



Touring Product Overview

BUILDING TOURISM WITH INSIGHT

TOURING

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This profile summarizes information on the touring sector in British Columbia and contains a demographic and travel profile of travellers who participated in touring activities while on a pleasure trip. Also included, is information on other outdoor and cultural activities participated in by touring travellers, a discussion of recent trends within the sector, and information related to the economic impact of the touring sector in general.

Information in this report has been compiled from several sources, including the 2006 Travel Activities and Motivations Study, the 2008 Great American Road Trip Survey from Rand McNally, and data from the Recreation Vehicle Industry Association.

Demographic Profile

DEMOGRAPHIC PROFILE OF TOURING PLEASURE TRAVELLERS

Pleasure travellers participating in the Travel Activities and Motivations Survey (TAMS) who had been to British Columbia in the past two years, were asked to indicate if they had taken either an organized or guided group tour or self-guided tour while on a trip (in the past two years)¹.

- Among Canadian touring travellers who had also made a trip to British Columbia in the past two years, a slight majority were female (53% for both guided and self-touring travellers). This trend was reversed for travellers from the US, with the majority (50% for guided touring and 53% for self-touring travellers) being male (see Table 1).
- There were also demographic differences between Canadian and American touring travellers with regard to age. Approximately one third of Canadian travellers (32% of guided touring and 33% of self-touring travellers) were between the ages of 18-34. American touring travellers, rather, were generally older with only 17% of guided touring and 20% of self-touring American travellers were between 18 and 34.
- Approximately one quarter of American touring travellers were seniors aged 65 or over (29% of guided touring and 23% of self-touring travellers), compared to less than a fifth of Canadian guided touring and self-touring travellers (15% & 11% respectively).
- The majority of Canadian travellers had household incomes of \$100,000 or more (59% for guided and 61% for self-touring travellers). This was considerably higher than US touring travellers where 37% and 39% reported incomes in the highest bracket (for guided and self tours, respectively).
- A clear majority of US travellers had completed some or all of their post-secondary education (66% and 67% for guided touring and self-touring travellers, respectively); while fewer Canadian touring travellers had done so (36% of guided touring and 35% of self-touring Canadian travellers had completed post-secondary education).
- American and Canadian travellers in all groups were similar in terms of household structure with nearly three quarters of all groups indicating that they were adult only households.

¹ Throughout this report, guided tours include organized or guided group tours where travellers included either a single or multiple locations and participated in either same-day or overnight tours. Self-guided tours include both same-day and overnight tours. Unless otherwise noted, information in this report is from the 2006 Travel Activities and Motivations Survey.

Table 1: Demographic profile of touring travellers from Canada and the US

Demographics of Touring Travellers from Canada and the US who have been to BC	Canada		US	
	Guided	Self	Guided	Self
Adults 18+	2,083,554	2,460,858	3,792,948	3,102,416
Unweighted Numbers	2,745	3139	1068	951
Gender				
Male	47.2%	47.4%	50.1%	53.3%
Female	52.8%	52.6%	49.9%	46.7%
Age				
18-34	32.2%	33.4%	17.1%	19.5%
35-44	15.9%	18.6%	10.4%	13.5%
45-54	21.7%	22.5%	21.6%	21.5%
55-64	15.3%	14.7%	22.5%	22.3%
65+	14.9%	10.8%	28.5%	23.2%
Household Income				
Under \$40,000	4.8%	4.6%	9.5%	10.7%
\$40,000-\$59,999	22.8%	21.5%	13.7%	13.7%
\$60,000-\$99,999	13.0%	12.6%	26.8%	26.5%
\$100,000 or more	58.7%	60.7%	37.0%	39.0%
Not stated	0.8%	0.6%	13.0%	10.1%
Education				
Less than Secondary	12.7%	14.4%	0.8%	1.2%
Completed Secondary	12.8%	12.9%	8.1%	6.7%
Some Post Secondary	28.0%	27.0%	22.7%	22.2%
Completed Post Secondary	35.6%	34.9%	65.9%	66.9%
Other	0.0%	0.0%	0.6%	0.5%
Not stated	10.9%	11.0%	2.0%	2.6%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights that included either an organized or guided group tour or self-guided tour.

DEMOGRAPHICS BY SPECIFIC TOURING ACTIVITY – CANADIAN PLEASURE TRAVELLERS WHO HAVE TRAVELLED TO BRITISH COLUMBIA

Data from TAMS also permits a more detailed exploration into demographic differences between travellers who participated in different types of touring activities. Distinctions could be made between those who participated in same-day trips, compared to those who participated in touring trips either to single or multiple locations (see Table 2).

