

CANADIAN TRAVEL MARKET

Skating While on Trips Of One or More Nights

A Profile Report

October 27, 2007

Prepared by Lang Research Inc. on behalf of:

Ontario Ministry of Tourism, Ontario Tourism Marketing Partnership Corporation, Quebec Ministry of Tourism, Travel Manitoba, Canadian Tourism Commission, Tourism Saskatchewan, Atlantic Canada Tourism Partnership, Alberta Tourism, Parks, Recreation and Culture, Department of Canadian Heritage, Tourism British Columbia, Parks Canada Agency, Government of Yukon, Government of Northwest Territories



Skating While on Trips

Executive Summary

Over the last two years, 8.9% (2,204,750) of adult Canadians went skating while on an out-of-town, overnight trip of one or more nights. Skating was the 11th most common outdoor activity undertaken by Canadian Pleasure Travelers in the past two years. More adult Canadians went ice skating on a trip (7.7%) than went in-line skating or rollerblading (2.3%). Of those who went skating, only 20.1% (444,037) stated that this was the main reason for taking a trip. This suggests that skating is typically just one of several activities undertaken on trips and generally not the main reason for travel.

Skaters are the second youngest of the 21 outdoor activity types with Young Singles and Young Couples over-represented as well as Young Families and Mature Families. Relative to the average Canadian Pleasure Traveler, Skaters have somewhat above-average levels of education (34.6% have a university education) and household incomes (\$78,625). They are over-represented in Quebec and Alberta.

Relative to the other outdoor activity types, the travel patterns of Skaters are not particularly distinctive. They were the 12th most likely to have taken a trip within their own province or region (93.2%), the 8th most likely to have traveled to an adjacent province or region (58.8%) and the 11th most likely to have visited a non-adjacent province or region (57.7%) in the last two years. In terms of out-of-country travel, Skaters were the 12th most likely to have visited the United States (57.7%), 11th most likely to have visited the Caribbean (18.6%) and 18th most likely to have traveled to Mexico (12.5%).

Relative to the average Canadian Pleasure Traveler, Skaters were very active in outdoor activities while on trips, and especially strenuous winter activities (e.g., downhill skiing & snowboarding, cross-country skiing and snowshoeing), summer activities (e.g., cycling, horseback riding) and sports (e.g., team sports, individual sports and games). Skaters were also more likely than average to attend culture and entertainment activities while traveling, including educational activities (e.g., theme parks & exhibits, participatory historical activities) and sporting events (e.g., professional sports events, amateur tournaments). Skaters frequently take tours (e.g., wilderness tours) while on trips and most often stayed at public or private campgrounds, lakeside or riverside resorts. They prefer physically challenging vacations with lots of activity for adults and children that allow them to reconnect with family members and create lasting memories.

Skaters are above-average users of the Internet to plan (73.1%) and book travel (46.5%). They are more likely to obtain travel information from television programs and advertising, newspaper / magazine articles and advertising, travel guide books and official tourism agencies (e.g., guides or brochures, visitor information centres).

Travel Activity and Motivation Survey (TAMS)

The TAMS survey examines the recreational activities and travel habits of Canadians and Americans. The survey examines out-of-town, overnight travel behaviour of one or more nights over the past two years and provides detailed information on Travelers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

TAMS represents a comprehensive assessment of travel behaviour and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada. In particular, TAMS was designed to:

- Identify existing and potential tourism markets;
- Measure the likelihood of these tourism markets being attracted to vacation experiences in Canada;
- Create packaging opportunities for each of these markets;
- Determine how to reach these markets (i.e., in terms of media strategies); and
- Provide information on how to fine-tune and target existing marketing campaigns.

TAMS was sponsored by the following organizations:

Ontario Ministry of Tourism	Quebec Ministry of Tourism
Ontario Tourism Marketing Partnership Corporation	Travel Manitoba
Canadian Tourism Commission	Tourism Saskatchewan
Atlantic Canada Tourism Partnership	Parks Canada Agency
Department of Canadian Heritage	Tourism British Columbia
Alberta Tourism, Parks, Recreation and Culture	Government of Yukon
Government of Northwest Territories	Statistics Canada

The survey was conducted in Canada and the United States between January 2006 and June 2006 and it includes only adults (18 years and over). The reference period for the data is 2004 and 2005.

The Canadian database is used in this current report. This survey was conducted by Statistics Canada. 31,699 completed questionnaires were returned. The data have been weighted to project the results to the Canadian population.

This report profiles persons who went skating while on a trip and compares them with other Canadian Pleasure Travelers (i.e., those who took at least one pleasure trip or vacation in the last two years). This report is part of a series of 44 Activity Reports prepared using the Canadian TAMS database.

Skating While on Trips

Market Incidence

Over the last two years, 8.9% (2,204,750) of adult Canadians went skating while on an out-of-town, overnight trip of one or more nights. Skating was the 11th most common outdoor activity undertaken by Canadian Pleasure Travelers in the past two years. Ice skating (7.7%) was more popular than in-line skating or rollerblading (2.3%) as a trip activity. 1.1% (280,392 adult Canadians) participated in both types of skating activities while on trips during the past two years.

Only 20.1% (444,037) of those who went skating reported that this activity was the main reason for taking a trip in the past two years. This suggests that skating is typically just one of several outdoor activities undertaken on trips and generally not the main reason for travel. Ice skating (21.2%) was more likely than in-line skating or rollerblading (11.0%) to be the main reason for taking a trip in the last two years.

Fig. 1 Incidence of Skating While on Trips¹

	Number of Skaters ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	2,204,750	444,037	18,439,508	24,776,103
Skating (All Activities)	2,204,750	20.1%	12.0%	8.9%
Ice skating	1,915,792	21.2%	10.4%	7.7%
In-line skating or rollerblading	569,349	11.0%	3.1%	2.3%
Participated in both skating activities	280,392	8.8%	1.5%	1.1%

- 1 - "Trips" are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.
- 2 - "Skaters" are defined as individuals who went skating while on an out-of-town, overnight trip of one or more nights during the past two years and who took at least one out-of-town pleasure trip of one or more nights during the past two years. This column reports the number of individuals who participated in the activity on at least one trip during the last two years.
- 3 - This column reports the percent who participated in each activity who stated that the activity was the main reason for taking at least one trip during the past two years.
- 4 - "Pleasure Travelers" are defined as individuals who have taken at least one out-of-town pleasure trip of one or more nights in the last two years. This column reports the percent of Pleasure Travelers who participated in each activity on at least one trip during the last two years.
- 5 - This column reports the percent of the Total Canadian Adult Market who participated in each activity on a trip during the past two years.

