



Touring

TOURISM SECTOR PROFILE

MAY 2014

Touring at a glance in British Columbia

Average distance travelled per trip (2009)	1,700 km	Average visitor spending per trip (2009)	\$1,800
Average trip length (2009)	8.1 nights	Travel parties comprised of 2 or more adults (2009)	76%
Average number of overnight stops per trip (2009)	3.9 stops	Canadian participation of touring activity (2006)	44%
Top target markets: British Columbia, Alberta, Germany, Ontario, Washington, and United Kingdom			

Sources: Destination British Columbia, Travel Activities and Motivations Survey

About touring

Touring encompasses the range of experiences visitors participate in while travelling through a destination. Touring can be guided or self-guided and can utilize various forms of transportation (i.e., bicycle, motorcycle, motor coach, personal vehicle, rental car, or RV). Self-guided touring by motor vehicle (i.e., personal vehicle, rental car, or RV) is often referred to as the *drive market*. It is this type of touring that is the main focus of this profile. The drive market is made up of two kinds of visitors: those who drive their own vehicles from home (thus the drive to the destination is part of the experience) and those who travel to the destination by other means, typically air, and rent a vehicle to tour. Both types of visitors will choose their mode of travel for various reasons including available time, price, convenience, comfort, and flight costs.

Regardless of how the drive market arrives at their destination within British Columbia, self-guided touring provides an ideal way to move around from place to place, experiencing various parts of British Columbia, as well as enhancing economic opportunities for communities throughout the province.

With 24,000 kilometres of paved highways and approximately 60 branded driving routes, there is considerable opportunity for British Columbia to become a destination of choice for the drive market.

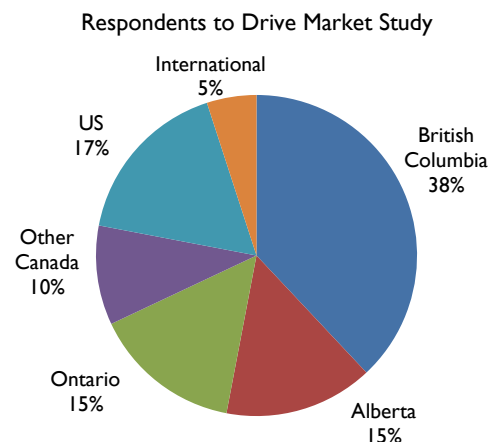
Global volume

The volume of self-guided touring visitors is not known on a global scale, however there is a better understanding of Canadian and US self-guided touring. The 2006 Travel Activities and Motivations Survey (TAMS) was a comprehensive survey of North American households examining the travel habits, activities and behaviours of

Canadian and US residents. This survey estimated 20.9 million Canadians and 176.4 million US residents took at least one overnight pleasure trip in the past 2 years (2004 and 2005). Trips including at least one overnight pleasure trip in the past 2 years to British Columbia were taken by 5.6 million Canadians and 7.0 million US residents. Of these visitors, 44% of Canadians and 24% of US residents included a self-guided touring activity on at least one overnight trip they took during the study period.

Market of interest

In 2009, the Drive Market study was conducted with people who had contacted Destination British Columbia for travel information and specified that driving was their prime interest when visiting British Columbia. The respondents for this study were made up largely of British Columbian residents; accounting for 38% of all respondents, followed by residents of Alberta and Ontario, both representing 15% of all respondents.



Source: Destination British Columbia (2009)

Canadian self-guided touring visitors who travelled to British Columbia were more likely to have also visited Alberta, but not as likely to have visited Ontario, Quebec, or the Atlantic provinces.

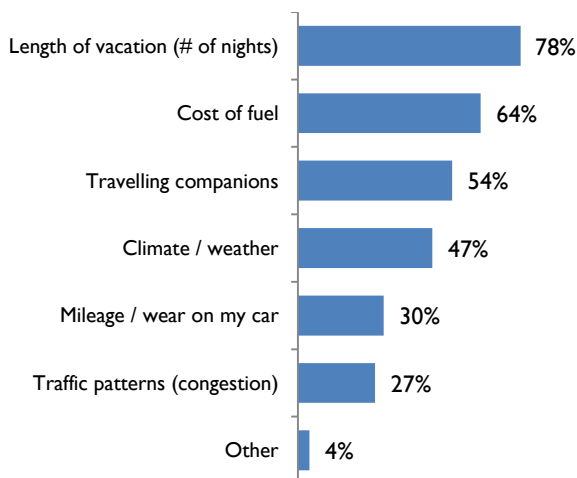
Close to two-thirds of Canadian self-guided touring visitors who have travelled within British Columbia have also travelled to the US. These visitors were more likely to have made a trip to the US than the average Canadian self-guided touring visitor.