- Among Canadian touring travellers, there was very little difference between any categories of guided or self-touring activity with regard to gender, with slightly more females participating in touring activities compared to males. The highest difference was seen among those taking guided tours to a single location where 54% were female.
- Although the largest percentage of all touring travellers were in the youngest age group (18 to 34), those who took self-guided tours and those who participated in guided same-day trips were more likely to be younger with over one third of all participants in these tour activities under 34 years of age. Among those taking guided tours to a single location, 23% were seniors age 65 or older.
- All touring groups were similar in terms of household income and level of educational attainment.

Table 2: Demographics by specific tour activity types for travellers from Canada

Demographics of Canadian Travellers who have been to BC by Tour Type	Guided			Self	
	Single location	Multiple locations	Same-day	Multiple locations	Same-day
Total	471,033	680,719	1,611,909	1,288,265	1,998,595
Unweighted Numbers	697	988	2,076	1,547	2,607
Gender					
Male	46.1%	46.7%	46.7%	47.2%	46.5%
Female	53.9%	53.3%	53.3%	52.8%	53.5%
Age					
18-34	28.2%	29.3%	34.5%	35.3%	33.7%
35-44	13.8%	11.4%	17.0%	17.1%	18.3%
45-54	17.3%	19.0%	22.4%	21.7%	22.4%
55-64	17.6%	20.7%	13.7%	13.6%	15.4%
65+	23.1%	19.6%	12.4%	12.2%	10.2%
Household Income					
Under \$40,000	15.5%	14.1%	12.1%	13.9%	13.3%
\$40,000-\$59,999	12.4%	12.4%	11.4%	11.8%	12.9%
\$60,000-\$99,999	29.8%	25.1%	29.7%	27.0%	27.2%
\$100,000 or more	30.5%	35.9%	37.1%	38.0%	36.1%
Not stated	11.9%	12.6%	9.7%	9.3%	10.4%
Education					
Less than Secondary	4.2%	4.9%	4.5%	3.7%	4.6%
Completed Secondary	27.1%	18.0%	22.6%	18.9%	20.2%
Some Post Secondary	12.3%	16.4%	13.4%	13.3%	12.1%
Completed Post Secondary	55.4%	59.6%	58.7%	63.2%	62.6%
Not stated	0.9%	1.1%	0.7%	0.8%	0.6%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes Canadians who have taken at least one trip in the past two years to British Columbia that included either an organized or guided group tour or self-guided tour. All travel categories include trips of one or more nights. Single location refers to trips where the traveller spent one or more nights in a single location (for example, casino, spa, etc.). Multiple location refers to trips where the tour included stops at different places for one or more nights. Same-day tour activities refers to tours where all touring activities occurred on a single day.

Note: Cells with values displayed in red are based on small sample sizes (i.e. less than 50) and should be interpreted with caution.

DEMOGRAPHICS BY SPECIFIC TOURING ACTIVITY – AMERICAN PLEASURE TRAVELLERS WHO HAVE TRAVELLED TO BRITISH COLUMBIA

- The activity profile American touring travellers was similar to the profile of Canadian touring travellers with a few notable exceptions between types of touring traveller.
- A greater proportion of US guided tour travellers who went on an tour to a single location were female (52%); all other groups had slightly more males than females (see Table 3).
- US touring travellers were older than their Canadian counterparts. This was true of all touring activities, especially guided trips where 36% of those taking a guided tour to a single location and 37% of those taking a guided tour to multiple locations were age 65 or over.
- All touring types (both guided and self) were similar in terms of household income and level of educational attainment.