Incidence by Region

Skaters are more likely to be live in Quebec and Alberta. They are least likely to live in the Atlantic Provinces and British Columbia.

Fig. 2 Geographic Distribution of Those Who Skate While on Trips

	Total Population	Estimated Number Who Skated on a Trip	Percent of Pleasure Travelers in Region Who Skated on a Trip	Percent of Total Regional Population Who Skated on a Trip
Canada	24,776,103	2,204,750	12.0%	8.9%
Atlantic Provinces	1,822,494	99,668	7.9%	5.5%
Quebec	5,940,869	701,380	16.7%	11.8%
Ontario	9,671,592	772,396	10.8%	8.0%
Manitoba	843,107	54,947	9.2%	6.5%
Saskatchewan	706,325	64,146	11.8%	9.1%
Alberta	2,465,540	286,179	14.3%	11.6%
British Columbia	3,326,176	226,034	8.5%	6.8%

Demographic Profile

Skaters are the second youngest of the 21 outdoor activity types and are over-represented by Young Singles and Young Couples as well as Young Families (with children 12 and under) and Mature Families (with teenaged children). Relative to the average Canadian Pleasure Traveler, Skaters have above-average levels of education (34.6% have a university education) and household incomes (\$78,625). However, compared to other outdoor activity types, their education and incomes are average.

Fig. 3 Demographic Profile of Skaters Relative to All Canadian Pleasure Travelers

		Skaters	Non-Skaters ¹	Pleasure Travelers	Index ²
Attribute	Size of Market	2,204,750	16,234,759	18,439,508	100
Gender	Male	50.1%	48.7%	48.8%	103
	Female	49.9%	51.3%	51.2%	98
Age of Respondent	18 to 24	22.2%	11.5%	12.8%	173
	25 to 34	24.6%	18.6%	19.3%	128
	35 to 44	27.8%	19.6%	20.5%	135
	45 to 54	15.6%	21.0%	20.3%	77
	55 to 64	7.3%	15.1%	14.1%	51
	65 Plus	2.6%	14.3%	12.9%	20
Average Age		36.9	45.6	44.5	N/A
Marital Status	Not married	37.7%	31.5%	32.2%	117
	Married	62.3%	68.5%	67.8%	92
Parental Status	No children under 18	62.4%	72.3%	71.1%	88
	Children under 18	37.6%	27.7%	28.9%	130
Education	High school or less	24.2%	37.9%	36.2%	67
	Some post-secondary	15.4%	10.6%	11.2%	138
	Post-secondary diploma/certificate	25.7%	21.4%	21.9%	118
	University degree	34.6%	30.2%	30.7%	113
Household Income	Under \$20,000	5.6%	5.7%	5.7%	99
	\$20,000 to \$39,999	10.6%	15.0%	14.5%	73
	\$40,000 to \$59,999	14.1%	16.9%	16.5%	85
	\$60,000 to \$79,999	16.8%	15.0%	15.2%	110
	\$80,000 to \$99,999	14.0%	12.0%	12.2%	114
	\$100,000 or more	27.9%	22.1%	22.8%	122
	Not stated	11.1%	13.3%	13.0%	85
Average Household Income		\$78,625	\$72,022	\$72,829	N/A

- 1 - "Non-Skaters" are defined as individuals who took at least one out-of-town, overnight pleasure trip of one or more nights in the last two years but did not go skating on any trip. The numbers of Skaters and Non-Skaters equal the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Skaters in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Skaters are over or under-represented relative to the average Pleasure Traveler. An index of 100 means the percent participating in the activity is the same as that of the average Canadian Pleasure Traveler. Index values over 100 indicate that those participating in the activity are over-represented relative to the average Canadian Pleasure Traveler. Index values less than 100 indicate that those participating in the activity are under-represented relative to the average Canadian Pleasure Traveler.

Travel Activity (During Last Two Years)

Relative to the other outdoor activity types, the travel patterns of Skaters are not especially unique. Skaters were the 12th most likely to have taken a trip within their own province or region (93.2%), the 8th most likely to have traveled to an adjacent province or region (58.8%) and the 11th most likely to have visited a nonadjacent province or region (57.7%) in the last two years. They are over-represented among Quebec travelers although this may reflect the fact that Skaters are over-represented in that province.

In terms of out-of-country travel, Skaters were the 12th most likely to have visited the United States (57.7%), 11th most likely to have visited the Caribbean (18.6%) and 18th most likely to have traveled to Mexico (12.5%). They were the 13th most likely to have taken a trip to an overseas destination in the last two years.

Fig. 4 Percent Traveling Within Canada and to Other Destinations during Past Two Years

	Skaters	Non-Skaters	Pleasure Travelers	Index
Size of Market	2,204,750	16,234,759	18,439,508	100
Canada	98.9%	94.2%	94.8%	104
Took a trip within own province / region	93.2%	84.9%	85.9%	109
Took a trip to an adjacent province / region	58.8%	47.2%	48.6%	121
Took a trip to non-adjacent province / region	37.1%	30.7%	31.4%	118
Newfoundland and Labrador	4.7%	4.2%	4.3%	110
Prince Edward Island	8.6%	7.0%	7.2%	121
New Brunswick	12.7%	11.7%	11.8%	107
Nova Scotia	14.5%	12.5%	12.7%	114
Quebec	53.3%	37.0%	38.9%	137
Ontario	59.8%	52.7%	53.5%	112
Manitoba	9.6%	9.1%	9.2%	105
Saskatchewan	12.6%	11.2%	11.4%	111
Alberta	29.4%	25.4%	25.8%	114
British Columbia	33.5%	30.3%	30.6%	109
Yukon	1.0%	1.0%	1.0%	104
Northwest Territories	0.6%	0.7%	0.7%	98
Nunavut	0.3%	0.3%	0.3%	98
United States	57.7%	49.7%	50.7%	114
Mexico	12.5%	12.4%	12.4%	101
Caribbean	18.6%	15.2%	15.6%	119
All other destinations	26.5%	23.3%	23.6%	112

