



RESEARCH SERVICES

Travel Activities and Motivations of American Residents: Group Tourists

A Western Canada Perspective

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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. Introduction

A. Background

This report provides information on the American overnight group tour market for Western Canada. It is a companion piece to a report providing descriptions of this market at the Canada level (*Spotlight on American Group & Learning Tourists: A National Perspective, February, 2007*).

Findings are based on information collected in the 2006 Travel Activity and Motivation Survey (TAMS). Research Resolutions & Consulting Ltd. undertook the overall project on behalf of seven tourism organizations across Canada:

- Alberta Tourism, Parks, Recreation and Culture
- Atlantic Canada Tourism Partnership
- Parks Canada
- Tourism & Culture, Government of Yukon
- Tourism British Columbia
- Travel Manitoba
- Department of Canadian Heritage

These TAMS partners supplied Research Resolutions with the TAMS file specifically for this analysis.

In addition to this regional report, Alberta Tourism, Parks, Recreation and Culture; Tourism British Columbia; and Tourism & Culture, Government of Yukon were provided with customized detailed computer tabulations from the 2006 TAMS US data file (Volume 3).

An analogous report for Atlantic Canada has been supplied to its sponsor, the Atlantic Canada Tourism Partnership (ACTP).

B. Content and Definitions

1. The Western Canada Report

This overview report contains demographic, trip activity, attitudinal and travel planning profiles of American adults who claim to have taken an overnight pleasure trip to Alberta, British Columbia and/or the Yukon in the past two years or so and are **Group Tourists** (have taken an organized overnight group tour in the past two years).²

The original plan for the project was production of information on combined markets for Alberta/B.C. and B.C./Yukon. The dominance of records for American overnight pleasure Group Tourists to **British Columbia**, and the comparative paucity of records for American Group Tourists who had *only* visited Alberta or the Yukon (of the three western jurisdictions) rendered this approach of minimal value. In effect, there were simply not enough exclusive records for these two jurisdictions to influence the patterns or profiles of Group Tourists to British Columbia. As a consequence, the analysis presented herein includes all three jurisdictions in total (**Western Canada**).³

In addition to the western overview, this report provides information about *each* jurisdiction individually so that the impact of the very strong British Columbia market does not mask some very real differences among Group Tourists in British Columbia, Alberta and the Yukon. Thus, tourism planners and marketers in British Columbia, Alberta and the Yukon can examine the profile and characteristics of their *own* Group Tourists.

To render the extensive trip activity information contained in the TAMS survey more useful, Research Resolutions created several tiers or groupings of the many individual activities included in the study's questionnaire. The plan used to combine trip activities is appended to this report.

Note to Readers

Group tour experiences and locations visited in Canada are *independent* of one another.

In other words, the American tourists featured in this analysis claim to have taken organized overnight group tours in the past two years or so but their group tour experiences may or may not have occurred at the Canadian destinations they claim to have visited over the same time period.

² Since fieldwork for the 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.

³ Within the detailed computer tabulations, columns are devoted to a combined *Alberta/B.C.* group tour segment. These figures and those for *Western Canada* as defined herein are at parity for the reasons described above.

2. 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 ⁴	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.

⁴ Formerly *Alberta Economic Development*.

C. Observations & Key Findings

WESTERN CANADA HAS STRONG APPEAL AMONG AMERICAN GROUP TOURISTS.

Western Canada attracts a small fraction of the 166.0 million American overnight pleasure travellers to any destination (4%) but is much more successful in attracting those who take group tours. In fact, the group tour market in the U.S. travels to Western Canada at about 2.5 times the rate as do members of the *typical* U.S. pleasure market. One-in-ten of the 19.9 million Group Tourists living in the U.S. claim to have visited Western Canada for a pleasure trip recently (10% or 2.0 million Americans).

About one-third of Alberta's recent U.S. overnight pleasure travellers (35%) and those who visited British Columbia recently are Group Tourists (32%). The Yukon is especially successful in attracting this market segment: almost three-fifths of the territory's American overnight pleasure tourists have taken a group tour in the past two years or so (56%).

IT IS "WESTERN CANADA" OR "NO CANADA" FOR MANY GROUP TOURISTS.

Western Canada is the *only* region of Canada visited on a recent overnight pleasure trip by most of the region's Group Tourists. Three-fifths of them or 1.2 million have been to one or more destinations in Alberta, British Columbia or the Yukon but to no other *Canadian* destination in the past two years or so.

BRITISH COLUMBIA DOMINATES THE WESTERN CANADA GROUP TOUR MARKET.

This province achieves a substantively larger share of Western Canada's 2.0 million American Group Tourists (84%) than does Alberta (25%) or the Yukon (19%). Possibly because of this level of exposure, British Columbia is also deemed more *appealing* as a travel destination by Western Canada's Group Tourists than is Alberta or the Yukon.

Exclusive visitation to a single Western jurisdiction is comparatively rare for Alberta (21%) and the Yukon (12%), although about half of British Columbia's Group Tourists claim to have been to this province and not to either Alberta or the Yukon recently (48%).

WESTERN CANADA ATTRACTS GROUP TOURISTS FROM ACROSS THE U.S.

Like general tourism flows from the U.S. to Canada, these tourists are concentrated along traditional north/south travel corridors. Thus, Western Canada is especially successful in attracting Group Tourists from the Pacific region, and most notably, California and Washington.

At the same time, *organized group travel* tends to expand the region's reach in the U.S. and diversify the marketplace for Western Canada. Yes, one-third of all Group Tourists who have come to Western Canada in the past two years live in the U.S. Pacific region and two-thirds live in other states. In contrast, a substantively higher proportion of *all* overnight pleasure travellers to Western Canada are residents of California, Oregon or Washington (49%), leaving only half to represent the remaining forty-seven states.

GROUP TOURISTS COME IN ALL AGES AND BOTH GENDERS.

They are, however, older than are typical American tourists to Western Canada. Consistent with their ages, members of the Group Tourist market are predominantly working or retired older couples and older parents.

NOT ALL GROUP TOURISTS ARE OLD RETIREES!

Close to half of them are still actively engaged in the labour market and over one-third hold executive, managerial or professional positions.⁵ They represent the full range of household incomes, but are concentrated at the affluent end of the spectrum. Almost two-fifths are in the \$100,000+ income bracket.

SUN/SEA DESTINATIONS ARE MAJOR COMPETITORS FOR WESTERN CANADA'S GROUP MARKETS.

The primary foreign competition comes from Mexico, the Caribbean and Europe. Additionally, sun/seas states including Florida, California, Nevada and Arizona compete with Western Canada for Group Tourists.

ALASKA IS AN IMPORTANT "HOOK" FOR ATTRACTING U.S. GROUP TOURISTS.

Likely because of cruises up the Inside Passage and tours along the Alaska Highway, half of the group tour market for British Columbia and almost all members of this market for the Yukon claim to have recently visited Alaska on a pleasure trip.

⁵ Male or female head of household reports this occupation category.

MOST GROUP TOURISTS IN WESTERN CANADA ALSO TAKE OCEAN CRUISES.

Ocean cruises, and particularly those to Alaska, are very popular among Western Canada's Group Tourists. High cruise participation rates to Alaska might be expected from Group Tourists to British Columbia and the Yukon. Taking an ocean cruise is also comparatively widespread among Alberta's Group Tourists but Alberta-bound Group Tourists are more inclined to take cruises to the Caribbean and other destinations than to Alaska.

U.S. GROUP TOURISTS IN WESTERN CANADA START PLANNING A TRIP WITH A SAFE DESTINATION IN MIND.

Group Tourists in Western Canada, like their counterparts in other regions and *all* other American tourists in Western Canada, start a trip planning process with *destination* in mind. It should be a *safe* destination that poses *no health concerns* and has *many things for adults to see and do*. The importance of many activities for adults is consistent with the most highly valued benefit of vacationing for Group Tourists: *seeing and doing something new and different*.

ACTIVITY-BASED REASONS FOR TRAVEL DIFFER SOMEWHAT ACROSS THE REGION

Collectively, Western Canada's Group Tourists are most likely to take trips in order to participate in **nature and outdoor activities** (65%), followed at a considerable distance by **culture and learning-oriented activities** (47%) such as museums, art galleries, or performances, hands-on learning experiences and Aboriginal culture, and by **entertainment activities** including casinos (45%). Approximately one-third have recently taken trips for a **wilderness lodge, seaside** or **mountain resort**, or **spa experience** and about one-quarter have been motivated by their **culinary or wine** interests or **sporting events**.

More Group Tourists who go to Alberta and the Yukon are driven by outdoor-oriented interests than are those who go to British Columbia. Those with recent trips in the Yukon also tend to be driven by cultural interests to a greater extent than are their counterparts with trips to Alberta or British Columbia.

VIEWING FLORA AND FAUNA AND GOING TO NATURE PARKS ARE HIGH ON THE TRIP MOTIVATION LIST.

Land-based outdoor activities that drive trip decisions for Group Tourists tend to be passive (e.g., whale watching and land-based animal viewing, or going to a national or provincial nature park). There is, of course, a segment of the Group Tourist market that takes trips in order to alpine ski (13%).

THE INTERNET IS THE MOST PREVASIVE SOURCE OF TRAVEL PLANNING INFORMATION.

Of the many sources of travel information available to consumers, the **internet** is the most widely used. A salient, though anticipated, difference between group tourists and typical American overnight pleasure travellers to Western Canada is the higher level of reliance on **travel agents** by those who make group bookings. Almost three-fifths of these tourists rely on travel agents as a source of information, compared to about two-fifths of typical American overnight pleasure travellers to Western Canada.

THE GROUP TOUR MARKET GENERATES A DIVERSIFIED POOL OF AMBASSADORS FOR WESTERN CANADA.

With *advice from friends and relatives* being one of the highest-ranking sources of travel planning information, the comparatively high level of regional diversity represented by Group Tourists is a promotional bonus for British Columbia, Alberta and the Yukon. These tourists take the good news stories of their trips and experiences home . . . to homes in Florida and New York and many other states that are less commonly represented among typical American pleasure tourists in Western Canada.

II. American Group Tourist & Learning Tourist Markets

This chapter appears in the *National Perspective* report. It is repeated here to provide context for the reader.

A. An Overview of the Market

1. At the Canada Level

U.S. Overnight Pleasure Travellers: Of the 222.8 million American adults who might have taken overnight trips for pleasure or vacation purposes in the past two years or so, 166.0 million, or seventy-five percent, claim to have done so. Almost 21 million Americans chose Canada for an overnight pleasure trip over a two-year period.

The **Group Tourist** market for *any* destination is estimated to be about twenty million American **overnight pleasure travellers** (19.9 million). The subset of this market with expressed interest in *learning* travel represents about nine million American adults (8.9 million). Thus, the **Group Learning Tourist** segment is close to half of the entire Group Tourist market (45%).

There are many more American **Learning Tourists** than Group Learning Tourists. In fact, the Group Learning segment represents only one-fifth of the 47.0 million American overnight pleasure travellers in the more broadly defined *All Learning Tourist* segment.

Cruise/Group Tourists: Because there are areas of commonality between overnight cruise and organized group tour experiences, pleasure travellers who participated in either of these activities were combined to get an estimate of total market size. Almost 2-in-10 overnight pleasure travellers or 39.3 million Americans say that they have taken an overnight **cruise** and/or an overnight **group tour** (different locations and/or single location). These tourists are almost evenly divided between those who took a cruise but did not take a group tour (cruise *only* 19.4 million) and those who took at least one overnight group tour (19.9 million).⁶ Of this Cruise/Group Tour market segment, about 3-in-10 or 11.6 million did *not* take a cruise over the past two years or so.

Key Definitions

Overnight Pleasure Travellers: U.S. adults (18+) who claim to have taken an overnight pleasure/vacation trip in the past two years.

Group Tourists: U.S. adults (18+) who have taken an organized overnight group tour in the past two years or so (any destination).

Group Tourists in Canada/Regions: Group tourists (see above) who have taken an overnight pleasure trip to Canada or the named province, territory or region in the past two years or so.