The British Columbia drive market is motivated to travel primarily by sightseeing (76%), opportunities for relaxation (60%), and the availability of nature / scenery / parks (56%). Most self-guided touring visitors choose routes based on scenic value. Some followed official Circle Routes while in the province, while the majority incorporated parts of a route in their trip. While touring within British Columbia, the top tourism regions to visit included Greater Vancouver (47%), Thompson Okanagan (46%), and Vancouver Island (41%). Self-guided touring visitors spent on average 8 nights in British Columbia, stopping overnight, on average, at 4 different locations. The average distance travelled was 1,700 kilometres, with those in RVs travelling substantially further (2,200 kilometres). More than half of the drive market used their own vehicle to travel, while 21% used a rental car, and 13% travelled by RV.

US DRIVE MARKET

Staying Local: A Study of the US Traveler, a report published by PhoCusWright in 2013, found that the majority of self-guided touring trips by US residents within the US tend to be short (60% are 3 nights or less). Nine in 10 self-guided touring trips included at least one night in paid accommodation. The average distance travelled was 300 miles. Approximately half of selected destinations are within a 3 hour drive from home. More than 75% of the US drive market say the amount of vacation time available has the greatest bearing on trip length. Fuel costs are also an important consideration.

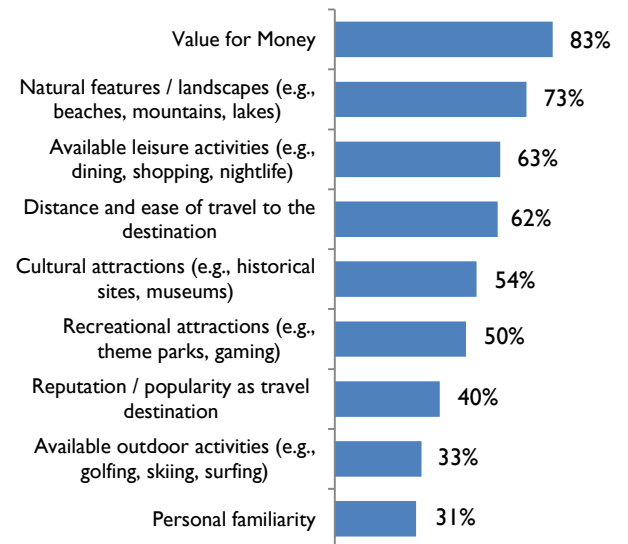
Factors that influence driving times



Source: PhoCusWright (2013)

Florida and California are the most popular destinations for the US drive market to tour. Almost half choose their destination before deciding on a mode of travel. When selecting a tourism destination, value for money was rated as an extremely important or very important influential factor for 83% of the drive market.

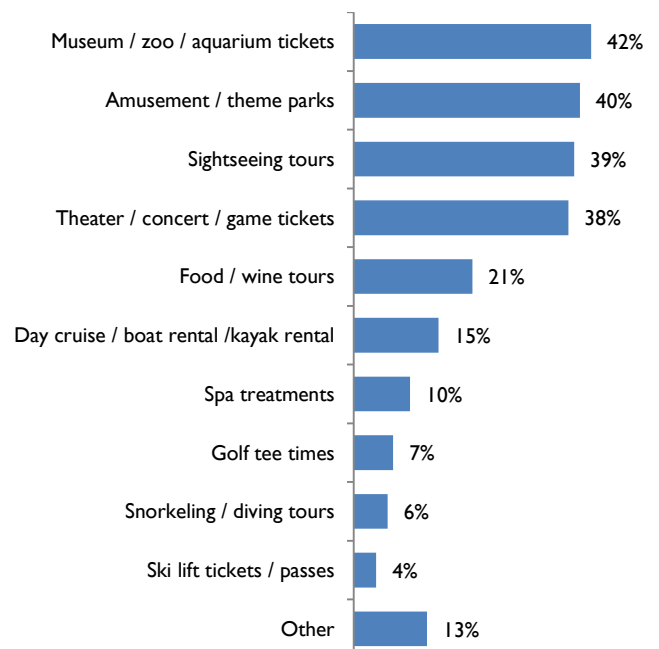
Factors that influence destination selection



Source: PhoCusWright (2013)