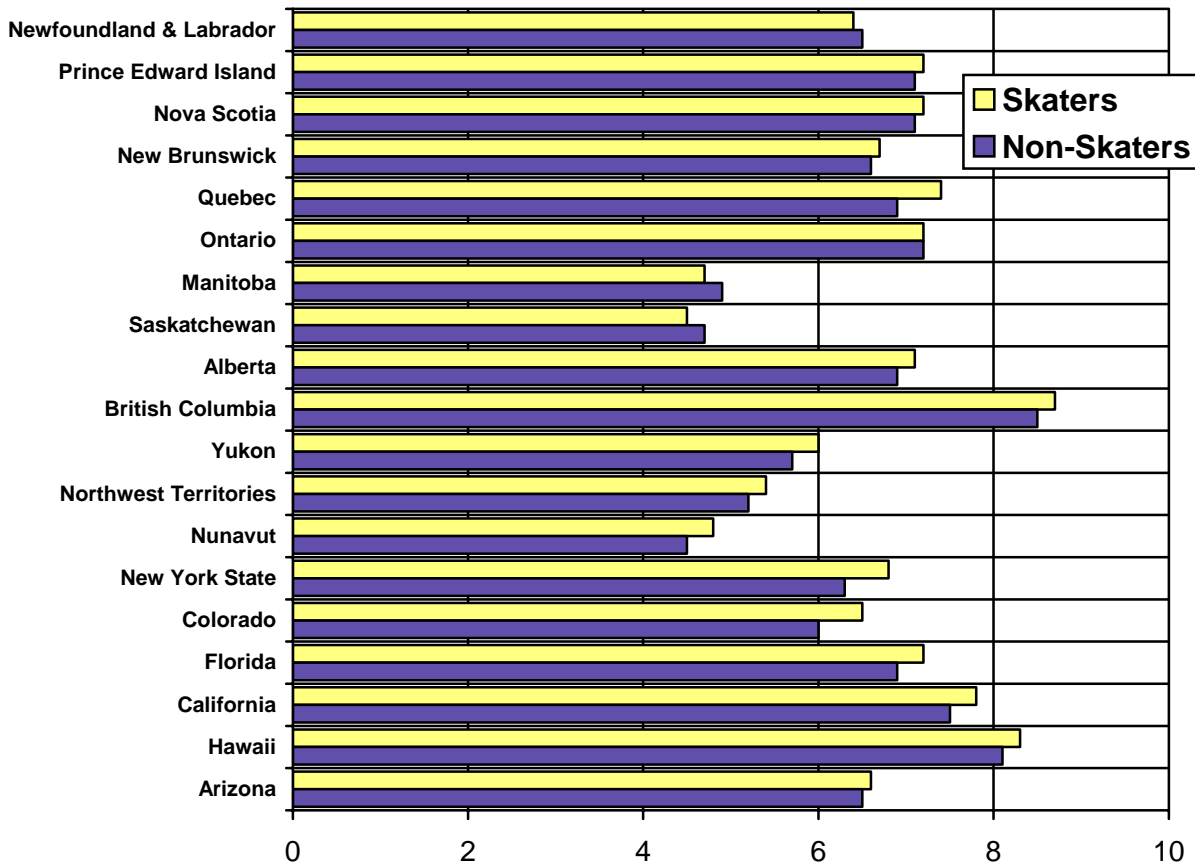
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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

With the exception of Quebec, the appeal ratings of Skaters are comparable to those of Non-Skaters for most Canadian destinations. Skaters rated British Columbia (8.7) as the most appealing among all destinations.

The U.S. reference states were slightly more appealing to Skaters than Non-Skaters with Hawaii (8.3) and California (7.8) receiving the highest appeal ratings by this segment.

Fig. 5 Overall Appeal Ratings of Provinces, Territories and Selected U.S. States on a 10-Point Appeal Rating Scale (Higher Scores=More Appealing)



Other Outdoor Activities Pursued While on Trips

Skaters were much more likely than the average Canadian Pleasure Traveler to have participated in outdoor activities while on trips in the past two years. Skaters frequently participated in ocean activities (e.g., sunbathing, swimming in ocean) and went boating and swimming (e.g., motorboating, swimming in lake) while on trips. Relative to the average Canadian Pleasure Traveler, Skaters were especially likely to have participated in strenuous winter activities (e.g., downhill skiing & snowboarding, cross-country skiing & snowshoeing), summer activities (e.g., exercising & jogging, cycling, sailing & surfing, freshwater scuba and snorkeling, horseback riding) and sports activities (e.g., sports & games, team sports).

Fig. 6 Other Outdoor Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Outdoor Activity)

	Skaters	Non-Skaters	Pleasure Travelers	Index
Size of Market	2,204,750	16,234,759	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	74.9%	45.0%	48.5%	154
Boating & Swimming (e.g., motorboating, swimming in lakes)	74.5%	36.6%	41.1%	181
Hiking, Climbing & Paddling	61.2%	30.4%	34.1%	180
Wildlife Viewing	61.0%	38.6%	41.2%	148
Sports & Games (e.g., tennis, board games)	48.7%	19.2%	22.7%	215
Fishing	41.7%	21.1%	23.6%	177
Downhill Skiing & Snowboarding	38.8%	11.4%	14.6%	265
Exercising & Jogging	37.7%	12.9%	15.9%	238
Cycling	36.2%	10.4%	13.5%	268
Golfing	32.8%	16.3%	18.3%	179
Cross-country Skiing & Snowshoeing	30.8%	6.4%	9.3%	331
Team Sports (e.g., hockey, baseball)	29.7%	8.9%	11.4%	261
Snowmobiling & ATVing	22.5%	9.8%	11.3%	199
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	13.0%	5.4%	6.3%	207
Horseback Riding	10.3%	4.2%	4.9%	211
Wilderness Activities (e.g., wilderness skills course)	7.3%	1.7%	2.4%	306
Freshwater Scuba & Snorkeling	7.2%	2.4%	3.0%	239
Hunting	5.3%	4.6%	4.7%	113
Motorcycling	4.7%	2.8%	3.0%	157
Extreme Air Sports (e.g., parachuting)	2.2%	1.0%	1.1%	195

Outdoor Activities Pursued in a Typical Year

Skaters are also very active in outdoor activities while not traveling. In addition to ice skating, Skaters frequently went swimming, cycling, hiking, camping, exercised at home or at a fitness club and went on day outings to local parks. Relative to the average Canadian Pleasure Traveler, Skaters were two to three times more likely to participate in 'board & blade' activities (e.g., rollerblading, snowboarding, skateboarding), downhill skiing, and cross-country skiing. They were also much more likely to participate in team sports and racquet sports and to have gone jogging, canoeing or kayaking and horseback riding while not traveling.