Group Learning Tourists: Group Tourists who are also Learning Tourists (see below).

All Learning Tourists: Overnight pleasure tourists who claim that *gaining knowledge of history, other cultures or other places or stimulating the mind/ being intellectually challenged* is a "highly important" benefit of pleasure travel. These tourists may or may not be "Group Tourists".

Western Canada: Alberta, British Columbia, and Yukon.

⁶ "Group Tourists" may or may not have taken overnight cruises in the past two years.

	U.S. Overnight Pleasure Travellers To . . .					
	U.S. Adult Population (60,649)		Any Destination (45,697)		Canada (6,771)	
Unweighted base	222.8 million		166.0 million		20.8 million	
Weighted, Projected	222.8 million		166.0 million		20.8 million	
Overnight pleasure traveller to Canada, past 2 years	20.8 million	9%	20.8 million	13%	20.8 million	100%
Group Tourists	20.4 million	9%	19.9 million	12%	5.3 million	26%
Learning	9.1 million	4%	8.9 million	5%	2.7 million	13%
All Learning Tourists	49.7 million	22%	46.9 million	28%	7.8 million	38%
Group/Cruise Tourists	40.2 million	18%	39.3 million	24%	9.4 million	45%
Cruise Only	19.8 million	9%	19.4 million	12%	4.1 million	20%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1, pages 1, 49.

Canada is especially successful in attracting Group Tourists and Group Learning Tourists.

- Of the 166.0 million overnight pleasure travellers, about 1-in-8 claim to have taken a pleasure trip to Canada in the past two years (13%) [See Table 2].
- The proportions of Group Tourists and Group Learning Tourists with recent pleasure trips to Canada are much higher. In fact, more than 1-in-4 American Group Tourists claim to have visited Canada for a pleasure trip recently (27%) and almost 1-in-3 Group Learning Tourists are recent pleasure tourists at Canadian destinations (30%).
- Canada is not as successful in attracting the broader Learning Travel segment. Nonetheless, at 17%, the Learning Travel segment comes to Canada at a somewhat higher rate than Canada's share of the total overnight pleasure travel market (13%) would suggest.

	Any Destination	Canada	Canada's Share
Overnight pleasure travellers	166.0 million	20.8 million	13%
Group Tourists	19.9 million	5.3 million	27%
Group Learning Tourists	8.9 million	2.7 million	30%
All Learning Tourists	46.9 million	7.8 million	17%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 page 49. This table displays horizontal percentages for each row.

Since one of the defining characteristics of **Group Learning Tourists** and **Learning Tourists** in general is their interest in gaining *knowledge of history, other cultures or other places* when travelling, it is not surprising that as a *foreign* destination, Canada is especially successful in attracting members of these segments.

2. At the Regional Level

Canada's regions attract U.S. overnight pleasure travellers in varying numbers, from a high of almost twelve million for Ontario over a two-year time span to a low of approximately one million for Manitoba/Saskatchewan.

Group Tourists are substantively over-represented in each of Canada's regions relative to their proportion of the U.S. travelling public at large (*any destination*).

- Only one-in-eight U.S. overnight pleasure travellers to any destination are Group Tourists whereas two-fifths of those who have taken an overnight pleasure trip to destinations in **Atlantic Canada** (40%) are Group Tourists.
- One-third of overnight pleasure travellers with a recent visit in **Western Canada** (33%), **Manitoba/Saskatchewan** (33%) or **Quebec** (31%) are Group Tourists.
- **Ontario** attracts Group Tourists at a lower rate than any other region (24%). Nonetheless, the sheer size of this province's U.S. tourist base results in Ontario capturing 2.9 million U.S. Group Tourists – more than any other region.

	U.S. Adult Population	U.S. Overnight Pleasure Travellers To . . .						
	Total	Any Destination	Canada	Western Canada	Man/ Sask	Ontario	Quebec	Atlantic Canada
Unweighted base	(60,649)	(45,697)	(6,771)	(1,966)	(354)	(4,179)	(1,096)	(634)
Weighted, Projected	222.8 million	166.0 million	20.8 million	6.2 million	1.0 million	11.9 million	4.1 million	2.6 million
Group Tourists	9%	12%	26%	33%	33%	24%	31%	40%
<i>Number in millions</i>	<i>20.4</i>	<i>19.9</i>	<i>5.3</i>	<i>2.0</i>	<i>0.3</i>	<i>2.9</i>	<i>1.3</i>	<i>1.0</i>
Learning	4%	5%	13%	16%	18%	12%	19%	25%
<i>Number in millions</i>	<i>9.1</i>	<i>8.9</i>	<i>2.7</i>	<i>1.0</i>	<i>0.2</i>	<i>1.4</i>	<i>0.8</i>	<i>0.6</i>
All Learning Tourists	22%	28%	38%	44%	43%	37%	45%	47%
<i>Number in millions</i>	<i>49.7</i>	<i>46.9</i>	<i>7.8</i>	<i>2.7</i>	<i>0.4</i>	<i>4.4</i>	<i>1.8</i>	<i>1.2</i>
Group/Cruise Tourists	18%	24%	45%	56%	49%	39%	51%	71%
Cruise Only	9%	12%	20%	24%	16%	15%	20%	31%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1, page 47.

Group Learning Tourists are also over-represented in Canada's regions. Again, relative to their share of U.S. overnight pleasure travellers in general and those who have recently travelled to Canada, **Atlantic Canada** is most successful in attracting Group Learning Tourists. One-in-four of this region's recent American pleasure tourists are in this market segment. And, again, from a share perspective, Ontario is

least successful in attracting Group Learning Tourists (12%). Other regions fall between Atlantic Canada and Ontario.

Consistent with Canada's success in attracting Learning Tourists as a whole, each region captures U.S. visitors in this segment at a higher rate than would be expected based on the learning segment's share of the total overnight pleasure travel market (28%). Over two-fifths of the inbound pleasure market from the U.S. to Atlantic Canada (47%), Quebec (45%) and Western Canada (44%) are Learning Tourists. Ontario is less successful than other regions in attracting U.S. Learning Tourists (37%).

Table 4 displays the *share* each region represents of U.S. overnight pleasure travellers to **Canada** in each of the key market segments.⁷ When viewed from this perspective, the prominence of Atlantic Canada in the Group Tourist market, and particularly in the Group Learning subset is clearly evident. This region attracts twice as many Group Learning Tourists (24%) as its share of total U.S. overnight pleasure visitation to Canada would suggest (12%).

	Proportion of Total U.S. Overnight Pleasure Travellers To Canada with Destinations in . . .				
	Western Canada	Man/Sask	Ontario	Quebec	Atlantic Canada
Overnight pleasure travellers	30%	5%	57%	20%	12%
Group Tourists	38%	6%	54%	24%	19%
Group Learning Tourists	37%	7%	54%	28%	24%
All Learning Tourists	35%	6%	56%	24%	15%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1, pages 1, 2, 3. Note: row percentages add to more than 100% due to duplication of visitors to various regions.

⁷ Rows add to more than one hundred percent because some Americans travel to more than one of Canada's regions.

3. Touring Segments

Americans with recent Canadian travel experiences who take group tours seem to like having the trip organization done for them, whether for an overnight trip or same-day excursion.⁸ They display a strong preference for *multiple location* tours in which they *stayed for one or more nights at different locations* (76%). By definition, all members of this market segment take *overnight* organized tours but only about 3-in-10 go on self-directed overnight touring trips. Same-day excursions for these Group Tourists also tend to be “organized” (51%) rather than self-directed (39%).

Members of the learning subset of Group Tourists display a particularly strong propensity to take *multiple location* tours (82%). They are also somewhat more inclined to take self-directed overnight tours (37%) and same-day excursions (46%) than is the Group Tourist segment as a whole.

Over half of All Learning Tourists claim to have taken an overnight organized tour in the past two years or so, with slightly more of these Americans opting for a *multiple location* tour (28%) than for one with a *single location* (19%). These more generic learning tourists are equally likely to take an organized or self-directed same-day tour (39% each).

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada		Group Tourists	Group Learning Tourists	All Learning Tourists
	Any Location	Any			
Unweighted base	(45,697)	(6,771)	(1,530)	(742)	(2,454)
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Overnight Touring (NET)	20%	39%	100%	100%	51%
Organized Tour	12%	26%	100%	100%	55%
Multiple Location	8%	19%	76%	82%	28%
Single Location	7%	14%	55%	56%	19%
Self-Directed Touring	11%	20%	30%	37%	29%
Same-Day Touring (NET)	30%	47%	62%	65%	55%
Organized Excursion	19%	32%	51%	55%	39%
Self-Directed Touring	20%	31%	39%	46%	39%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1, page 12.

⁸ Same-day excursions on overnight trips.

III. Group Tourists in Western Canada

A. A Market Overview

Western Canada attracts about 1-in-25 of the 166.0 million Americans who take overnight pleasure trips. These 6.2 million Americans represent almost one-third of *all* American pleasure travellers who have come to Canada over a two-year period (30%). The region is significantly more successful in attracting **Group Tourists** than it is in drawing the *typical* U.S. pleasure traveller.

Of the 19.9 million overnight pleasure travellers to any destination in the Group Tourist segment, Western Canada attracts 1-in-10, or 2.0 million tourists over a two-year period. When only the portion of the Group Tourist market that has recently visited Canada is taken into account, the West's prominence as a key Group Tourist destination is also clearly evident. The region's 2.0 million Group Tourists represent almost two-fifths of *all* Group Tourists with recent Canadian travel experiences (38%).

TABLE 6: MARKET SHARE – ALL U.S. PLEASURE TRAVELLERS – PAST 2 YEARS

	American Overnight Pleasure Travellers			
	All		Group Tourists	
	Any Destination	Canada	Any Destination	Canada
Unweighted base	(45,697)	(6,771)	(5,284)	(1,530)
Weighted, Projected	166.0 million	20.8 million	19.9 million	5.3 million
Western Canada	4%	30%	10%	38%
<i>Number</i>	6,174,000	6,174,000	2,012,000	2,012,000
Alberta	1%	7%	3%	10%
<i>Number</i>	1,459,000	1,459,000	506,000	506,000
British Columbia	3%	26%	9%	32%
<i>Number</i>	5,340,000	5,340,000	1,694,000	1,694,000
Yukon	*	2%	3%	7%
<i>Number</i>	674,000	674,000	375,000	375,000

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1, page 47-3/6. *Less than 0.5%.

Each jurisdiction within Western Canada attracts Group Tourists from the entire U.S. overnight pleasure traveller market and the portion with recent Canadian experience at *higher* rates than its share of *typical* tourists would suggest. For example, 1-in-33 typical American tourists to any destination have been to British Columbia recently but about 1-in-10 of the corresponding Group Tourists are recent B.C. visitors. While at lower orders of magnitude than the regional market leader, Alberta and the Yukon are also about three times as likely to attract Group Tourists as they are to attract typical U.S. overnight pleasure tourists.

At the sub-regional level, about one-third of Alberta's recent U.S. overnight pleasure travellers (35%) and those who visited British Columbia over the past two years are Group Tourists (32%). The Yukon is especially successful in attracting this market segment: almost three-fifths of the territory's recent overnight pleasure tourists have recently taken a group tour (56%).

Group Learning Tourists are also more prevalent among Americans who have visited the Yukon on recent pleasure trips (31%) than they are among recent American visitors to Alberta (19%) or British Columbia (16%).

	American Overnight Pleasure Travellers to Destinations in . . .			
	Western Canada	Alberta	British Columbia	Yukon
Unweighted base	(1,966)	(480)	(1,706)	(205)
Weighted, Projected	6.2 million	1.5 million	5.3 million	674,000
Group Tourists	33%	35%	32%	56%
Learning	16%	19%	16%	31%
All Learning Tourists	44%	50%	45%	51%
Type of Group Tour				
Different Destinations	26%	28%	32%	47%
Single Destination	17%	18%	26%	31%
Group/Cruise Tourists	56%	52%	57%	80%
Cruise Only	24%	17%	25%	37%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, pages 1, 12. *Caution: small base size.

