Took a Pleasure Trip Outside of British Columbia	Only Took Pleasure Trips Within British Columbia	Total Pleasure Travelers in British Columbia	Index
Size of Market		2,334,739	327,682	2,662,421	100
Newspaper Readership	Reads daily newspaper	89.7%	92.0%	90.0%	100
	Reads weekend edition of newspaper	89.5%	90.8%	89.7%	100
	Reads local neighbourhood or community newspapers	73.9%	76.8%	74.3%	100
	Reads other types of newspapers	19.7%	24.9%	20.4%	97
	Frequently or occasionally reads travel section of daily newspaper	52.9%	34.1%	50.6%	105
	Frequently or occasionally reads travel section of weekend newspaper	52.4%	29.5%	49.6%	106
Types of Magazines Read (Top 5 Indexed)	Magazines about your city	16.9%	5.5%	15.5%	109
	Travel (e.g., Condé Nast)	11.7%	4.0%	10.7%	109
	Business, finance and investing	18.3%	6.9%	16.9%	108
	Food and cooking	29.5%	19.4%	28.3%	104
	News magazine	25.2%	20.2%	24.6%	103
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	37.2%	27.0%	35.9%	103
	Biography	40.9%	34.0%	40.1%	102
	Dramas (e.g., Law & Order)	59.8%	52.4%	58.9%	102
	Cooking shows	33.3%	30.4%	33.0%	101
	Late night talk shows	17.7%	17.2%	17.6%	100
Type of Radio Programs Listened To (Top 5 Indexed)	All sports	11.2%	6.2%	10.6%	106
	Soft music / Adult contemporary	30.0%	18.7%	28.6%	105
	Multicultural	8.5%	5.9%	8.2%	104
	News / Talk / Information	43.8%	36.7%	42.9%	102
	Jazz / Big band	8.4%	7.5%	8.3%	101
Types of Websites Visited (Top 5 Indexed)	Sports	28.0%	13.7%	26.5%	106
	Travel	54.8%	28.8%	52.0%	105
	Entertainment	48.6%	31.9%	46.8%	104
	Newspaper sites	27.4%	20.2%	26.6%	103
	Network news sites (e.g., CBC, CNN)	41.6%	33.7%	40.8%	102

**Appendix One:
Canadian TAMS 2006 Culture and Entertainment Segmentation**

Activity Segment	Activities in Segment	
Agro-Tourism	Dining At A Farm	Harvesting and /or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	
National & International Sporting Events	Curling Bonspiel	National /International Sporting Events such as the Olympic Games
	Professional Figure Skating	
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related
Musical Concerts, Festivals & Attractions	Music Festivals	Musical Attractions
	Jazz Concert	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Rock & Roll/Popular Music Concert	Country & Western Music Concert
Comedy Festivals & Clubs	Comedy Festivals	Stand-up Comedy Clubs & Other Variety Shows

Appendix Two: Canadian TAMS 2006 Outdoor Activity Segmentation

Activity Segment	Activities in Segment	
Golfing	Played During a Stay at a Golf Resort with Overnight Stay	Golf Tour Package to Play on Various Courses
	Played an Occasional Game While on a Trip	
Hunting	Hunting for Small Game	Hunting for Birds
	Hunting for Big Game	
Fishing	Fresh-Water Fishing	Salt-Water Fishing
	Ice Fishing	Trophy Fishing
Wildlife Viewing	Viewing Land Based Animals	Bird Watching
	Whale Watching & Other Marine Life	Visited National, Provincial /State Park
	Wildflowers /Flora Viewing	Viewing Northern Lights
Hiking, Climbing & Paddling	Mountain Climbing/Trekking	Fresh Water Kayaking /Canoeing
	Rock Climbing	Ocean Kayaking / Canoeing
	Hiking/Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
		White Water Rafting
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkeling in Sea /Ocean
	Sunbathing, Sitting on a Beach	Scuba Diving in Sea/Ocean
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Freshwater Scuba & Snorkeling	Scuba Diving in Lakes /Rivers	Snorkeling in Lakes /Rivers
Exercising & Jogging	Working Out in Fitness Centre	Jogging or Exercising Outdoors
Cycling	Overnight Touring Trip	Recreational - Same Day Excursion
	Mountain Biking	
Motorcycling	Overnight Touring Trip	Same Day Excursion
Horseback Riding	With an Overnight Stop	Same Day Excursion
Snowmobiling & ATVing	All Terrain Vehicle - Overnight Touring Trip	Snowmobiling As an Overnight Touring Trip
	All Terrain Vehicle - Same Day Excursion	Snowmobiling Day Use on Organized Trail
Downhill Skiing & Snowboarding	Snowboarding	Downhill Skiing
Cross-country Skiing & Snowshoeing	Cross-country Skiing	Cross-country or Back Country as an Overnight Touring Trip
	Snowshoeing	
Wilderness Activities	Wilderness Skills Courses	Dog Sledding
	Ice Climbing	
Skating	Ice Skating	In-Line /Rollerblading
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	
Team Sports	Ice Hockey	Curling
	Football	Basketball
	Baseball or Softball	Soccer
Sports & Games	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	