Fig. 7 Outdoor Activities Pursued in a Typical Year

	Skaters	Non-Skaters	Pleasure Travelers	Index
Size of Market	2,204,750	16,234,759	18,439,508	100
Day outing to a park	77.0%	65.5%	66.9%	115
Swimming	76.6%	58.1%	60.3%	127
Cycling	70.4%	40.8%	44.3%	159
Ice-skating	70.4%	22.8%	28.5%	247
Exercising at home or at a fitness club	69.2%	59.9%	61.0%	114
Hiking	66.9%	46.3%	48.8%	137
Picnicking	62.9%	51.7%	53.1%	119
Gardening	59.8%	59.8%	59.8%	100
Camping	54.8%	36.4%	38.6%	142
Playing team sports	42.1%	20.3%	22.9%	184
Rollerblading	40.2%	10.9%	14.4%	280
Jogging	39.2%	22.0%	24.1%	163
Golfing	38.3%	28.1%	29.4%	131
Fishing	35.9%	28.4%	29.3%	123
Playing racquet sports (e.g., tennis or badminton)	33.5%	17.2%	19.1%	175
Downhill skiing	31.8%	14.1%	16.2%	196
Sailing or other boating	31.7%	22.3%	23.4%	135
Canoeing or kayaking	31.4%	14.9%	16.9%	186
Cross-country skiing	23.9%	10.9%	12.5%	192
Riding an all-terrain vehicle (ATV)	18.0%	13.8%	14.3%	126
Snowboarding	12.7%	4.0%	5.0%	252
Snowmobiling	12.3%	9.4%	9.8%	125
Horseback riding	11.7%	6.2%	6.8%	171
Hunting	8.6%	7.6%	7.7%	112
Skateboarding	4.1%	1.2%	1.6%	257

Culture and Entertainment Activities Pursued While on Trips

Skaters were also very active in culture and entertainment pursuits while on trips. Most went shopping and dining, visited historical sites, museums and art galleries, visited theme parks and exhibits and attended fairs and festivals while on trips. Relative to the typical Canadian Pleasure Traveler, Skaters were especially likely to attend sporting events (e.g., professional sporting events, amateur tournaments, national & international sporting events), visit comedy festivals and clubs, take part in participatory historical activities and attend literary and film festivals while on trips.

Fig. 8 Culture and Entertainment Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Culture & Entertainment Activity)

	Skaters	Non-Skaters	Pleasure Travelers	Index
Size of Market	2,204,750	16,234,759	18,439,508	100
Shopping & Dining	90.9%	81.8%	82.9%	110
Historical Sites, Museums & Art Galleries	69.6%	56.8%	58.3%	119
Theme Parks & Exhibits	63.5%	35.9%	39.2%	162
Fairs & Festivals	59.9%	34.7%	37.7%	159
Musical Concerts, Festivals & Attractions	53.6%	29.9%	32.7%	164
Science & Technology Exhibits	39.4%	20.9%	23.1%	170
Wine, Beer & Food Tastings	34.7%	22.3%	23.8%	146
Casinos	32.9%	25.0%	25.9%	127
Professional Sporting Events	31.0%	13.6%	15.7%	198
Live Theatre	29.9%	19.9%	21.1%	142
Agro-Tourism	28.3%	14.0%	15.7%	181
Garden Theme Attractions	27.1%	16.3%	17.6%	154
Amateur Tournaments	24.8%	10.0%	11.8%	210
Comedy Festivals & Clubs	21.6%	8.6%	10.1%	213
Aboriginal Cultural Experiences	18.8%	10.6%	11.6%	162
High Art Performances	17.6%	10.1%	11.0%	160
Spas	17.4%	9.0%	10.0%	174
Participatory Historical Activities	13.6%	5.7%	6.7%	204
Equestrian & Western Events	12.0%	5.9%	6.7%	180
National & International Sporting Events	6.1%	2.8%	3.2%	191
Literary & Film Festivals	5.6%	2.2%	2.6%	217

Culture and Entertainment Activities Pursued in a Typical Year

Skaters are highly active in a wide variety of local cultural and entertainment pursuits. They frequently dine in local restaurants, visit local festivals and fairs and attend local amateur sporting events. Relative to the average Canadian Pleasure Traveler, Skaters were especially likely to attend local rock and jazz music performances (e.g., bars with live pop or rock bands, rock music concerts, jazz clubs), local sporting events (e.g., professional sporting, amateur sporting events) and local amusement or theme parks.