Group Tourists in Western Canada and each of the individual jurisdictions are divided with respect to their preference for *single* versus *multiple destination* group tours. On balance, however, they favour spending nights in more than one location during a group travel experience.

When U.S. overnight cruise passengers are added to the organized Group Tourist market, the numbers swell in Western Canada. This larger market for what are essentially "group" experiences on land or on sea represents over half of all U.S. overnight pleasure tourists in Western Canada over a two-year period (56%). About half of this amalgamated market *only* take cruises (i.e., do not take overnight organized group tours). Not surprisingly in light of current product offerings, the cruise market is especially important to the Yukon.

B. Cross-Visitation in Western Canada

The TAMS study captures overnight pleasure destination information over a two-year period. As such, travellers can have visited many different destinations on the same or different trips. Based on the findings, there is considerable overlap among Group Tourists' destinations in Western Canada but it is impossible to know whether the overlap represents visits to multiple locations on the same trip or separate trips.

British Columbia attracts many more Group Tourists than does Alberta or the Yukon. In fact, over four-fifths of the 2.0 million U.S. Group Tourists with recent pleasure trips in Western Canada claim to have visited this province over a two-year period. Alberta attracted about one-quarter of the region's Group Tourists and the Yukon attracted about one-fifth.

Either they *go west* or they do not come to Canada. Three-fifths of Western Canada's Group Tourists say they have been to destinations in Western Canada but no other Canadian destination (59%). In other words, most have not been to Manitoba, Saskatchewan, Ontario, Quebec or the Atlantic Region in the past two years or so. Exclusive visitation to a single Western jurisdiction is comparatively rare for Alberta (21%) and the Yukon (12%), although about half of British Columbia's Group Tourists claim to have been to this province and not to either Alberta or the Yukon (48%).

	American Overnight Pleasure Travellers to Destinations in Western Canada				
	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Recent Overnight Pleasure Trips to . . .					
Alberta	24%	25%	100%	18%	19%
No other Western Destination	7%	5%	21%	-	-
British Columbia	87%	84%	60%	100%	66%
No other Western Destination	54%	41%	-	48%	-
Yukon	11%	19%	14%	15%	100%
No other Western Destination	1%	13%	**	**	12%
Western Canada and no other Canadian Destination	72%	59%	44%	61%	42%
Alberta AND B.C.	13%	15%	60%	18%	15%
Alberta AND B.C. AND Yukon	2%	3%	11%	3%	15%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, page 47-3/6. *Caution: small base size. **Less than 0.5%.

About one-seventh of the West's Group Tourists have been to both Alberta and British Columbia (15%) and a much smaller number claim to have been to all three western jurisdictions over the past two years or so (3%).

C. Demographic Profiles

1. Place of Residence

Western Canada attracts Group Tourists from across the U.S. Like general tourism flows from the U.S. to Canada, these tourists are concentrated along traditional north/south travel corridors. Thus, Western Canada is especially successful in attracting Group Tourists from the Pacific region, and most notably, California and Washington.

In contrast to the region's success in the Pacific states, Western Canada is not as successful as other regions or Canada as a whole, in attracting Group Tourists from the heavily populated Mid-Atlantic and East North Central regions of the U.S.

From a sub-regional perspective, different parts of Western Canada have somewhat different strengths and weaknesses on a state-by-state basis.

- California is the preeminent source of Group Tourists for British Columbia, representing 1-in-4 of this province's U.S. Group Tourists.
- The state is also an important feeder market for Alberta and the Yukon (17% each).
- The Yukon seems particularly attractive as a destination for residents of the South Atlantic states, and especially Florida. Almost one-third of the Yukon's Group Tourists live in this southern U.S. region, with about one-seventh residing in Florida. The popularity of an RV trip along the Alaska highway by Americans who have retired to Florida may explain the strong showing for the Yukon among residents of this very distant state.
- Although base sizes are relatively small, there are indications to suggest that Group Tourists from Illinois may have a special interest in Alberta, relative to British Columbia or the Yukon.

TABLE 9: American Overnight Pleasure Travellers to Destinations in Western Canada
PLACE OF RESIDENCE

PLACE OF RESIDENCE	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
		(1,966)	(541)	(141)	(464)
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
US Regions					
New England	3%	4%	4%	4%	7%
Massachusetts	1%	1%	2%	1%	2%
Middle Atlantic	6%	10%	10%	9%	8%
New York	3%	5%	5%	5%	4%
East North Central	9%	10%	15%	10%	7%
Michigan	2%	2%	3%	2%	1%
Illinois	3%	3%	6%	3%	**
West North Central	6%	7%	6%	7%	11%
South Atlantic	12%	18%	16%	17%	29%
Florida	6%	8%	7%	6%	14%
East South Central	2%	3%	4%	2%	3%
West South Central	6%	8%	11%	8%	7%
Texas	5%	6%	7%	6%	7%
Mountain	8%	6%	9%	6%	4%
Pacific	46%	33%	25%	37%	24%
California	23%	22%	17%	24%	17%
Washington	18%	9%	6%	10%	3%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, page 42. *Caution: small base size. **Less than 0.5%.

2. Personal and Household Characteristics

Age & Gender

While every age group is represented among Group Tourists in Western Canada, these tourists tend to be older than the typical American tourist to the region. Three-fifths of them are 55 years of age or more. Within the region as a whole, these tourists are equally divided between women (49%) and men (51%).

The Yukon's Group Tourist tends to be older than those who visit Alberta or British Columbia. In fact, half of the Yukon's market for this niche market is at least 65 years of age. While gender is evenly split among Group Tourists in British Columbia, those who go to Alberta are somewhat more likely to be women whereas those who visit the Yukon are slightly more likely to be men.

In fact, women who are 55 years of age or older represent about one-third of the Group Tourist market for Western Canada as a whole and those with recent trips in Alberta and British Columbia. The proportion of older women increases to over two-fifths among American overnight pleasure visitors to the Yukon.

	American Overnight Pleasure Travellers to Destinations in Western Canada				
	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Age					
18 – 34 Years	21%	13%	13%	12%	8%
35 – 44 Years	14%	9%	3%	11%	3%
45 – 54 Years	21%	19%	17%	18%	15%
55 – 64 Years	21%	23%	29%	23%	24%
65+ Years	23%	36%	39%	37%	51%
Gender					
Men	53%	51%	44%	51%	54%
55+ Years	22%	27%	31%	27%	31%
Women	47%	49%	56%	49%	46%
55+ Years	22%	32%	36%	33%	43%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, page 38. *Caution: small base size.

Race, Education, Occupation, and Income

Almost all American overnight pleasure travellers to Western Canada and those in the Group Tour segment are white. Over half of the U.S. Group Tourists in the region are university educated, on par with all overnight pleasure visitors to Western Canada. Because they are somewhat older than the U.S. pleasure market as a whole, American Group Tourists in Western Canada are less apt to be in the labour force and more apt to be retirees. Nonetheless, about half of the Group Tourists for this region are still working full or part time.

TABLE 11: RACE, EDUCATION, OCCUPATION, INCOME | American Overnight Pleasure Travellers to Destinations in Western Canada

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Race					
White	86%	88%	88%	90%	83%
African American	2%	3%	5%	2%	2%
Asian American	4%	4%	2%	4%	3%
Education					
High school diploma or less	9%	11%	18%	10%	11%
Some post-secondary	23%	22%	21%	22%	36%
Post-secondary diploma or certificate	9%	8%	8%	8%	6%
University degree+	56%	57%	49%	59%	41%
Labour Force Participant¹					
Retirees	25%	38%	44%	40%	49%
Executive/Manager /Professional²					
	32%	33%	24%	32%	38%
Household Income³					
Under \$40,000	14%	11%	14%	11%	16%
\$40,000 - \$59,999	16%	17%	18%	16%	18%
\$60,000 - \$99,999	31%	35%	37%	35%	28%
\$100,000 - \$149,999	22%	20%	15%	22%	21%
\$100,000+	39%	38%	31%	37%	38%
\$150,000+	17%	17%	16%	16%	17%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3 pages 34, 35,36, 37. ¹ Labour force participant¹ includes working full time, part time and self-employed. ² Male or female head of household. ³ Note: 2005 household incomes have been re-percentage on total stating an income (US\$). *Caution: small base size. **Less than 0.5%.

Like all U.S. overnight pleasure visitors to Western Canada, Group Tourists span the income spectrum. Over one-quarter claim household incomes under \$60,000, about one-third are in the \$60,000 to under \$100,000 bracket, and a slightly higher proportion are in the more affluent \$100,000+ bracket.

3. Lifestage

Consistent with their ages, members of the Group Tourist market are predominantly older parents and working or retired older couples. The latter group – retired older couples – is more characteristic of Group Tourists (25%) than of the typical American overnight pleasure traveller to Western Canada (15%).

TABLE 12: HOUSEHOLD CHARACTERISTICS | American Overnight Pleasure Travellers to Destinations in Western Canada

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
HOUSEHOLD SIZE					
1 person	14%	16%	19%	17%	16%
2 people	46%	53%	53%	54%	53%
3 person	15%	13%	8%	14%	9%
4 people	14%	9%	8%	8%	9%
5+ people	10%	8%	12%	6%	10%
Average (all ages)	2.6	2.4	2.4	2.3	2.5
LIFESTAGE¹					
Young singles	3%	1%	1%	1%	**
Middle singles	7%	8%	11%	8%	7%
Older singles	4%	7%	7%	8%	9%
Young couple	12%	11%	7%	11%	1%
Working older couple	18%	20%	16%	19%	28%
Retired older couple	15%	25%	30%	26%	25%
Young parent	6%	2%	**	2%	**
Middle parent	5%	3%	2%	3%	1%
Older parent	24%	21%	25%	18%	27%
Any singles	14%	16%	19%	17%	16%
Any couples	45%	55%	53%	56%	54%
Any parents	36%	26%	27%	23%	28%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3 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. *Caution: small base size. **Less than 0.5%.

IV. Competitive Destinations

A. Worldwide Destinations for Overnight Pleasure Trips

U.S. travellers were asked to identify the destinations of overnight pleasure trips they took over a two-year period. Virtually all of those with recent destinations in Western Canada have *also* taken vacations within the U.S.A. and about one-half have gone to foreign countries apart from Canada over the past two years or so.

Travel outside Canada and the U.S.A. is appreciably more prevalent among Group Tourists than it is within the general market for Western Canada. Mexico, the Caribbean and Europe are the most popular competitive destinations for Western Canada's Group Tourists – about one-third of these vacationers claim to have been to destinations in each of these regions over the past two years.

The Yukon's group tour market seems to have a special interest in South and Central America – a finding that may be associated with the prominence of Americans in the territory's Group Tour market who live in relatively close proximity to this region (residents of Florida and other South Atlantic U.S. states).

TABLE 13: COMPETITIVE DESTINATIONS WORLDWIDE*	American Overnight Pleasure Travellers to Destinations in Western Canada				
	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	Columbia	British Yukon**
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Canada	100%	100%	100%	100%	100%
USA	99%	99%	98%	99%	100%
Other Countries (NET)	51%	67%	65%	70%	65%
Mexico	26%	36%	28%	38%	33%
South/Central America	9%	16%	16%	16%	26%
Caribbean	23%	34%	28%	36%	41%
Europe	20%	32%	36%	32%	35%
Australia/New Zealand	4%	6%	8%	5%	13%
Asia	7%	11%	8%	12%	16%
Africa	2%	5%	6%	4%	13%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, page 47. *Locations visited on overnight pleasure trip, past two years.
**Caution: small base size.

B. Canadian Destinations

Generally, American Group Tourists in Western Canada have experience with many more Canadian destinations than does the typical overnight pleasure visitor to the region. One-quarter have taken recent overnight pleasure trips to Ontario, one-seventh have been to an Atlantic Canada province and the same proportion claim to have vacationed in Quebec in the past two years or so.