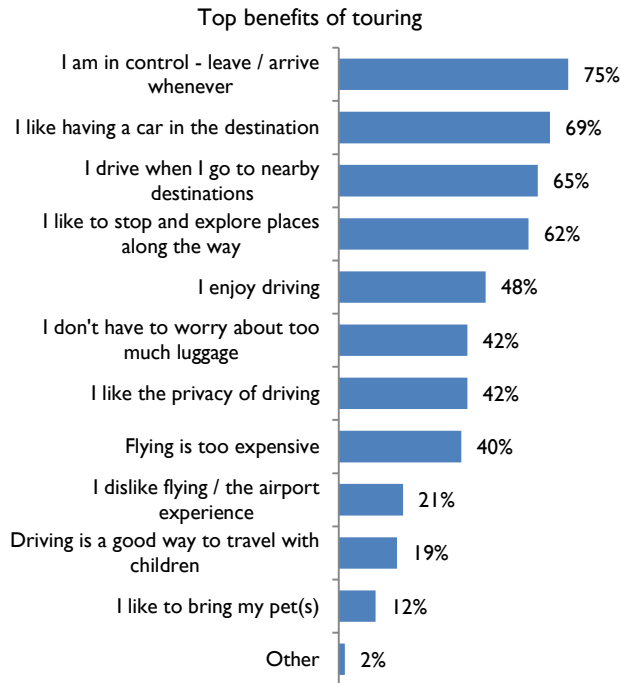
Forty percent of US self-guided touring visitors participated in at least one paid in-destination activity. Museums and zoos / aquariums are the most popular paid attractions, followed closely by amusement / theme parks.

Participation in paid destination activities



Source: PhoCusWright (2013)

Three-quarters of the US drive market find the ability of being in control and having the freedom to explore at one's own pace to be the top benefits self-guided touring offers.



Source: PhoCusWright (2013)

Visitor characteristics

According to the 2009 Drive Market study for Destination British Columbia, visitors who took a self-guided touring trip within British Columbia were almost equally likely to be female or male, predominately older (66% were 55 years or older), had at least some higher education (57%), and had a middle income (56% reported incomes between \$40,000 - \$100,000). Travel parties were comprised of two adults or more, 76% of the time.

More is known about the US drive market characteristics. According to the 2013 PhoCusWright study, self-guided touring visitors are likely to be male (56%), middle aged or older (56% are 45 years or older), have at least some higher education (35%), have a middle income (48% report incomes of between \$50,000 - \$100,000), and retired (20%). Drive market travel parties are most often comprised solely of couples (51%) or families with children (23%).

Trends

Traditionally, the drive market has been heavily reliant on printed guides and maps to choose destinations and routes. Patterns are changing with online searching and booking quickly becoming the norm. The drive market is becoming conditioned to look for online deals. Personalized, local, and time limited only travel deals are well suited to the

spontaneous nature of the drive market and may result in more unplanned trips. This is seen in the results of the 2011 US Drive Market study conducted by Mandala Research. The research which looked at US leisure travellers who spent time away from home and had driven at least on part of their trip showed that nearly half of driving vacations are planned with less than 2 weeks lead time.

Economic value

The 2009 Drive Market study found that self-guided touring visitors who travelled within British Columbia spent, on average, approximately \$1,800 per trip. Due to longer trip lengths, this spending figure is highest among overseas travellers (\$3,450 per trip) and RV travellers (\$2,300 per trip).

According to the 2011 Mandala Research study, the US drive market was worth an estimated \$148 billion in 2011. The 2013 PhoCusWright study revealed that the average spend per trip was \$1,700 US which included spending on accommodations (average of \$1,000), car rentals (\$400), and destination activities including dining (\$700).

Barriers to growth

It is important that highways and roads undergo scheduled maintenance to ensure safe travels to and from destinations. When maintenance occurs, adequate signage and communication of construction and road closures is needed in order to assist visitors who may not be familiar with alternate routes. In addition, adequate wayfinding signage along roads to mark directions would increase ease of travel.

Interpretive signage such as 'Heritage Stops of Interest' provide opportunities for self-guided touring visitors to learn the history of communities and increase the visitor's connection to the destinations.

Fuel prices strongly impact distances travelled. Gasoline prices can have a considerable bearing on overall trip cost, especially if a trip contains a substantial driving component. The price of oil and gas is dependent on many factors – global and local supply and demand, relative currency pressures, and geo-political and economic events. The high prices experienced in the past five years may be the new normal and may have an impact on the drive market over the next few years.

For more information, please contact:

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