Fig. 9 Culture and Entertainment Activities Pursued in a Typical Year

	Skaters	Non-Skaters	Pleasure Travelers	Index
Size of Market	2,204,750	16,234,759	18,439,508	100
Going out to eat in restaurants	93.9%	91.2%	91.5%	103
Going to festivals or fairs	70.3%	60.2%	61.4%	115
Going to amateur sporting events	54.9%	40.2%	42.0%	131
Going to pick-your-own farms or farmers' market	46.4%	40.3%	41.0%	113
Going to professional sporting events	44.9%	30.3%	32.1%	140
Going to bars with live pop or rock bands	44.2%	25.5%	27.7%	160
Going to historic sites or heritage buildings	42.2%	38.9%	39.3%	107
Going to amusement or theme parks	42.2%	27.1%	28.9%	146
Going dancing	39.7%	28.5%	29.9%	133
Going to zoos or aquariums	39.4%	29.2%	30.4%	130
Going to art galleries or art shows	36.6%	31.1%	31.8%	115
Going to museums	36.3%	32.2%	32.7%	111
Going to rock music concerts	35.4%	20.7%	22.4%	158
Going to live theatre	34.7%	34.8%	34.8%	100
Going to botanical gardens	26.8%	25.2%	25.4%	105
Going to day spas	19.6%	13.0%	13.8%	142
Going to gamble in casinos	19.1%	18.0%	18.1%	106
Going to classical music concerts	16.9%	16.4%	16.5%	103
Staying overnight in a hotel or B&B in own city	12.0%	9.6%	9.9%	122
Going to jazz clubs	11.4%	7.0%	7.5%	151
Going to rodeos	10.6%	6.9%	7.3%	145
Going to the ballet	7.6%	7.2%	7.3%	104
Going to the opera	5.8%	6.7%	6.6%	87

Accommodation Stayed In While on a Trip

Skaters were most likely to have stayed in public or private campgrounds in the past two years. They also frequently stayed at lakeside or riverside resorts and seaside resorts. Relative to the average Canadian Pleasure Traveler, Skaters were especially more likely to have stayed at a ski or mountain resort as well as some of the more unusual accommodation types such as wilderness lodges and farm or guest ranches.

Fig. 10 Accommodation Stayed in While on Trips

	Skaters	Non-Skaters	Pleasure Travelers	Index
Size of Market	2,204,750	16,234,759	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	45.6%	23.7%	26.4%	173
Lakeside / Riverside Resort	37.3%	20.3%	22.3%	167
A Private Campground	31.1%	17.1%	18.8%	165
Seaside Resort	28.3%	19.7%	20.7%	136
Ski Resort or Mountain Resort	27.1%	12.2%	13.9%	194
A Camp Site in a Wilderness Setting (Not a Campground)	15.9%	7.6%	8.6%	186
Health Spa	10.9%	5.3%	5.9%	184
Wilderness Lodge You Can Drive to by Car	9.3%	5.1%	5.6%	165
Country Inn or Resort with Gourmet Restaurant	7.2%	4.8%	5.1%	142
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	6.5%	4.2%	4.5%	144
Farm or Guest Ranch	5.9%	2.7%	3.0%	195
Remote or Fly-In Wilderness Lodge	2.5%	1.5%	1.6%	156
On a Houseboat	2.2%	1.3%	1.4%	158
Remote or Fly-In Wilderness Outpost	1.1%	0.5%	0.6%	191
Cooking School	0.7%	0.3%	0.4%	208
Wine Tasting School	0.5%	0.2%	0.3%	207

Tours and Cruises Taken During Past Two Years

Skaters were more likely than the average Canadian Pleasure Traveler to take tours in the past two years. Skaters most often took self-guided sameday tours, city tours and countryside scenic drives. They were also more likely than others to have taken wilderness tours, multi-location guided and self-guided overnight tours, air tours and tours of wineries and factories. Skaters were slightly more likely than average to have taken freshwater cruises, although their participation in ocean cruises (e.g., Caribbean, Alaskan, other cruises) was average or below.

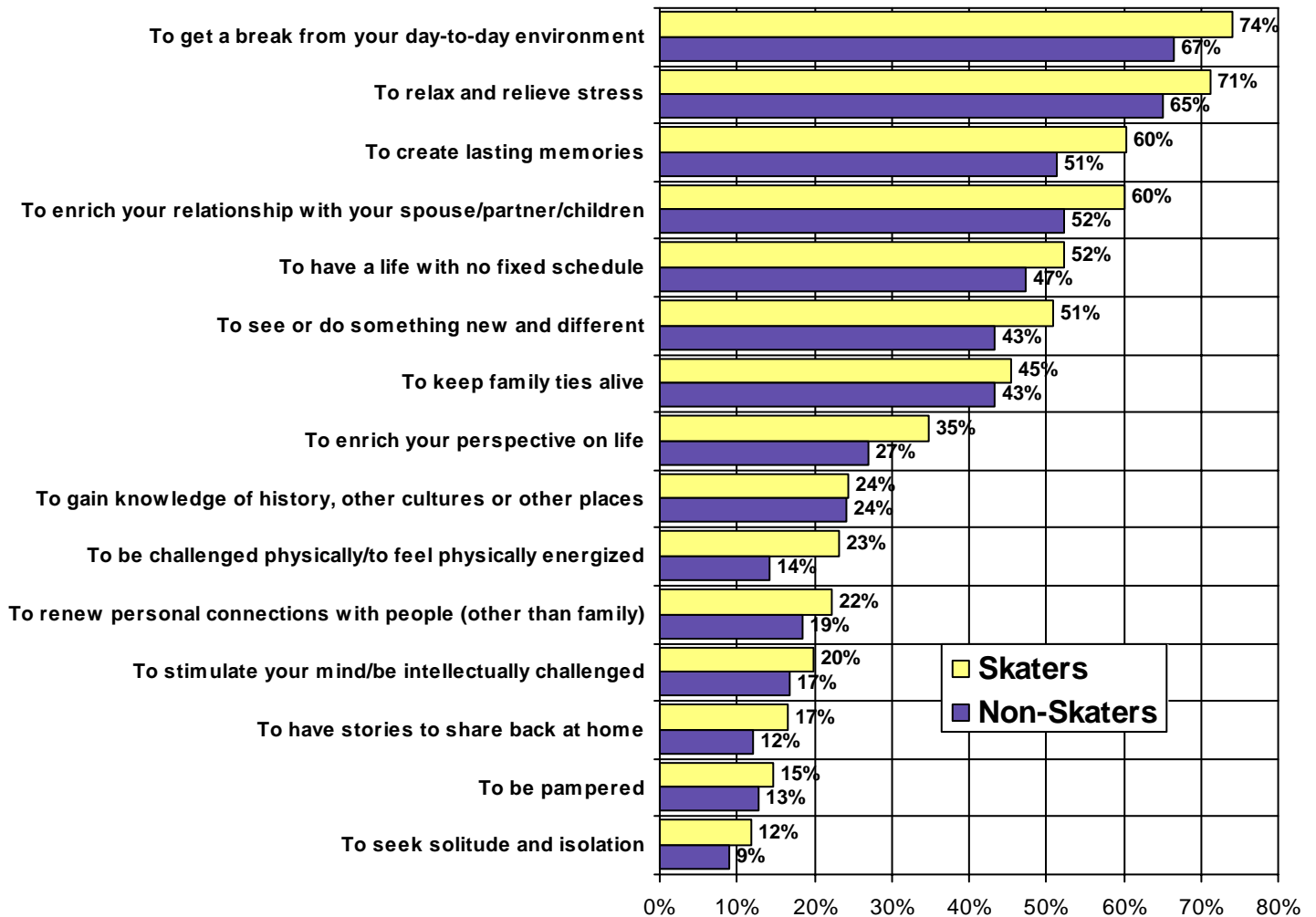
Fig. 11 Tours and Cruises Taken During Past Two Years