As noted previously, while these Americans have considerable experience with a variety of Canadian destinations, the majority of them have *not* travelled outside the Western region on an overnight pleasure trip recently (59%). Of the three western jurisdictions, British Columbia's Group Tourist market is most apt to restrict its Canadian travel to destinations in the west (61%).

In light of British Columbia's ability to attract "exclusive" tourists, it is not surprising that most other regions of Canada including Ontario and neighbouring Prairie provinces are more popular destinations for Alberta's and the Yukon's Group Tourists than for those who have recently travelled in British Columbia. The Northwest Territories might be a logical "group tour" partner for the Yukon based on the high level of visitation to this region among the Yukon's Group Tourists (29%).

TABLE 14: CANADIAN DESTINATIONS ** | **American Overnight Pleasure Travellers to Destinations in Western Canada**

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
No Canadian Locations Outside Western Canada	72%	59%	44%	61%	42%
Atlantic Canada	8%	16%	25%	15%	27%
Newfoundland/Labrador	3%	5%	10%	4%	17%
PEI	5%	11%	16%	11%	17%
New Brunswick	5%	10%	17%	9%	22%
Nova Scotia	6%	12%	23%	12%	21%
Quebec	9%	16%	19%	16%	27%
Ontario	17%	25%	36%	26%	32%
Man/Sask	8%	13%	38%	10%	21%
Manitoba	5%	8%	26%	7%	16%
Saskatchewan	7%	12%	37%	10%	17%
Western Canada	100%	100%	100%	100%	100%
Alberta	24%	25%	100%	18%	19%
British Columbia	87%	84%	60%	100%	66%
Yukon	11%	19%	14%	15%	100%
Northwest Territories	4%	7%	7%	7%	29%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, page 47. * Caution: small base size. **Locations visited on overnight pleasure trip, past two years. Nunavut is not shown because of very small numbers.

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 Americans who have taken overnight pleasure trips to Western Canada recently and the subset of these who are Group Tourists. Information on visitation by Americans to *all* states, including their “home state” can be found in the detailed tabulations.⁹

Between the exotic lure of Alaska and sun/seas states including Florida, California, Nevada and Arizona, destinations in Western Canada have important potential partners, as in the case of Alaska, or face very stiff U.S. domestic competition for their U.S. Group Tourists!

Likely because of cruises up the Inside Passage and tours along the Alaska Highway, half of the group tour market for British Columbia (48%) and almost all members of this market for the Yukon (82%) claim to have recently visited Alaska on a pleasure trip.

Most of Western Canada’s Group Tourists claim to have taken an out-of-state overnight pleasure trip to a sun/sea state over the past two years or so. Florida is the most popular, attracting a higher proportion of Western Canada’s Group Tourists (35%) than it captures within the total U.S. overnight pleasure travel market to the western region (26%).

The share of market for most other U.S. states among Group Tourists is very similar to the U.S. overnight pleasure travel market to Western Canada as a whole. There is, however, an indication that Group Tourists to Alberta have a comparatively strong penchant for visiting Colorado – possibly to ski.

⁹ See Volume 1, Table 47.

TABLE 15: OUT-OF-STATE U.S. DESTINATIONS (Excluding "Own State")** | **American Overnight Pleasure Travellers to Destinations in Western Canada**

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western	British		
		Canada	Alberta	Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Sun/Sea States (S)	75%	82%	81%	85%	79%
<i>In rank order by Group Tourists to Western Canada</i>					
Alaska	30%	47%	31%	48%	82%
Florida (S)	26%	35%	37%	35%	36%
California (S)	31%	32%	29%	34%	35%
Nevada (S)	28%	30%	26%	31%	26%
Arizona (S)	23%	27%	32%	26%	34%
New York State	19%	23%	17%	23%	32%
Hawaii (S)	18%	22%	18%	24%	21%
Washington State	27%	21%	22%	23%	28%
Colorado	19%	20%	30%	19%	21%
Oregon	24%	20%	20%	23%	23%
Washington DC	14%	19%	19%	18%	30%
Georgia	10%	17%	20%	14%	28%
Pennsylvania	12%	17%	15%	17%	28%
Massachusetts	11%	16%	10%	16%	18%
Texas (S)	13%	16%	19%	16%	14%
Illinois	13%	15%	14%	15%	15%
Maryland	9%	13%	7%	13%	21%
Virginia	9%	13%	11%	13%	19%
New Mexico (S)	11%	13%	23%	12%	24%
South Carolina (S)	8%	11%	11%	11%	19%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, page 48. * Caution: small base size. *Out-of-state locations visited on overnight pleasure trip, past two years.

D. Destinations: Role & Ratings

1. Importance of Destination

As they say in retail, destination, destination, destination! For most U.S. overnight pleasure tourists to Western Canada and those in the Group Tourist segment, the first consideration in planning their most recent summer and/or winter trip was **destination**. American Group Tourists to Western Canada also put a premium on destination choice *per se*, with at least 3-in-4 claiming that it is *extremely* or *very important* to them.

It is worth noting that even though they have booked *overnight tours* in the past two years or so, Group Tourists are no more or less likely than the typical visitor to Western Canada to start their trip planning process with a *vacation experience* in mind.

	American Overnight Pleasure Travellers to Destinations in Western Canada				
	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
First Consideration for Most Recent Summer/Winter Trip (NET)**					
Start with destination	70%	69%	58%	74%	63%
Start with activities	16%	14%	12%	14%	13%
Start with type of vacation experience	20%	19%	19%	17%	19%
Look for package deal	3%	5%	7%	4%	6%
Importance of Destination					
Extremely/Very Important	72%	77%	77%	77%	82%
Extremely important	31%	33%	31%	31%	44%
Very important	42%	45%	46%	46%	37%
Average***	4.0	4.1	4.1	4.0	4.2

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3 pages 22, 24. * Caution: small base size. **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.

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.¹⁰

Group Tourists in Western Canada are very similar to American overnight pleasure travellers in the region in terms of the conditions they accord *high importance*. Like other American tourists, group tourists put *feeling safe* at the top of their list. Canada, with its image of being a safe destination, should benefit from the high priority given this condition.

About half of Group Tourists also want a destination with **many things for adults to see and do**. The priority associated with *adult* activities and the corresponding disinterest in activities for *children* reflect the fact that many members of these niche markets live in adult-only households and, more likely than not, are travelling in adult-only parties.¹¹ Consistent with their interest in *feeling safe*, it is not surprising that Group Tourists, like *all* U.S. tourists to Western Canada, want to travel in environments that pose *no health concerns*.

Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 Western Canada Group Tourists¹²

	All Western Canada U.S. Pleasure Tourists	Group Tourists
Feeling safe	68%	68%
Lots for adults to see/do	51%	55%
No health concerns	40%	42%
Mid-range accommodation	36%	41%
Direct access by air	34%	36%
Convenient access by car	37%	35%

Availability of **mid-range lodging, direct air access** and convenient **access by car** are also important considerations in a destination choice for about one-third of Western Canada’s group market. Provision of direct air access for Group Tourists may pose challenges for more remote areas in Alberta, British Columbia and the Yukon, particularly since the restructuring of airline service in Canada.

¹⁰ “Highly important”, “Somewhat important”, and “Of no importance”.

¹¹ Fewer than 1-in-10 Western Canada Group Tourists identify activities for children as *highly important* in a destination choice.

¹² See Table 17 for full array of considerations deemed “highly important” and “of no importance”.

Other considerations attracting high importance scores among about 1-in-4 Western Canada Group Tourists are the availability of **low cost packages**, information available on the **internet** and **budget lodging**. Ratings by these group tourists closely resemble those offered by the entire U.S. overnight pleasure market to Western Canada (see Table 16 on the following page for figures).

There are very few differences in priorities among Group Tourists to the various jurisdictions in Western Canada. Noteworthy, however are the following:

- More Yukon tourists place a priority on **shopping** than do those who have recently been to Alberta or British Columbia.
- Americans who have travelled in British Columbia are least likely to emphasize **convenient access by car or bus/train** when making a destination choice.

TABLE 17: CONDITIONS FOR SELECTING A DESTINATION | American Overnight Pleasure Travellers to Destinations in Western Canada

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
<i>Bold rows are proportion stating "Highly Important"</i>					
No health concerns	40%	42%	36%	40%	50%
Of no importance	14%	12%	17%	12%	12%
Feeling safe	68%	68%	67%	66%	72%
Of no importance	2%	2%	2%	2%	1%
Familiar with culture & language	13%	12%	16%	11%	13%
Of no importance	24%	26%	24%	27%	32%
Very different culture than own	11%	15%	15%	17%	14%
Of no importance	34%	32%	33%	31%	25%
Have friends or relatives there	7%	7%	11%	6%	3%
Of no importance	64%	72%	62%	71%	76%
Low cost packages available	23%	24%	25%	22%	27%
Of no importance	26%	25%	25%	26%	25%
Disabled-person-friendly	8%	8%	11%	8%	5%
Of no importance	77%	72%	74%	72%	70%
Lots for children to see/do	11%	8%	5%	7%	10%
Of no importance	70%	78%	84%	78%	82%
Lots for adults to see/do	51%	55%	64%	51%	58%
Of no importance	4%	4%	2%	4%	5%
Information available on internet	28%	23%	24%	22%	16%
Of no importance	23%	28%	34%	27%	37%
Great shopping	12%	12%	10%	11%	22%
Of no importance	43%	41%	40%	43%	41%
Luxury accommodation	9%	11%	11%	10%	12%
Of no importance	47%	42%	45%	44%	36%
Mid-range accommodation	36%	41%	41%	41%	39%
Of no importance	9%	5%	3%	6%	3%
Budget accommodation	22%	18%	17%	18%	18%
Of no importance	26%	29%	26%	31%	21%
Camping	9%	6%	11%	7%	7%
Of no importance	63%	69%	64%	69%	65%
Convenient access by car	37%	35%	46%	32%	46%
Of no importance	11%	13%	7%	14%	8%
Direct access by air	34%	36%	39%	36%	38%
Of no importance	14%	12%	13%	12%	12%
Convenient access by train/bus	10%	14%	18%	12%	23%
Of no importance	45%	38%	42%	38%	33%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3 pages 25. * Caution: small base size. **Bold rows** are proportion stating "Highly Important".

3. Appeal of Various Destinations

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.¹³ 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.

American Group Tourists in Western Canada are equally enthusiastic about Hawaii and British Columbia, rating these destinations on par for their overall appeal for pleasure travel. Among *all* Western Canada Group Tourists, Alberta (7.1) and Yukon (6.8) are rated appreciably lower than is British Columbia (8.4). In large part, British Columbia fares so well among *all* Western Canada Group Tourists because so many of these tourists have taken recent pleasure trips in this province: 6-in-10 of Alberta's and Yukon's Group Tourists have *also* recently visited British Columbia.

The impact of direct experience with a destination seems to play a role in consumers' appraisals. For example, among Group Tourists who have had recent travel experience in Alberta, the province's overall appeal rating increases dramatically (8.3), to one on par with British Columbia and Hawaii. Similarly, those who have recently been to the Yukon accord the territory a high appeal score (8.3).

Summary: Five Highest Appeal Destinations among Group Tourists in Western Canada¹⁴

	Western Canada U.S. Pleasure Tourists				
	Total	Group Tourists			
		Total	To Alberta	To B.C.	To Yukon
1. Hawaii	8.5	8.5	8.4	8.6	8.3
2. British Columbia	8.6	8.4	8.4	8.5	8.3
3. California	7.7	7.8	7.5	8.0	7.7
4. Colorado	7.5	7.6	8.0	7.6	7.9
5. Florida	6.9	7.2	7.1	7.2	7.4
8. Alberta	6.9	7.1	8.3	6.9	7.2
13. Yukon	6.4	6.8	6.5	6.7	8.3

¹³ The second question associated with reasons to travel to a destination is discussed in the following chapter.

¹⁴ See Table 18 for full array of average ratings and proportion unable/unwilling to rate each destination.