Table 3: Demographics by specific tour activity types for travellers from the US

Demographics	Guided			Self	
	Single location	Multiple locations	Same-day	Multiple locations	Same-day
Total	1,059,266	1,713,487	2,851,204	1,670,037	2,445,763
Unweighted Numbers	288	472	798	492	760
Gender					
Male	47.8%	52.4%	50.6%	51.5%	53.8%
Female	52.2%	47.6%	49.4%	48.5%	46.2%
Age					
18-34	13.6%	12.8%	18.8%	15.7%	20.3%
35-44	7.8%	9.8%	10.6%	14.4%	13.1%
45-54	18.2%	17.9%	20.7%	20.6%	22.1%
55-64	24.2%	22.4%	23.7%	23.3%	22.0%
65 +	36.1%	37.1%	26.2%	26.0%	22.5%
Household Income					
Under \$40,000	6.5%	11.0%	8.1%	10.6%	9.7%
\$40,000-\$59,999	15.7%	13.7%	14.2%	14.7%	12.2%
\$60,000-\$99,999	28.9%	27.4%	26.0%	23.4%	26.7%
\$100,000 or more	32.1%	32.7%	39.5%	40.8%	40.6%
Don't Know/Not Stated	16.9%	15.3%	12.2%	10.4%	10.8%
Education					
Less than Secondary	0.7%	0.6%	0.8%	0.4%	1.5%
Completed Secondary	10.0%	10.5%	6.6%	7.9%	5.8%
Some post Secondary	23.3%	21.4%	23.7%	23.8%	21.3%
Completed Post Secondary	64.7%	66.2%	65.8%	63.2%	68.1%
Other	0.5%	0.6%	0.6%	1.0%	0.6%
Not Stated	0.9%	0.8%	2.6%	3.7%	2.7%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes Canadians who have taken at least one trip in the past two years to British Columbia that included either an organized or guided group tour or self-guided tour. All travel categories include trips of one or more nights. Single location refers to trips where the traveler spent one or more nights in a single location (for example, casino, spa, etc.). Multiple locations refer to trips where the tour included stops at different places for one or more nights. Same-day tour activities refer to tours where all touring activities occurred on a single day.

Travel Profile

TRAVEL BY CANADIAN AND US TOURING PLEASURE TRAVELLERS

- The 2006 TAMS Survey estimates that 5.6 million Canadians took at least one overnight pleasure trip in the past two years that included travel within BC. Of these travellers, 37% included a guided touring activity and 44% included a self-guided touring activity on at least one overnight trip (to any destination). Among US travellers who have visited BC in the past two years, 54% included guided tours and 44% included self-guided touring activities on at least one trip. As such, American travellers were more likely to take a guided tour than Canadian travellers (see Table 4).
- Those who participated in touring activities were more frequent travellers than other travellers to British Columbia with 65% of Canadians who included guided tours and 68% of Canadians who included self-tours making five or more trips in the past two years. For US travellers, these proportions were 70% and 74% for guided and self-tours.
- British Columbia was an appealing destination for Canadian touring travellers with 88% of those who took guided tours and 90% of those who took self-guided tours rating the province an 8 or better on a 10 point scale. This is similar to ratings provided by all travellers to BC for whom 88% rated the appeal of BC 8 or higher. Ratings among US travellers were also high, but not as high as those provided by Canadians with 75% of this guided tour travellers and 78% of self-tour travellers providing an 8 out of 10 or higher rating. Again, this was also similar to the ratings provided by all American travellers who had visited British Columbia (76%).

- Touring travellers in both Canada and the US were more likely than the average tourist to have made trips in summer as well as in winter. This was especially evident for American touring travellers with 82% of organized or guided tour travellers and 85% of self-guided touring travellers taking trips in winter months.

Table 4: Travel profile of Canadians and Americans who participated in touring activities

	Canada			US		
	All Travellers who Visited BC	Guided	Self	All Travellers who visited BC	Guided	Self
Total	5,651,177	2,083,554	2,460,858	7,025,878	3,792,948	3,102,416
Unweighted Numbers	7,315	2,745	3,139	2,196	1,068	951
Total number of out-of-town pleasure trips taken in past two years						
One	6.9%	3.4%	5.1%	3.3%	2.1%	2.8%
Two	11.8%	9.1%	7.7%	8.7%	7.4%	4.5%
Three	11.9%	10.0%	8.5%	9.5%	7.9%	7.3%
Four	11.5%	12.7%	10.4%	11.7%	12.0%	10.9%
Five Or More	57.9%	64.7%	68.4%	65.4%	69.5%	73.8%
Not Stated	0.0%	0.0%	0.0%	1.3%	1.0%	0.7%
Appeal Of British Columbia – Rated on a scale of 1 to 10						
8 to 10	87.5%	88.1%	89.8%	75.7%	75.3%	78.0%
4 to 7	9.6%	9.9%	9.1%	18.2%	19.2%	17.4%
1 to 3	1.1%	0.9%	0.3%	2.6%	2.1%	3.1%
Don't Know	0.6%	0.2%	0.0%	0.0%	0.00%	0.0%
Not Stated	1.2%	0.9%	0.7%	1.2%	1.7%	0.5%
Average 1-10	9.0	9.0	9.1	8.5	8.5	8.5
Season travelled						
Summer	89.9%	93.0%	92.9%	87.7%	89.0%	89.1%
Winter	71.0%	77.8%	77.5%	77.4%	82.2%	84.5%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes Canadians who have taken at least one trip in the past two years to British Columbia that included either an organized or guided group tour or self-guided tour. All travel categories include trips of one or more nights.