	Skaters	Non-Skaters	Pleasure Travelers	Index
Size of Market	2,204,750	16,234,759	18,439,508	100
A self-guided, sameday tour while on an overnight trip	40.2%	27.8%	29.3%	137
Around the city	30.8%	22.4%	23.4%	132
Around the countryside - scenic drives	29.5%	21.5%	22.4%	131
A self-guided, overnight tour where you stayed in different locations	29.0%	16.6%	18.1%	160
An organized, sameday, guided tour while on an overnight trip	28.5%	21.4%	22.2%	128
Wilderness tour	22.7%	11.7%	13.0%	174
On the water (sightseeing cruise)	21.0%	12.0%	13.1%	161
Some other type of tour	13.9%	9.3%	9.8%	141
An organized, overnight, guided tour where you stayed in different locations	13.1%	9.7%	10.1%	130
An organized, overnight guided tour where you stayed in a single location	10.8%	7.4%	7.8%	138
To a casino	8.9%	6.2%	6.5%	136
To a winery	8.6%	5.2%	5.6%	153
Caribbean ocean cruise	5.4%	5.4%	5.4%	100
To a factory	4.7%	2.4%	2.6%	177
Ocean cruise - Other	4.0%	3.2%	3.3%	119
In the air as a pilot or passenger of an airplane or helicopter	3.5%	1.7%	1.9%	184
Cruise on another lake or river	3.3%	2.3%	2.4%	137
Cruise on the St. Lawrence River	2.4%	1.9%	1.9%	121
Some other type of cruise	1.8%	1.6%	1.6%	112
Great Lakes cruise	0.9%	0.8%	0.8%	117
Alaskan ocean cruise	0.9%	1.7%	1.6%	56
Submarine cruise	0.1%	0.1%	0.1%	42

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travelers, the majority of Skaters take vacations to get a break from their day-to-day environment, to relax and relieve stress, to create lasting memories, to enrich family relationships, to live without a fixed schedule and to see or do something new and different. However, each of these common vacation benefits is considered more important to Skaters than to Non-Skaters. Relative to Non-Skaters, Skaters are especially likely to seek physically challenging vacations with lots of activity that allows them to reconnect with family members and create lasting memories.

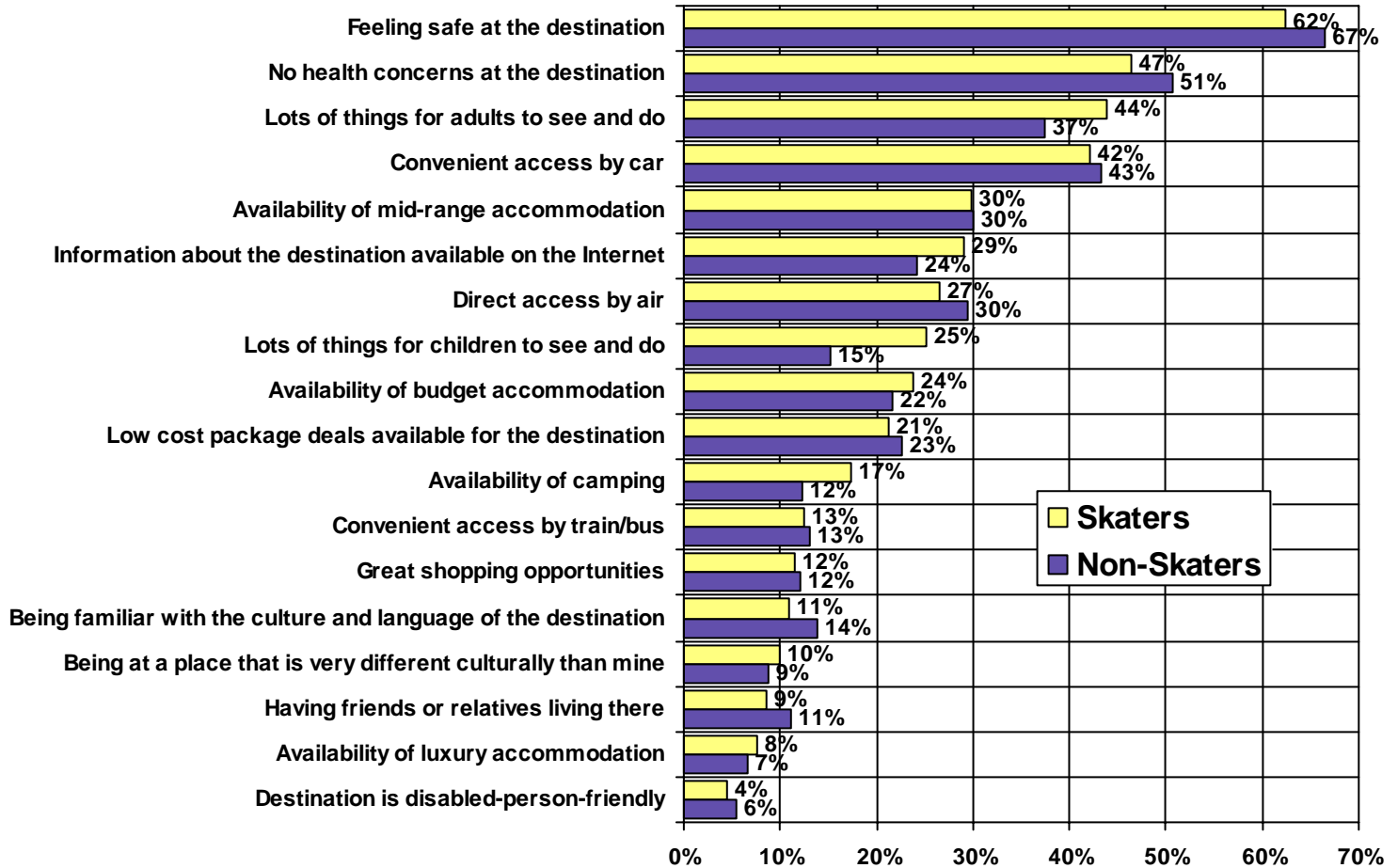
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, Skaters consider it important to feel safe at a destination. However, Skaters are more likely than others to value destinations that offer lots of things for both adults and children to see and do, has camping available and has information readily available on the Internet.