TABLE 18: APPEAL OF VARIOUS DESTINATIONS

American Overnight Pleasure Travellers to Destinations in Western Canada

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
<i>Bold rows are average ratings**</i>					
Newfoundland & Labrador	6.1	6.3	6.7	6.1	6.7
No rating provided	30%	25%	20%	26%	17%
Nova Scotia	6.8	7.0	7.3	7.0	7.6
No rating provided	24%	18%	12%	18%	16%
New Brunswick	6.2	6.4	6.8	6.4	6.5
No rating provided	31%	24%	23%	23%	21%
Prince Edward Island	6.9	7.1	7.1	7.1	7.3
No rating provided	26%	22%	22%	22%	21%
Quebec	6.8	7.0	6.8	7.0	7.4
No rating provided	18%	14%	11%	15%	10%
Ontario	6.8	7.1	7.1	7.1	7.2
No rating provided	19%	15%	12%	15%	11%
Manitoba	5.6	6.0	6.6	5.9	6.5
No rating provided	30%	28%	21%	29%	15%
Saskatchewan	5.7	6.0	6.7	5.9	6.5
No rating provided	29%	26%	19%	28%	11%
Alberta	6.9	7.1	8.3	6.9	7.7
No rating provided	20%	18%	3%	20%	11%
British Columbia	8.6	8.4	8.4	8.5	8.3
No rating provided	4%	6%	12%	3%	7%
Yukon	6.4	6.8	6.5	6.7	8.3
No rating provided	24%	21%	25%	22%	1%
Northwest Territories	6.2	6.5	6.2	6.4	7.7
No rating provided	26%	26%	28%	27%	9%
New York State	7.0	7.0	6.9	7.0	6.5
No rating provided	8%	8%	8%	8%	7%
Colorado	7.5	7.6	8.0	7.6	7.9
No rating provided	8%	7%	7%	7%	3%
Florida	6.9	7.2	7.1	7.2	7.4
No rating provided	6%	5%	5%	5%	2%
California	7.7	7.8	7.5	8.0	7.7
No rating provided	3%	3%	3%	3%	***
Hawaii	8.5	8.5	8.4	8.6	8.3
No rating provided	5%	5%	6%	5%	2%
Arizona	7.0	7.1	7.7	7.1	7.2
No rating provided	6%	4%	4%	4%	***

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3 pages 26. * Caution: small base size. **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. ***Less than 0.5%.

4. Number of Good Reasons to Visit Various Destinations

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*.

Not too surprisingly, the *same* destinations accorded high *appeal* ratings are also the ones that emerge at the top of Western Canada's Group Tourists' lists for having *many good reasons* to visit on a pleasure trip. Specifically, Hawaii tops the list with about 3-in-4 Western Canada Group Tourists stating that there are many good reasons to go to this tropical destination. British Columbia is also highly regarded. On par with California, three-fifths of these consumers believe there are *many good reasons* to go to British Columbia.

About one-half of the region's Group Tourists believe there are many good reasons to visit Colorado and/or Florida and slightly fewer make this claim with respect to New York. Alberta and the Yukon are not deemed to have *many good reasons* to visit by the majority of Western Canada's U.S. Group Tourists.

Summary: Destinations With At Least One-Half Saying *Many Good Reasons* to Visit (in rank order within each category)¹⁵

Western Canada U.S. Pleasure Tourists

<u>Total</u>	<u>Group Tourists</u>			
	<u>Total</u>	<u>To Alberta</u>	<u>To B.C.</u>	<u>To Yukon</u>
Hawaii	Hawaii	Hawaii	Hawaii	Hawaii
B.C. (69%)	B.C. (62%)	B.C. (59%)	B.C. (65%)	Colorado
California	California	Colorado	California	B.C. (57%)
		Alberta (55%)		Yukon (56%)
		California		California

Again, analogous to the appeal ratings described in the previous section, recent exposure to a destination may have an impact on Group Tourists' perceptions. For example, over half of the Group Tourists who have recently visited Alberta believe there are many good reasons to visit this province but only about 3-in-10 Group Tourists in total make this claim (29%). Similarly, the Yukon is much more highly rated by those who have recently been to the region (56%) than by Western Canada's group market as a whole (27%).

¹⁵ See Table 19 for the full array of ratings.

**TABLE 19: NUMBER OF REASONS TO VISIT
VARIOUS DESTINATIONS** | **American Overnight Pleasure Travellers to Destinations in
Western Canada**

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
		Unweighted base	(1,966)	(541)	(141)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
<i>% stating "MANY" good reasons to visit</i>					
Newfoundland & Labrador	16%	17%	21%	16%	19%
Nova Scotia	25%	30%	37%	29%	39%
New Brunswick	17%	21%	28%	21%	27%
Prince Edward Island	25%	30%	34%	30%	35%
Quebec	32%	33%	30%	35%	37%
Ontario	28%	31%	31%	32%	44%
Manitoba	9%	12%	18%	10%	25%
Saskatchewan	11%	13%	20%	10%	24%
Alberta	29%	29%	55%	26%	35%
British Columbia	69%	62%	59%	65%	57%
Yukon	23%	27%	28%	26%	56%
Northwest Territories	20%	22%	22%	21%	42%
New York State	46%	44%	40%	45%	35%
Colorado	47%	49%	57%	48%	58%
Florida	45%	48%	41%	48%	48%
California	62%	60%	53%	63%	55%
Hawaii	72%	74%	68%	74%	68%
Arizona	35%	36%	45%	35%	34%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3 pages 27. * Caution: small base size. Proportions are those stating MANY good reasons to visit.

V. Activities That Motivate 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*.¹⁶

Not Necessarily in Canada

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 to a Western Canadian destination in the past two years, the activities that motivated their recent overnight trips (any purpose) are **not** linked to British Columbia, Alberta or the Yukon. Thus, a trip prompted by interest in alpine skiing could have been to Whistler, Banff, Vail or the Swiss Alps. Similarly, the park for a camping experience could have been Waterton Lakes, Banff, Death Valley, Grand Canyon, or any other park in the world; a winery could have been in the Okanagan Valley, Napa, Niagara or Bordeaux.

New Categories for Analysis

The survey form presents activities in sections with general headings. New aggregates have been developed for this analysis. These new groups represent an attempt to create meaningful units of information for product development and marketing purposes. For example, a "Cultural/Learning Activities & Events" category has been created that includes activities such as *international film festivals* and *literary festivals or events*. It was felt that these activities were more closely aligned with *live theatre*, and *classical concerts* than with carnivals and comedy festivals. These latter festivals are included in a fairs/festivals sub-group nested within the broader "Theme/Amusement Parks/ Other Entertainment/Events" group.

¹⁶ Presumably, "these trips" are those on which the specific activity took place.

The major categories used in this report are listed below.¹⁷ A list of intermediate and sub-group activities within each category is appended.

- Participatory Outdoor Activities
- Cultural/Learning Activities & Events
- Theme/Amusement Parks/Other Entertainment/ Events
- Food & Wine
- Cultural/Learning Activities & Events
- Lodging
- Shopping
- Spectator Sports
- Team Sports, Tournaments, Games

Focus on “Main Activity”

For packaging and promotional purposes, tourism planners and marketers need to be able to identify *activity themes* that motivate an overnight pleasure traveller to select one type of group tour or learning travel experience over another. For this reason, the information presented here identifies the relative popularity of activities or activity groups as *trip motivators*. In other words, only information on activities that were the “main reason” a trip was taken is presented here. Information about “any” participation in the full range of activities covered in the TAMS questionnaire is included in the detailed tabulations (under separate cover).

¹⁷ Note: all activities in the TAMS questionnaire have been included in the detailed tabulations but are not necessarily referred to in this report.

B. Activity-Based Trip Motivators

1. Major Category Motivators

Group Tourists in Western Canada, like *all* tourists in the region, have varied interests. They are not readily pigeon-holed into a single type of trip or a single set of activities. There is, in fact, considerable overlap or duplication in these Americans' activity-based trip motivations.

- About two-thirds of Western Canada's Group Tourists have taken overnight trips motivated by **nature or outdoor activities**;
- Close to half took trips motivated by **culture and learning-oriented activities** such as museums, art galleries, or performances, hands-on learning experiences and Aboriginal culture;
- The same proportion took trips in order to go to theme parks or other **entertainment activities** including casinos;
- About one-third of the U.S. Group Tourists who have recently travelled in Western Canada have taken trips for a resort, spa or wilderness lodge experience (**Lodging**);
- About one-quarter have been motivated by their **culinary or wine** interests and/or in order to attend a **sporting event**.
- **Shopping**, while a very popular trip activity (*any*), does not tend to be a trip driver for most of Western Canada's Group Tourists.

At this high level of activity aggregation, Group Tourists very closely resemble *all* overnight pleasure visitors in Western Canada with respect to the activities that motivate their travel. Their recent trips are, however, more likely to be driven by **cultural and/or learning activities** (47%) than is the Western Canada overnight pleasure traveller as a whole (38%).

Within the Western region, trip drivers for American Group Tourists to Alberta and British Columbia are very similar to one another. While the base is small, higher proportions of Yukon Group Tourists identify **cultural and/or learning activities, entertainment activities, lodging** and **food/wine** activities as trip drivers than is the case for Alberta's and British Columbia's Group Tourists.

	American Overnight Pleasure Travellers to Destinations in Western Canada				
	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Participatory Outdoor Activities	62%	65%	71%	64%	71%
Cultural/Learning Activities & Events	38%	47%	50%	48%	61%
Theme/Amusement Parks/Other Entertainment/Events	44%	45%	49%	45%	58%
Food & Wine	21%	24%	29%	24%	39%
Lodging	31%	33%	39%	34%	44%
Shopping	12%	15%	18%	14%	24%
Spectator Sports	21%	24%	28%	24%	25%
Team Sports, Tournaments, Games	9%	10%	7%	10%	9%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, pages 7, 8, 9, 10, 11. *Caution: small base size.

2. Intermediate Category Motivators

a) Participatory Outdoor Activities

Participatory outdoor activity-based motivators for Western Canada's Group Tourists are very similar to those of all American overnight pleasure tourists with recent trips to the region. These tourists are most commonly driven by **land-based** outdoor activities, including **flora and fauna viewing** and going to **nature parks**.

Among observers of plants and animals, *whale watching* and *land animal viewing* are the most commonly named as the *reason* an overnight trip was taken. Whale and/or land-based animal viewing are more likely to be named as trip drivers by Western Canada's group market than by typical U.S. visitors to the region. These activities are especially prominent trip drivers for the Yukon's Group Tourists.

Going to a **nature park** (national/provincial/ state) motivates overnight trips for about one-quarter of Group Tourists in Western Canada. **Camping**, particularly in a public campground of a national or provincial park, motivates trips for about 1-in-7 Group Tourists.

Popular **water-based** outdoor trip drivers like land-based drivers, tend to involve relatively *soft* interactions with the outdoors – **sunbathing** and **fishing**.

Of the various **winter activities** that might motivate overnight trips for Group Tourists, *alpine skiing* is the most popular, by far. At least one-eighth of tourists in each of the Western regional markets claim that they have taken trips over the past two years in order to alpine ski.

Note to Readers

All intermediate activity categories that are *main reasons* for a trip by at least 1-in-10 Group Tourists are displayed in summary tables in the Intermediate Category Motivator sections of this report.

For the full list of individual activities as main reasons and all activities engaged in on a recent overnight trip (*any participation*), see detailed tabulations (under separate cover).