OTHER DESTINATIONS VISITED

- Just over one-third (36%) of all Canadian guided-tour travellers included at least one trip to BC in the past two years; a similar proportion (37%) of all Canadian self-tour travellers included at least one BC trip. Of the 43 million US travellers whose trips included guided touring activities, 9% took at least one trip to British Columbia; 8% of US self-touring travellers visited BC.
- The majority of 3.8 million BC touring travellers took trips within the province (89% of BC guided tour travellers and 91% of self-touring travellers).
- Canadian touring travellers who visited BC were more likely to have also made a trip to the US than the average Canadian touring traveller.
- Canadian touring travellers to BC were also more likely to have visited Alberta, but not Ontario, Quebec, or the Atlantic provinces.
- Almost all the US travellers whose trips included guided touring or self-touring activities took at least one trip within the US in the past two years (99% each).
- Mexico and other Caribbean destinations were also popular with American travellers. US touring travellers who visited BC were more likely to have visited Mexico and/or the Caribbean than the average US touring traveller (49% compared to 38% for guided touring travellers and 45% compared to 30% for self-touring travellers respectively).

OTHER ACTIVITIES (OUTDOOR AND CULTURAL) PARTICIPATED IN

- Touring travellers from all origins who made trips to BC were similar in terms of other outdoor and cultural activities they participated in. For both guided and self-guided touring travellers in these groups, top other activities also included strolling a city, visiting historic sites and buildings, and viewing natural wonders (see Table 5).
- Touring travellers from the US (who participated in both self and guided tours) were more likely to include visits to historic sites and buildings, and natural wonders on their travel plans compared to travellers from Canada and BC.

Table 5: Other outdoor and cultural activities participated in by touring travellers

Activities	BC		Canada		US	
	Guided	Self	Guided	Self	Guided	Self
City stroll	64.4%	69.3%	64.1%	66.0%	62.5%	68.8%
Historic site/buildings	57.3%	55.7%	55.1%	54.6%	61.3%	66.4%
Other historic sites/buildings	50.4%	49.0%	44.6%	44.8%	53.5%	60.8%
Natural wonders	37.4%	39.7%	43.3%	44.7%	54.1%	59.6%
Visiting national or provincial park	54.7%	53.3%	49.7%	51.6%	51.8%	58.1%
Museum - History/heritage	44.0%	44.6%	41.7%	41.0%	46.5%	48.5%
Art galleries	35.5%	36.6%	35.1%	35.2%	37.4%	43.6%
Hiking - Same day excursion	42.5%	45.1%	39.6%	43.0%	34.9%	43.1%
Wildlife viewing - Land based animals	20.2%	21.9%	23.1%	24.4%	37.1%	42.6%
Sunbathing	56.2%	54.6%	56.0%	54.6%	40.5%	41.1%
Farmers' markets	37.6%	39.5%	30.5%	32.3%	35.9%	40.6%
Whale/marine viewing	28.7%	25.3%	24.7%	23.9%	37.4%	40.1%
Botanical gardens	25.7%	26.0%	27.2%	28.7%	38.0%	39.7%
Swimming in oceans	47.7%	43.1%	47.3%	43.6%	36.2%	37.1%
Swimming in lakes	40.9%	41.5%	43.5%	46.0%	18.1%	21.9%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes Canadians who have taken at least one trip in the past two years to British Columbia that included either an organized or guided group tour or self-guided tour. All travel categories include trips of one or more nights.

International Travel Survey

- The 2007 International Travel Survey (ITS) asked overseas travellers if anyone in their travel party had participated in a sightseeing activity while travelling. Overall, 88% of those who had spent at least one night in British Columbia as part of a leisure trip indicated that sightseeing was an activity of their trip.