Fig. 13 Importance of Destination Attributes (% Rating Each Attribute as "Highly Important")



How Destinations are Selected

As with most Canadian Pleasure Travelers, Skaters tend to start planning trips with a particular destination in mind. However, Skaters are somewhat more likely than the average Canadian Pleasure Traveler to begin trip planning by considering what specific activities and experiences they would like to have while on vacation. This segment can also be expected to be more responsive to discount summer vacation packages than the typical Canadian Pleasure Traveler.

Fig. 14 How Destinations Are Selected (Summer and Winter Vacations)

	Skaters	Non-Skaters	Pleasure Travelers	Index
Size of Market	2,204,750	16,234,759	18,439,508	100
Summer				
Started with a desired destination in mind	45.8%	48.9%	48.5%	94
Started by considering specific activities wanted to do	16.0%	13.5%	13.8%	116
Started with a certain type of vacation experience in mind	25.8%	23.4%	23.7%	109
Looked for packaged deals - no destination in mind	1.5%	1.3%	1.3%	115
Considered something else first	3.8%	4.4%	4.3%	88
Don't know / Other	7.1%	8.6%	8.4%	84
Winter				
Started with a desired destination in mind	41.8%	49.8%	48.6%	86
Started by considering specific activities wanted to do	22.4%	14.4%	15.6%	144
Started with a certain type of vacation experience in mind	22.2%	18.8%	19.3%	115
Looked for packaged deals - no destination in mind	2.9%	3.3%	3.2%	92
Considered something else first	4.2%	4.7%	4.7%	89
Don't know / Other	6.5%	9.0%	8.6%	75

Trip Planning and Information Sources Consulted

The majority of Skaters were responsible for planning their trips either on their own (44.9%) or with someone else (15.2%). When making vacation plans, Skaters tend to consult a wider variety of information sources than the average Canadian Pleasure Traveler. The majority use the Internet, word-of-mouth and past experiences to plan trips. However, Skaters were particularly more likely to obtain trip planning information from television programs and advertising, newspaper / magazine articles and advertising, travel guide books and official tourism agencies (e.g., guides or brochures, visitor information centres).

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Skaters	Non-Skaters	Pleasure Travelers	Index
Size of Market		2,204,750	16,234,759	18,439,508	100
Who Plans Trips?	Respondent plans trips	44.9%	41.6%	42.0%	107
	Trip planning a shared responsibility	15.2%	16.6%	16.4%	93
	Someone else plans trips	39.8%	41.8%	41.5%	96
Information Sources Consulted	An Internet website	78.5%	63.3%	65.2%	120
	Advice of others / Word-of-mouth	63.5%	49.4%	51.1%	124
	Past experience / Been there before	58.5%	49.2%	50.4%	116
	Maps	38.3%	31.7%	32.6%	118
	A travel agent	36.9%	33.7%	34.1%	108
	Official travel guides or brochures from state / province	36.8%	24.4%	26.0%	142
	Visitor information centres	32.0%	22.2%	23.4%	137
	Articles in newspapers / magazines	29.8%	19.6%	20.9%	143
	An auto club such as CAA	21.7%	17.1%	17.7%	123
	Advertisements in newspapers / magazines	20.5%	13.4%	14.3%	144
	Travel guide books such as Fodor's	20.4%	12.7%	13.6%	150
	Programs on television	12.8%	6.8%	7.5%	171
	Travel information received in the mail	11.5%	8.5%	8.8%	130
	Advertisements on television	10.2%	4.2%	5.0%	204
	Visits to trade, travel or sports shows	6.1%	2.7%	3.1%	197
An electronic newsletter or magazine received by e-mail	5.8%	3.9%	4.2%	139	

Use of the Internet to Plan and Arrange Trips

Relative to the average Canadian Pleasure Traveler, Skaters are more likely to use the Internet to plan (73.1%) and book at least a part of a trip (46.5%). The majority of Skaters use hotel or resort websites and the tourism websites of specific countries, regions or cities. The most commonly booked trip components over the Internet were accommodation and airline tickets, although Skaters were somewhat more likely than others to purchase tickets for rail, bus or boat / ship travel using the Internet.

Fig. 16 Use of the Internet to Plan and Book Travel

		Skaters	Non-Skaters	Pleasure Travelers	Index
Size of Market		2,204,750	16,234,759	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	26.9%	42.7%	40.8%	66
	Uses Internet to plan trips only	26.6%	21.5%	22.1%	120
	Uses Internet to book part of trip	46.5%	35.8%	37.0%	126
Types of Websites Consulted	A website of a hotel or resort	60.0%	56.5%	57.0%	105
	A tourism website of a country / region / city	52.8%	49.3%	49.8%	106
	An airline website	47.6%	46.1%	46.3%	103
	A travel planning/booking website	47.1%	45.5%	45.7%	103
	A website of an attraction	40.3%	33.4%	34.5%	117
	Some other website	33.2%	26.6%	27.6%	120
	A cruise line website	7.9%	8.1%	8.1%	98
Parts of Trips Booked Over The Internet	A motorcoach website	3.0%	2.4%	2.5%	123
	Accommodation	74.6%	68.2%	69.2%	108
	Air tickets	68.9%	69.6%	69.5%	99
	Tickets or fees for specific activities or attractions	28.7%	22.7%	23.6%	122
	Car rental	28.1%	27.0%	27.1%	103
	Tickets for rail, bus or boat / ship fares	18.9%	14.7%	15.3%	123
	A package containing two or more items	17.9%	15.0%	15.4%	116
Other	4.4%	3.8%	3.9%	112	

Media Consumption Habits

Skaters are average users of tourism-related media and were more no more likely to read the travel section of newspapers than the typical Canadian Pleasure Traveler. However, Skaters are more likely than others to read sports magazines (e.g., professional sports, outdoor activities & sports), to watch sports programming on television, to listen to all-sports radio and to visit sports websites and this may be an effective method by which to communicate with this sector. Skaters may also be effectively reached through family and parenting magazines and house and home websites and through contemporary (e.g., Top 40/ Current Hits) radio stations.