TABLE 21: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW | American Overnight Pleasure Travellers to Destinations in Western Canada

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	Columbia	British Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Participatory Outdoor Activities	62%	65%	71%	64%	71%
Outdoor Water Based Activities	39%	42%	36%	42%	49%
Fishing	11%	9%	8%	10%	15%
Sunbathing at beach	13%	15%	11%	16%	12%
Outdoor Winter Activities	19%	20%	17%	19%	25%
Alpine skiing	13%	13%	13%	12%	16%
Outdoor Land Based Activities	49%	53%	59%	53%	59%
Hiking (Day hikes/backpacking overnight)	12%	11%	11%	10%	16%
Flora/Fauna Viewing	17%	23%	26%	22%	43%
Whale watching/other marine life	10%	16%	15%	14%	33%
Land-based animals	10%	14%	15%	14%	29%
Nature park	23%	24%	31%	25%	22%
Camping	14%	15%	18%	16%	21%
Cultural/Learning Activities & Events	38%	47%	50%	48%	61%
Theme/Amusement Parks/Other					
Entertainment/Events	44%	45%	49%	45%	58%
Food & Wine	21%	24%	29%	24%	39%
Lodging	31%	33%	39%	34%	44%
Shopping	12%	15%	18%	14%	24%
Spectator Sports	21%	24%	28%	24%	25%
Team Sports, Tournaments, Games	9%	10%	7%	10%	9%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, pages 7, 8, 9, 10, 11. *Caution: small base size.

b) Cultural/Learning Activities & Events

Group Tourists in Western Canada are more likely to take trips in order to experience a wide variety of cultural or learning activities (47%) than are Americans who have recently taken an overnight pleasure trip in the region (38%).

Approximately 2-in-10 Group Tourists in the region take trips in order to see **historic sites and buildings** (23%), to go to classical music, live theatre or other arts **performances** (18%), and/or to go to **museums** with general history or science and technology themes (18%). Activities more prevalent as motivators within the Group Tourist segment than among typical American visitors to Western Canada include historic sites and buildings, Aboriginal culture and museums.

The Yukon's Group Tourist market seems particularly interested in historic sites and buildings (31%), Aboriginal cultural activities (28%) and hands-on learning experiences (20%) relative to the group markets in Alberta and British Columbia.

TABLE 22: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW | American Overnight Pleasure Travellers to Destinations in Western Canada

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Participatory Outdoor Activities	62%	65%	71%	64%	71%
Cultural/Learning Activities & Events	38%	47%	50%	48%	61%
Aboriginal Culture/Events	8%	14%	14%	14%	28%
Performing Arts	14%	18%	17%	19%	22%
Classical Concerts, Jazz, Opera	8%	10%	9%	10%	13%
Live theatre	9%	12%	11%	13%	13%
Cultural Festivals/Events	7%	10%	10%	10%	12%
Exhibits, Architecture, Historic Sites & Museums	23%	32%	36%	31%	43%
Historic sites, buildings	17%	23%	22%	21%	31%
Museums	13%	18%	26%	18%	25%
Strolling Around a City to Observe Architecture	13%	16%	15%	16%	17%
Hands on Learning Activities	8%	12%	16%	12%	20%
Theme/Amusement Parks/Other					
Entertainment/Events	44%	45%	49%	45%	58%
Food & Wine	21%	24%	29%	24%	39%
Lodging	31%	33%	39%	34%	44%
Shopping	12%	15%	18%	14%	24%
Spectator Sports	21%	24%	28%	24%	25%
Team Sports, Tournaments, Games	9%	10%	7%	10%	9%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, pages 7, 8, 9, 10, 11. *Caution: small base size.

c) Entertainment Activities & Events

In terms of the entertainment activities that motivate recent overnight travel, U.S. tourists in the Western Canada group segment closely resemble all Americans with recent overnight pleasure trips to Western Canada.

- No specific type of *fair or festival* is particularly prominent among Western Canada's Group Tourists although about one-fifth indicate that some type of fair or festival is a trip motivation;
- **Amusement parks** followed by **casinos** and **gardens/aquariums/zoos** are also motivators for between one-quarter and one-fifth of Western Canada's Group Tourists.
- No individual *other entertainment* activity such as country/western or popular music concerts, circuses, or dinner theatre emerges as a strong travel motivator.

Group Tourists who have recently visited Alberta are more apt to take trips in order to visit botanical gardens, zoos and aquariums than are typical American tourists to the region.

TABLE 23: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW | American Overnight Pleasure Travellers to Destinations in Western Canada

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Participatory Outdoor Activities	62%	65%	71%	64%	71%
Cultural/Learning Activities & Events	38%	47%	50%	48%	61%
Theme/Amusement Parks/Other Entertainment/Events	44%	45%	49%	45%	58%
Fairs/Festivals	19%	21%	26%	21%	27%
Casinos	15%	18%	23%	19%	21%
Theme/Amusement Parks/Movies	21%	24%	23%	25%	29%
Gardens/Aquariums/Zoos/Planetariums	15%	18%	23%	19%	20%
Other Entertainment	19%	21%	20%	23%	30%
Food & Wine	21%	24%	29%	24%	39%
Lodging	31%	33%	39%	34%	44%
Shopping	12%	15%	18%	14%	24%
Spectator Sports	21%	24%	28%	24%	25%
Team Sports, Tournaments, Games	9%	10%	7%	10%	9%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, pages 7, 8, 9, 10, 11. *Caution: small base size.

d) Food & Wine Activities

Approximately one-fifth of Western Canada's Group Tourists take overnight trips for dining experiences, to visit wineries on day trips and/or to engage in other food or beverage-related activities. Interest in these activities is about on par with *all* overnight pleasure tourists to the region and is somewhat more pronounced among Group Tourists who have recently been to the Yukon.

TABLE 24: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW | American Overnight Pleasure Travellers to Destinations in Western Canada

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Participatory Outdoor Activities	62%	65%	71%	64%	71%
Cultural/Learning Activities & Events	38%	47%	50%	48%	61%
Theme/Amusement Parks/Other					
Entertainment/Events	44%	45%	49%	45%	58%
Food & Wine	21%	24%	29%	24%	39%
Dining	12%	13%	17%	13%	22%
Wine/Beer	9%	11%	13%	10%	17%
Day visits to wineries	9%	10%	12%	9%	15%
Lodging	31%	33%	39%	34%	44%
Shopping	12%	15%	18%	14%	24%
Spectator Sports	21%	24%	28%	24%	25%
Team Sports, Tournaments, Games	9%	10%	7%	10%	9%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, pages 7, 8, 9, 10, 11. *Caution: small base size.

e) Lodging Activities

The extent to which lodging-based activities are trip motivators among Western Canada's Group Tourists is almost identical to *all* American overnight pleasure tourists to the region, with no single type of lodging emerging as dominant.

- Consistent with their interest in sunbathing and sitting on beaches, 1-in-7 of Western Canada's Group Tourists take overnight trips to stay in **seaside resorts**.
- In turn, consistent with their interest in alpine skiing, 1-in-10 also take overnight trips motivated by a stay in a **ski resort**.
- While a trip motivator for about 1-in-8 Group Tourists, **camping** is equally popular among typical American visitors to Western Canada. Note that camping is also included in *outdoor land-based* activity motivators since for many campers, the experience is as much or more about enjoying the outdoors as it is about lodging.
- Staying at a **wilderness or remote lodge** as a reason for taking a trip is more common among Group Tourists with recent trips to Alberta and the Yukon than among those who have recently been to British Columbia, but remains a comparatively small niche market for Group Tourists in Western Canada (7%).¹⁸

¹⁸ Even though they do not meet the 10% threshold for display in the summary tables, wilderness lodges are shown here because of this niche market's importance to some parts of Western Canada.

TABLE 25: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW | **American Overnight Pleasure Travellers to Destinations in Western Canada**

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Participatory Outdoor Activities	62%	65%	71%	64%	71%
Cultural/Learning Activities & Events	38%	47%	50%	48%	61%
Theme/Amusement Parks/Other Entertainment/Events	44%	45%	49%	45%	58%
Food & Wine	21%	24%	29%	24%	39%
Lodging	31%	33%	39%	34%	44%
Wilderness/Remote Lodges**	5%	7%	11%	5%	12%
Resort/Spa	22%	23%	25%	23%	24%
Seaside resort	12%	14%	12%	15%	12%
Ski/mountain resort	10%	10%	7%	10%	8%
Public campground	11%	12%	15%	12%	17%
Other Lodging	16%	18%	25%	19%	31%
Shopping	12%	15%	18%	14%	24%
Spectator Sports	21%	24%	28%	24%	25%
Team Sports, Tournaments, Games	9%	10%	7%	10%	9%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, pages 7, 8, 9, 10, 11. *Caution: small base size. **Wilderness lodges are included because they are of importance to Western Canada but do not meet the 10% threshold.

VI. Trip Planning

A. Who Does the Planning?

By and large, responsibilities for trip planning within the group tourist market are the same as those of *all* American overnight pleasure travellers to Western Canada. Specifically, over 8-in-10 consumers with recent trips to Western Canada 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 individual who completed the survey or is shared with other household members.

TABLE 26: TRAVEL PLANNING	American Overnight Pleasure Travellers to Destinations in Western Canada				
	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Frequency of personal involvement in trip planning, past 2 years					
All	69%	65%	57%	65%	74%
Most	17%	16%	15%	17%	12%
Some	10%	13%	18%	12%	8%
None/not stated	5%	7%	10%	6%	6%
Main responsibility for trip planning					
Respondent	40%	38%	39%	40%	35%
Spouse/partner	20%	23%	16%	22%	35%
Shared with other household member	27%	23%	24%	22%	14%
Other/not stated/not involved in travel planning	11%	15%	20%	14%	15%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, pages 16, 17. *Caution: small base size.

B. Travel Information Sources & Travel Media

Of the many sources of travel information available to consumers, the **internet** is the most widely used. It tops the charts for virtually all U.S. overnight pleasure travellers to Western Canada. There are, however, some differences in information sources used for travel planning among group tourists and American overnight pleasure travellers to Western Canada as a whole.

The most salient, though anticipated, difference between Group Tourists and typical American overnight pleasure travellers to Western Canada is the higher level of reliance on **travel agents** by those who make group bookings. Three-fifths of Group Tourists rely on travel agents as a source of information (59%), compared to about two-fifths (38%) of typical American overnight pleasure travellers to the region.

Although still predominant, the internet is somewhat less likely to be used as a travel planning tool by Group Tourists (72%) than by Western Canada's U.S. market as a whole (81%).

Travel information sources capturing the attention of at least one-third of all Americans with recent overnight pleasure trips in Western Canada and those in the Group Tourist segment are listed in rank order below (high to low). The lists reveal a high degree of commonality albeit, with some differences in priorities, and a predisposition on the part of Group Tourists to rely on a larger number of information sources than does the market as a whole.

Travel Information Sources for at least 1-in-3 Western Canada U.S. Pleasure Tourists (in rank order in each column)

<u>All</u>	<u>Group Tourists</u>
Internet website	Internet website
Past experience	Travel agent
Advice of friends/relatives	Past experience
Maps	Advice of friends/relatives
Official DMO travel guides	Maps
Newspaper articles or ads	Official DMO travel guides
Travel agent	Newspaper articles or ads
Auto club	Travel information in mail
	Auto club
	Travel guide books

With 7-in-10 Group Tourists 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 destinations and travel businesses in Western Canada. About half of the Group

Tourists in this region also claim to watch **televised travel shows** normally and somewhat fewer say they frequently read the **travel section** in their local newspaper's weekend (40%) and/or weekday edition (43%). More than one-third of group travellers say that they read **travel magazines** in a typical month. These levels of engagement with televised and print travel media are somewhat higher than those evident for Americans who take pleasure trips to Western Canada as a whole.¹⁹

TABLE 27: INFORMATION SOURCES FOR TRAVEL PLANNING & GENERAL MEDIA HABITS American Overnight Pleasure Travellers to Destinations in Western Canada

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
<u>SOURCES OF TRAVEL PLANNING INFO</u>					
Travel agent	38%	59%	49%	59%	65%
Internet website	81%	72%	61%	74%	63%
Electronic newsletters via e-mail	12%	13%	15%	12%	20%
Auto club	38%	40%	39%	42%	41%
Any newspaper	40%	41%	38%	42%	55%
Articles	36%	38%	37%	39%	50%
Advertisements	19%	22%	21%	22%	38%
Visitor information centres	29%	29%	29%	30%	44%
Travel guide books	29%	32%	22%	35%	34%
Advice of friends/relatives	53%	50%	49%	51%	56%
Trade, travel, sportsmen's shows	6%	8%	9%	9%	10%
Any television	18%	20%	18%	21%	27%
Programs	16%	18%	17%	19%	24%
Advertisements	6%	7%	5%	8%	11%
Travel information in mail	30%	41%	49%	40%	61%
Past experience	59%	52%	52%	52%	57%
Maps	48%	43%	44%	44%	47%
Official DMO travel guides	41%	43%	44%	44%	55%
<u>TRAVEL MEDIA</u>					
Frequently read newspaper Travel Section					
In weekday editions	34%	43%	40%	44%	49%
In weekend editions	35%	40%	33%	41%	43%
Read Travel Magazines in typical month	27%	37%	26%	38%	39%
Normally watch Travel Shows on TV	47%	54%	53%	55%	65%
Normally visit Travel websites	56%	54%	45%	56%	47%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, pages 18, 28, 29, 30, 32. 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. *Caution: small base size.