Trends within the Touring Sector

- The number of customized tour packages sold through United States Tour Operators Association members increased 14% between 2002 and 2005²; however, recent economic uncertainty may affect customers' tendency to travel especially to destinations that are farther from home or on longer-length trips. Only 6% of Americans surveyed in 2008 said that they were likely to take a vacation package or tour to save money on travel costs³.
- Key issues identified by tour operators as detriments to the touring sector include enhanced security at border crossings, economic uncertainty, and higher gas prices, which could especially impact travellers who prefer driving tours⁴.

² Top Ten Travel and Tourism Trends for 2006; Randall Travel Marketing. Available at [http://www.rtmnet.com/Portals/1/2006%20Top%20Ten%20Travel%20and%20Tourism%20Trends%20\(brief\).pdf](http://www.rtmnet.com/Portals/1/2006%20Top%20Ten%20Travel%20and%20Tourism%20Trends%20(brief).pdf)

³ "Economy affects vacation decisions says USTOA survey" Travel Daily News, Wed. Aug 6, 2008. Available at http://www.traveldailynews.com/pages/show_page/26686.

⁴ Travel Exclusive: Key Trends for the Travel Industry September-October 2008, Report by The Canadian Tourism Research Institute October 2008, Conference Board of Canada available at <http://sso.conferenceboard.ca/e-Library/LayoutAbstract.asp?DID=2752>

- Although the economic downturn and rising gas prices affected the length of trips planned and the destinations, 75% of American survey respondents indicated that they were somewhat or very likely to take a road trip in the summer of 2008 with an average expected trip length of 5 days⁵.
- Nearly one quarter (24%) of international travellers worldwide are classified as youth/ student travellers. The most common reasons for youth/students to travel in groups are for educational or performance purposes⁶.
- Approximately 7% of the Canadian population are RV owners⁷. According to the Recreational Vehicle Industry Association, one in every ten American vehicle owning households in the 50 to 64 year age group own an RV. The number of baby boomers entering retirement years combined with faster growth among those aged 18-34 provide indicators of strong growth in the RV touring segment. The number of American households who own RV's has climbed 15% since 2001.⁸
- Other touring sector segments include bike tours, garden tours, and motor coach tours. Biking vacations in the United States attracted over 27 million travellers between 2003 and 2008; about half of these were between the ages of 18-34 and 25% have a household income of \$75,000 or more. Approximately 20% of U.S. residents have gone on gardening vacations; with 29% have attended a garden tour⁹. Motor coach tours have been identified as a 'green' alternative to individual touring¹⁰.

Economic Impact

The economic impact of self-guided touring is difficult to determine. Similarly, very little data on tour package sales is presently reported. Data on RV and motor coach travel are, however, more readily available.

- There are an estimated 3,000 motor coaches in Canada. A total of 295 companies employ 15,000 workers, and more coaches cross the border from the United States. It is estimated that the economic impact of one motor coach tour contributes between \$7,000 and \$14,000 for an overnight trip.¹¹
- American RVers and campers spent \$3.8 billion in local communities between May and August of 2004¹². RV rentals represent a \$350 million industry¹³.
- There are over 1 million sites available in 8,000 commercial RV parks and campsites in the United States; between May and August of 2004 these sites had an average occupancy rate of 47% (58,686,804 occupied site nights) with average spending per site at \$65 a night¹⁴.
- Despite the rise in gas prices during the period, RV sales and rentals continued to show strong increases; in 2003 retail sales equalled \$12 billion; sales increased 15.2% in the first five months of 2004 compared to the same time the year before¹⁵.

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⁵ 2008 Great American Road Trip Survey, Rand McNally

⁶ See (2) above

⁷ "A glance at the changing trends in the RV Market segment." Suzanne Macguire, Ezine Articles, April 20, 2007

⁸ RV Business Indicators, October 2008. Available at http://www.rvia.org/AM/customsource/INCL_BusinessIndicators.cfm?Section=Business_Indicators

⁹ 2008 Domestic Travel 'Fast Facts' – Travel Trends from A to Z, Travel Industry Association. Available at http://www.tia.org/pressmedia/domestic_a_to_z.html

¹⁰ 2008 Motor Coach Canada Fast Facts. Available at <http://www.buses.org/node/604>

¹¹ See (10) previous page.

¹² "National Survey indicates RVers and Campers Spend Billions of Dollars in Local Communities." Air Highways Magazine, August 30, 2004. Available at <http://rv.net/output.cfm?ID=866107>.

¹³ See (2) Previous page.

¹⁴ See (12) previous page.

¹⁵ See (12) previous page.