Fig. 17 Media Consumption Habits

		Skaters	Non-Skaters	Pleasure Travelers	Index
Size of Market		2,204,750	16,234,759	18,439,508	100
Newspaper Readership	Reads daily newspaper	87.6%	87.2%	87.3%	100
	Reads weekend edition of newspaper	88.0%	87.2%	87.3%	101
	Reads local neighbourhood or community newspapers	63.2%	61.3%	61.5%	103
	Reads other types of newspapers	17.5%	17.1%	17.2%	102
	Frequently or occasionally reads travel section of daily newspaper	47.5%	45.5%	45.7%	104
	Frequently or occasionally reads travel section of weekend newspaper	50.9%	46.9%	47.3%	108
Types of Magazines Read (Top 5 Indexed)	Family and parenting	14.1%	8.1%	8.8%	161
	Professional sports	13.4%	7.8%	8.5%	157
	Outdoor activities / sports	17.8%	12.2%	12.8%	138
	Business, finance and investing	21.7%	15.6%	16.3%	133
	Photography and video	5.4%	3.9%	4.1%	132
Type of Television Programs Watched (Top 5 Indexed)	Late night talk shows	37.5%	26.1%	27.5%	137
	Music / Music video shows / channels	30.5%	24.8%	25.5%	120
	Sports / sports shows	50.8%	42.3%	43.3%	117
	Reality shows (e.g., Canadian Idol)	45.0%	39.1%	39.8%	113
	Situation comedies (e.g., Friends)	56.5%	50.5%	51.3%	110
Type of Radio Programs Listened To (Top 5 Indexed)	Top 40 / Current hits	38.5%	23.4%	25.2%	153
	All sports	16.6%	10.3%	11.1%	150
	Modern rock / Alternative rock	52.6%	35.0%	37.1%	142
	Jazz / Big band	11.3%	8.4%	8.8%	129
	Some other radio program	17.9%	15.3%	15.6%	115
Types of Websites Visited (Top 5 Indexed)	Sports	37.4%	25.2%	26.9%	139
	Magazine sites	19.4%	16.1%	16.6%	117
	House and home	32.8%	27.4%	28.1%	117
	Travel	57.4%	49.5%	50.6%	114
	Entertainment	58.0%	50.5%	51.5%	113

Appendix One: Canadian TAMS 2006 Outdoor Activity Segmentation

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

Appendix Two Canadian TAMS 2006 Culture and Entertainment Segmentation		
Activity Segment	Activities in Segment	
Historical Sites, Museums & Art Galleries	Well-known Historic Sites or Buildings	Well-known Natural Wonders
	Other Historic Sites, Monuments and Buildings	Historical Replicas of Cities or Towns With Historic Re-Enactments
	Strolling Around a City to Observe Buildings and Architecture	Museum - Military /War Museums
	Museum - General History or Heritage Museums	Art Galleries Paleontological/Archaeological Sites
Shopping & Dining	Shop Or Browse - Bookstore or Music Store	Shop Or Browse – Antiques
	Shop Or Browse - Clothing, Shoes and Jewellery	Shop Or Browse - Gourmet Foods in Retail Stores
	Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	Shop Or Browse - Greenhouse or Garden Centre
	Dining - Restaurants Offering Local Ingredients and Recipes	High-End Restaurants with an International Reputation
	Went to Local Outdoor Cafes	Other High-End Restaurants
Aboriginal Cultural Experiences	Aboriginal Cuisine (Tasted or Sampled)	Aboriginal Arts and Crafts Shows
	Aboriginal Heritage Attractions (e.g., Museums, Interpretive Centres)	Aboriginal Cultural Experiences in a Remote or Rural Setting
	Aboriginal Festivals & Events (e.g., Powwows)	Aboriginal Outdoor Adventure and /or Sports
Fairs & Festivals	Farmers' Markets or Country Fairs	Firework Displays
	Carnivals	Ethnic Festivals
	Exhibition or Fairs	Food /Drink Festivals
Science & Technology Exhibits	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
Theme Parks & Exhibits	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Entertainment Farms (e.g., Corn Maze, Petting Zoo)
	Wax Museums	
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	Professional Soccer Games
Live Theatre	Live Theatre	Live Theatre with Dinner
	Theatre Festivals	
Literary & Film Festivals	Literary Festivals or Events	International Film Festivals
Tastings	Went to Wineries for Day Visits and Tasting	Cooking /Wine Tasting Courses
	Went to Breweries for Day Visits and Tasting	Visited Food Processing Plants (e.g., Cheese Factory)
Casinos	Went to a Casino	
Spas	Day Visit to a Health & Wellness Spas while on an Overnight Trip	
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National /Provincial Park
	Curatorial Tours	Archaeological Digs
Equestrian & Western Events	Equine (Horse) Competitions	Western Theme Events (e.g., Rodeos)
	Horse Races	

Appendix Two		
Canadian TAMS 2006 Culture and Entertainment Segmentation		
Agro-Tourism	Dining At A Farm	Harvesting and /or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	
National & International Sporting Events	Curling Bonspiel	National /International Sporting Events such as the Olympic Games
	Professional Figure Skating	
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related
Musical Concerts, Festivals & Attractions	Music Festivals	Musical Attractions
	Jazz Concert	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Rock & Roll/Popular Music Concert	Country & Western Music Concert
Comedy Festivals & Clubs	Comedy Festivals	Stand-up Comedy Clubs & Other Variety Shows