¹⁹ 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

Over three-fifths of American overnight pleasure travellers to Western Canada and the Group Tourists who use the internet for travel planning explore travel sites such as *Expedia*, airlines and hotels/resort sites. Destination marketing organization sites are used by about half of these tourists.

Likely because of the strength of the cruise market in British Columbia (54%) and the Yukon (70%), *cruise sites* are especially likely to be explored by internet users in the group market who have visited these destinations recently. In contrast, Group Tourists with recent travel experiences in Alberta are not especially likely to explore cruise sites (29%) but do tend to visit *attraction* sites when planning a trip (47%) at a higher rate than other western Group Tourists.

Internet use for travel planning is less characteristic of Western Canada's Group Tourists than it is of all American pleasure visitors to the region. It is, therefore, not surprising that *booking* on line is also less common. Fewer than half of *all* Group Tourists in Alberta and the Yukon claim to have purchased travel goods or services on-line whereas two-thirds of the typical U.S. overnight pleasure market say they do so. As their website preferences would suggest, the most common on-line bookings are air tickets, followed by accommodation and car rentals.

TABLE 28: WEBSITE USAGE FOR TRAVEL PLANNING | **American Overnight Pleasure Travellers to Destinations in Western Canada**

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Used Internet website for travel planning, past 2 years	81%	72%	61%	74%	63%
	(100%)	(100%)	(100%)	(100%)	(100%)
<u>Internet website(s) used</u> (Among Users)					
Travel planning/booking	68%	61%	50%	62%	65%
Airline	66%	68%	70%	70%	67%
Destination marketing organization	50%	47%	55%	45%	62%
Hotel/resort	65%	62%	63%	62%	67%
Motorcoach	3%	5%	8%	4%	14%
Cruise	34%	53%	29%	54%	70%
Attraction	40%	34%	47%	34%	24%
Other	31%	29%	37%	27%	35%
Any Internet Purchases in Past 2 Years (Among All Overnight Pleasure Travellers)	66%	56%	42%	59%	47%
<u>Items Purchased On-Line</u> (Among Purchasers)	(100%)	(100%)	(100%)	(100%)	(100%)
Air tickets	85%	85%	77%	87%	77%
Rail, bus, boat tickets	25%	31%	27%	33%	33%
Accommodation	76%	72%	66%	74%	78%
Tickets for activities/attractions	34%	42%	44%	43%	48%
Car rental	55%	57%	40%	59%	51%
Package deal (2+ items)	30%	38%	35%	36%	39%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, pages 19, 20. *Caution: small base size.

VII. Other Travel-Related Information

A. Use of Package Deals

Since most “group tours” are sold as *packages*, it is not surprising that purchase of package deals in the past two years is appreciably more common among Group Tourists than it is among the average U.S. overnight pleasure traveller to Western Canada. Close to 3-in-4 Group Tourists claim that *most* or *all* of the trips they took in the past two years were “package deals”.

Most Group Tourist buyers want a package to include accommodation, followed by transportation to the destination, transportation at the destination, and tickets for activities and attractions. Somewhat fewer would like the package to include food and beverages.

TABLE 29: PACKAGE DEALS	American Overnight Pleasure Travellers to Destinations in Western Canada				
	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Frequency of Purchasing Packages in Past 2 Years					
Most/all trips	7%	14%	17%	13%	21%
One/some trips	41%	60%	51%	62%	58%
No trips/not stated/not sure	52%	27%	32%	25%	21%
Desired Components of Packages (Among Purchasers of Packages)	(100%)	(100%)	(100%)	(100%)	(100%)
Transport to destination	89%	90%	90%	89%	97%
Transport at destination	74%	82%	88%	81%	87%
Accommodation	96%	97%	98%	96%	97%
Food and beverage	52%	62%	72%	61%	51%
Tickets for activities/attractions	68%	75%	80%	74%	75%
Other	26%	30%	36%	29%	26%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, page 21. *Caution: small base size.

B. Benefits Sought From Pleasure Travel

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 *no importance* to *highly important*. The figures presented in this section are the proportion of tourists who claim a benefit is *highly important*.

At the top of the benefit list for Group Tourists is **seeing and/or doing something new and different**. Clearly, for these tourists, a vacation should provide novelty. It should also be the basis for lasting **memories**. By seeing and doing different things, the vacation becomes a **break from the day-to-day** environment and **relieves stress**.

The most commonly cited benefits of vacations deemed important by Group Tourists and all Americans with recent overnight pleasure travel experiences in Western Canada are the same, with only moderate shifts in emphasis among the top-five positions.

5 Top *Highly Important* Benefits in Rank Order Among American Pleasure Tourists in Western Canada²⁰

<u>All</u>	<u>Group</u>
Break from day-to-day	New/different
Relax/relieve stress	Memories
Memories	Break from day-to-day
New/different	Relax/relieve stress
Relationship with partner/children	Relationship with partner/children

The same benefits are **least** likely to be deemed *highly important* to American visitors whether or not they engage in group travel. These less sought outcomes of vacations include renewal of non-family personal connections, stories, pampering, physical challenges, and, at the bottom of everyone's list, solitude and isolation.

Although base sizes are small, the Yukon Group Tourist market differs somewhat from Americans with recent pleasure trips to Alberta or British Columbia. Specifically, Yukon Group Tourists are especially apt to name the following as *highly important* benefits of vacations:

- *To create lasting memories*
- *To enrich your perspective on life*
- *To gain knowledge of history, other cultures or other places.*

²⁰ For full array, see Table 28.

TABLE 30: BENEFITS SOUGHT FROM PLEASURE TRAVEL (HIGHLY IMPORTANT)	American Overnight Pleasure Travellers to Destinations in Western Canada				
	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	Columbia	British Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
<i>% Stating "Highly Important"</i>					
See/do something new/different	59%	66%	70%	68%	62%
Create lasting memories	61%	63%	68%	62%	75%
Break from day-to-day environment	62%	54%	39%	54%	49%
Relax/relieve stress	62%	54%	48%	54%	53%
Enrich relationship with partner/children	52%	50%	46%	50%	50%
Knowledge of history, cultures, places	35%	40%	42%	40%	52%
Enrich perspectives	35%	40%	35%	41%	56%
No fixed schedule	41%	35%	33%	34%	49%
Keep family ties alive	39%	35%	43%	33%	40%
Stimulate mind/intellectual challenge	28%	31%	34%	31%	38%
Renew personal connections (non-family)	18%	18%	21%	18%	18%
To be pampered	14%	18%	14%	18%	15%
Physical challenge	15%	15%	17%	13%	22%
Stories to share	13%	14%	12%	13%	26%
Solitude and isolation	10%	8%	3%	8%	13%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, page 23. *Caution: small base size.

C. Incidence of Summer/Winter Trips

Almost all Group Tourists in Western Canada say that they have taken an overnight pleasure trip during the summer months (88%) and almost as many make the same claim about winter (83%). These levels of summer and winter travel are essentially the same among Group Tourists and American overnight pleasure travellers to Western Canada as a whole.

	American Overnight Pleasure Travellers to Destinations in Western Canada				
	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Took Overnight Pleasure Trip in Past 2 Years In . . .					
Summer	89%	88%	84%	89%	86%
Winter	80%	83%	73%	85%	88%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, page 22. *Caution: small base size.

D. Incidence of Overnight Cruises

Overnight cruises represent a growth market and one that is especially important to tourism businesses in British Columbia and the Yukon. The “organized” nature of cruise travel likely explains why Group Tourists in Western Canada are appreciably more likely to have taken an overnight cruise recently (74%) than are typical visitors to the region (48%).

About half of all Group Tourists in the region claim to have taken an ocean cruise to Alaska in the past two years or so. This proportion dips noticeably among Alberta’s Groups Tourists (23%) and increases substantively among those who have been to British Columbia (47%) and the Yukon (75%). Ocean cruises, whether to Alaska, the Caribbean or other destinations are considerably more popular than Great Lakes cruises.

TABLE 32: INCIDENCE OF OVERNIGHT CRUISE TRIPS – PAST 2 YEARS | American Overnight Pleasure Travellers to Destinations in Western Canada

	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Took any overnight cruise in past 2 years	48%	74%	57%	75%	86%
Type of Cruise/Destination					
Ocean - Alaska	28%	47%	23%	47%	75%
Ocean - Caribbean	18%	29%	28%	32%	36%
Ocean – Other	16%	28%	22%	28%	28%
Great Lakes	2%	4%	6%	2%	8%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, page 14. *Caution: small base size.

E. Memberships in Various Organizations

Memberships in auto clubs and frequent flyer programs are characteristic of approximately two-thirds of Western Canada's Group Tourists. Auto club membership is somewhat higher than that found among American overnight pleasure travellers to Western Canada in total. Frequent flyer and, at a much reduced level, hotel or car rental loyalty program memberships are at close to parity between all U.S. visitors to Western Canada and those in the group tour market.

TABLE 33: MEMBERSHIPS	American Overnight Pleasure Travellers to Destinations in Western Canada				
	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Auto club	59%	68%	64%	68%	70%
Frequent flyer program	60%	62%	57%	65%	54%
Hotel/car rental loyalty program	39%	38%	30%	40%	29%
Sports club	25%	30%	26%	32%	29%
Community service club	18%	25%	24%	24%	36%
Book/reading club	13%	19%	31%	18%	20%
Travel club	11%	17%	20%	17%	24%
Nature/environmental club	9%	11%	16%	11%	10%
Hobby club	8%	11%	14%	12%	8%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, page 33. *Caution: small base size.

VIII. Appendices

A. Activity-Based Trip Motivators – Major & Intermediate Categories

TABLE A1: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW	American Overnight Pleasure Travellers to Destinations in Western Canada				
	Total	Group Tourists with Overnight Pleasure Trips in . . .			
		Western Canada	Alberta	British Columbia	Yukon*
Unweighted base	(1,966)	(541)	(141)	(464)	(91)
Weighted, Projected	6.2 million	2.0 million	506,000	1.7 million	375,000
Participatory Outdoor Activities	62%	65%	71%	64%	71%
Outdoor Water Based Activities	39%	42%	36%	42%	49%
Fishing	11%	9%	8%	10%	15%
Sunbathing at beach	13%	15%	11%	16%	12%
Outdoor Winter Activities	19%	20%	17%	19%	25%
Alpine skiing	13%	13%	13%	12%	16%
Outdoor Land Based Activities	49%	53%	59%	53%	59%
Hiking (Day hikes/backpacking overnight)	12%	11%	11%	10%	16%
Flora/Fauna Viewing	17%	23%	26%	22%	43%
Whale watching/other marine life	10%	16%	15%	14%	33%
Land-based animals	10%	14%	15%	14%	29%
Nature park	23%	24%	31%	25%	22%
Camping	14%	15%	18%	16%	21%
Cultural/Learning Activities & Events	38%	47%	50%	48%	61%
Aboriginal Culture/Events	8%	14%	14%	14%	28%
Performing Arts	14%	18%	17%	19%	22%
Classical Concerts, Jazz, Opera	8%	10%	9%	10%	13%
Live theatre	9%	12%	11%	13%	13%
Cultural Festivals/Events	7%	10%	10%	10%	12%
Exhibits, Architecture, Historic Sites/Buildings & Museums	23%	32%	36%	31%	43%
Historic sites, Buildings	17%	23%	22%	21%	31%
Museums	13%	18%	26%	18%	25%
Strolling Around a City to Observe Architecture	13%	16%	15%	16%	17%
Hands on Learning Activities	8%	12%	16%	12%	20%
Theme/Amusement Parks/Other Entertainment/Events	44%	45%	49%	45%	58%
Fairs/Festivals	19%	21%	26%	21%	27%
Casinos	15%	18%	23%	19%	21%
Theme/Amusement Parks/Movies	21%	24%	23%	25%	29%
Gardens/Aquariums/Zoos/Planetariums	15%	18%	23%	19%	20%
Other Entertainment	19%	21%	20%	23%	30%
Food & Wine	21%	24%	29%	24%	39%
Dining	12%	13%	17%	13%	22%
Wine/Beer	9%	11%	13%	10%	17%
Day visits to wineries	9%	10%	12%	9%	15%
Lodging	31%	33%	39%	34%	44%
Wilderness/Remote Lodges**	5%	7%	11%	5%	12%
Resort/Spa	22%	23%	25%	23%	24%
Seaside resort	12%	14%	12%	15%	12%
Ski/mountain resort	10%	10%	7%	10%	8%
Other Lodging	16%	18%	25%	19%	31%
Shopping	12%	15%	18%	14%	24%
Spectator Sports	21%	24%	28%	24%	25%
Team Sports, Tournaments, Games	9%	10%	7%	10%	9%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 3, pages 7, 8, 9, 10, 11. *Caution: small base size. **Wilderness lodges are included because they are of importance to Western Canada but do not meet the 10% threshold.

B. Trip Activity Groupings

The following major and intermediate categories are used throughout this report and appear in the tabulations. The table identifies the individual activities that contribute to each intermediate group and the intermediate groups that contribute to forming the major category. Note that some activities are included more than once (see “duplication”).

Major Groups	Intermediate Groups	Individual Activities	Duplication
Any Participatory Outdoor Activities			
	Any Outdoor Water Based Activities (NET)		
	Fishing (Any)		
		Fishing — fresh water	
		Fishing — salt water	
		Fishing — trophy fishing	
	Kayaking/canoeing (Any)		
		Kayaking or canoeing — freshwater	
		Kayaking or canoeing — ocean	
	Motor/Sail boating (Any)		
		Motor boating	
		Sailing	
	White water rafting		
	Diving/snorkelling (Any)		
		Scuba diving in lakes/streams	
		Scuba diving in sea/ocean	
		Snorkelling in lakes or rivers	
		Snorkelling in sea/ocean	
	Other Water-Based Activities (NET)		
		Parasailing	
		Kite surfing	
		Sunbathing or sitting on a beach	
		Swimming in lakes	
		Swimming in oceans	
		Water skiing	
		Wind surfing	
	Any Outdoor Winter Activities (NET)		
	Nordic Skiing (Any)		
		Skiing — Cross country	
		Skiing — Cross country or back country as an overnight touring trip	
		Skiing — Ski Joring	
	Alpine Skiing (Any)		
		Skiing — Downhill	
		Skiing — Heli-skiing	
		Snowboarding	
	Snowmobiling (Any)		
		Snowmobiling — Day use on organized trail	
		Snowmobiling — As an overnight touring trip	
	Other Outdoor Winter (Any)		
		Dog sledding	
		Fishing — ice fishing	
		Ice-skating	
		Snowshoeing	

Major Groups	Intermediate Groups	Individual Activities	Duplication
	Any Outdoor Land Based Activities (NET)		
	ATVs (Any)		
		All terrain vehicle (ATV) — Used one as part of a same day excursion while on a trip of one or more nights	
		All terrain vehicle (ATV) — Used one as part of an overnight touring trip	
	Climbing (Any)		
		Climbing — Ice climbing	
		Climbing — Rock climbing	
		Climbing — Mountain climbing/trekking	
	Cycling (Any)		
		Cycling — Recreational cycling, same day excursion	
		Cycling — Mountain biking	
		Cycling — as an overnight touring trip	
	Golf (Any)		
		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	
	Hiking (Any)		
		Hiking — same day excursion while on a trip of one or more nights	
		Hiking/Backpacking in wilderness settings with overnight camping or lodging	
	Horseback riding (Any)		
		Horseback riding — same day horseback riding excursion while on a trip of one or more nights	
		Horseback riding — traveled by horse with an overnight stop along the way	
	Hunting (Any)		
		Hunting — Big game	
		Hunting — Small game	
		Hunting — Birds	
	Motorcycling (Any)		
		Motorcycling — day excursion while on a trip of one or more nights	
		Motorcycling — as an overnight touring trip	
	Nature park — visited national, provincial/state park		
	Flora/Fauna Viewing (Any)		
		Wildflowers/flora viewing	
		Wildlife viewing — Bird watching	
		Wildlife viewing — Whale watching and other marine life	
		Wildlife viewing — Land based animals	
	Camping (Any)		
		A public campground in a national, state, provincial or municipal park	Also in lodging
		A private campground	Also in lodging
		A camp site in a wilderness setting (not a campground)	Also in lodging
	Other Outdoor Land/Air Activities (Any)		
		Bungee jumping	
		In-line/roller blading	
		Mini-golf	
		Skateboarding	
		Viewing northern lights	
		Hang gliding	
		Hot air ballooning	
		Parachuting	
		Fitness — Jogging or exercising outdoors	
Cultural/Learning Activities & Events			
	Aboriginal Culture/Events (Any)		

Major Groups	Intermediate Groups	Individual Activities	Duplication
		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)	Also in "food"
		Aboriginal arts and crafts shows	
		Aboriginal outdoor adventure and/or sports	
	Performing Arts (Any)		
	Music Performances (Classical/Jazz/Opera)		
		Classical or symphony concert	
		Jazz concert	
		Opera	
	Live Theatre		
	Ballet or other dance performances		
	Cultural Festivals/Events (Any)		
		International film festivals	
		Literary festivals or events	
		Music festivals	
		Theatre festivals	
	Exhibits, Architecture, Historic Sites/Buildings & Museums		
	Art galleries		
	Historic Sights/Buildings (Any)		
		Historical replicas of cities or towns with historic re-enactments	
		Paleontological/archaeological sites	
		Well known historic sites or buildings	
		Other historic sites, monuments and buildings	
	Museums (Any)		
		Museum — Children's museums	
		Museum — General history or heritage museums	
		Museum — Science or technology museums	
		Museum — Military/war museums	
		Curatorial tours	Also in Hands On
	Other Exhibits, Architecture, Historic Sites/Buildings & Museums (Any)		
		Strolling around a city to observe its buildings and architecture	
	Hands on Learning Activities (Any)		
		Archaeological digs	
		Cooking/wine tasting courses/school NET	
		Cooking/wine tasting courses	Also in food/wine
		Cooking school	Also in food
		Wine tasting school	Also in wine
		Courses to learn another language	
		Curatorial tours	Also in museums
		Harvesting and/or other farm operations	
		Historical re-enactments (as an actor)	
		Interpretive program at a historic site or national/provincial park	
		Wilderness skills courses	
Theme/Amusement Parks/Other Entertainment/Events (Any)			
	Fairs/Festivals (Any)		
		Carnivals	
		Farmers' markets or country fairs	
		Exhibitions or fairs	
		Religious festivals	
		Food/drink festivals	Also in food/wine
		Ethnic festivals	
		Western theme events, such as rodeos	
		Gay Pride parades	

Major Groups	Intermediate Groups	Individual Activities	Duplication
		Firework displays	
		Hot air balloon festivals	
		Comedy festivals	
	Casino		
	Theme/Amusement Parks/Movies (Any)		
		Amusement park	
		Garden theme park	
		Musical attractions	
		Movie theme park	
		Science & technology theme park	
		Water theme park	
		Wax museums	
		Entertainment farms (e.g. corn maze, petting barnyard)	
	Gardens/Aquariums/Zoos/Planetariums (Any)		
		Planetarium	
		Botanical gardens	
		Aquariums	
		Zoos	
	Other Entertainment		
		Country/western music concerts	
		Rock & roll / popular concert	
		Stand-up comedy clubs and other variety shows	
		Circus	
		Free outdoor performances (e.g., theatre, concerts) in a park setting	
		Live theatre with dinner	
		Went to the movies/cinema	
		Went to IMAX movie theatres	
Food & Wine (Any)			
	Dining (Any)		
		Dining — restaurants offering local ingredients and recipes	
		Dining — high-end restaurants of an international reputation	
		Dining – other high-end restaurants	
		Dining at a farm	
		Went to local outdoor cafes	
	Other Food (Any)		
		Shop or browse — gourmet foods in retail stores	
		Went fruit picking at farms or open fields	
		Visited food processing plants such as a cheese factory	
		Cooking school	Also in Lodging
		Country inn or resort because it had a gourmet restaurant on the premises	Also in Lodging
		Aboriginal cuisine (tasted or sampled)	Also in Aboriginal
	Wine/Beer (Any)		
		Went to wineries for day visits and tasting	
		Went to breweries for day visits and tasting	
		Wine tasting school	Also in Lodging
	Other Food/Wine (Any)		
		Food/drink festivals	Also in "Theme Parks/Entertainment"
		Cooking/wine tasting courses	Also in "hands on"
Lodging			
	Wilderness/Remote		
		Remote or fly-in wilderness lodge	
		Remote or fly-in wilderness outpost	
		Wilderness lodge you can drive to by car	
	Resort/Spa (Any)		
		Lakeside/riverside resort	
		Ski resort or mountain resort	
		Seaside resort	

Major Groups	Intermediate Groups	Individual Activities	Duplication
		Health spa	
	Other Lodging (Any)		
		Farm or guest ranch	
		On a houseboat	
		A motor home or RV while traveling or touring (not a camping trip)	
		A public campground in a national, state, provincial or municipal park	Also in "Outdoors"
		A private campground	Also in "Outdoors"
		A camp site in a wilderness setting (not a campground)	Also in "Outdoors"
		Wine tasting school	Also in Food/Wine
		Cooking school	Also in Food/Wine
Shopping (Any)			
		Shop or browse — bookstores or music stores	
		Shop or browse — antiques	
		Shop or browse — gourmet foods in retail stores	Also in "food"
		Shop or browse — local arts & crafts studios or exhibitions	
		Shop or browse — clothing, shoes and jewellery	
		Shop or browse — greenhouse or garden centre	
Spa (Any)			
		Day visit to a health and wellness spa while on a trip of one or more nights	
		Health spa (overnight)	Also in "Lodging"
Spectator Sports (Any)		Individual activities only – no NETS	
Team Sports, Tournaments, Games (Any)		Individual activities only – no NETS	
Other Miscellaneous Activities (Any)			
		Well known natural "wonders"	
		Fitness — Working out in a fitness centre	
		Recreational dancing	
		Photography	
Touring/Cruises			
Any Organized Group Tour			
	Any Organized/Guided Overnight Group Tour		
		Different locations	
		Single location	
	An organized or guided group day tour excursion		
Any Self-Guided 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		
	A self-guided same-day tour excursion that was not part of an organized or guided group while on a trip of one or more nights		
Any Overnight Touring (Organized/Self-guided)			
	Any Organized/Guided Overnight Group Tour		
	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		
Day Touring (Organized/Self-guided)			
	An organized or guided group day tour excursion		
	A self-guided same-day tour excursion that was not part of an organized or guided group while on a trip of one or more nights		
Any Cruise			
	Ocean cruise – Alaska		
	Ocean cruise – Caribbean		
	Ocean cruise – Other		

Major Groups	Intermediate Groups	Individual Activities	Duplication
	Great Lakes cruise		
	Cruise on the St. Lawrence River		
	Cruise on another lake or river		
	Submarine cruise		
	Some other type of cruise		
Organized Overnight Tour/Cruise (NET)			
	Any Organized/Guided Overnight Group Tour		
	Any Cruise		

C. 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