

CANADIAN TRAVEL MARKET

Cycling While on Trips Of One or More Nights

A Profile Report

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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



Cycling While on Trips

Executive Summary

Over the last two years, 10.1% (2,494,384) of adult Canadians went cycling while on an out-of-town, overnight trip of one or more nights. Cycling was the tenth most common outdoor activity pursued by Canadian Pleasure Travelers during that time. Recreational cycling as a sameday excursion (8.3%) was the most popular cycling activity followed by mountain biking (3.0%) and overnight touring (1.0%). Of those who went cycling, 28.4% (708,979) reported that this activity was the main reason for taking at least one trip.

Relative to the average Canadian Pleasure Traveler, Cyclists are more likely to be male (54.9%) and 18 to 44 years of age. Cyclists are over-represented among young couples, young singles and mature families with teenage children. This is a moderately affluent segment with an above-average level of education (38.9% have a university degree – ranked 7th of the 21 outdoor activity types) and above-average household incomes (\$78,827 – ranked 9th of the 21 outdoor activity types). They are over-represented among residents of Quebec, Alberta and British Columbia.

Cyclists were the 3rd most likely to have taken a trip within their own province or region (95.1%) of the 21 outdoor activity types and the 6th most likely to have visited an adjacent province or region (59.5%) in the last two years. In relative terms, they are less frequent out-of-country travelers and were only the 13th most likely of the 21 outdoor activity types to have taken a trip to the Caribbean (17.8%), the 17th most likely to have visited Mexico (13.2%) and the 9th most likely to have visited the United States (58.0%).

Cyclists are quite active in outdoor activities both while traveling and at home. They are especially active in physically strenuous activities such as exercising and jogging, cross-country skiing, downhill skiing and snowboarding, and hiking, climbing and paddling. Cyclists are also more likely to take part in participatory learning activities (e.g., aboriginal cultural experiences, participatory historical activities) and to attend live art performances (e.g., high arts, comedy festivals and clubs, music concerts) while on trips. They tend to stay in public campgrounds, wilderness campsites and ski or mountain resorts. Cyclists tend to seek vacations that offer novelty, intellectual stimulation and physical challenge.

Cyclists are above-average users of the Internet to plan (75.3%) and book travel (48.7%). In fact, they are the 5th most likely segment to purchase trip components online. They are also more likely than others to consult official travel information sources. They can be most effectively targeted through travel-related media as well as magazines and television programs devoted to nature and science, outdoor activities, sports and technology (e.g., photography & video, computers & electronics).

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 cycling 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.

Cycling While on Trips

Market Incidence

Over the last two years, 10.1% (2,494,384) of adult Canadians went cycling while on an out-of-town, overnight trip of one or more nights. Cycling was the tenth most common outdoor activity pursued by Canadian Pleasure Travelers during that time. Recreational cycling as a sameday excursion (8.3%) was the most common type of cycling activity undertaken while on a trip. Mountain biking (3.0%) was the next most popular activity followed by overnight touring (1.0%). 0.3% of adult Canadians (71,616) participated in all three cycling activities when on trips taken during the past two years.

Of those who went cycling while on trips, only 28.4% (708,979 – ranked 14th of the 21 outdoor activity types) reported that cycling was the main reason for taking at least one trip in the past two years. Those who went on an overnight touring trip (69.4%) were much more likely than those who went recreational cycling (25.1%) or mountain biking (24.8%) to report that this activity was the main reason for taking at least one trip over the last two years.

Fig. 1 Incidence of Cycling While on Trips¹

	Number of Cyclists ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	2,494,384	708,979	18,439,508	24,776,103
Cycling (All Activities)	2,494,384	28.4%	13.5%	10.1%
Recreational cycling - same day excursion	2,067,944	25.1%	11.2%	8.3%
Mountain biking	753,489	24.8%	4.1%	3.0%
Overnight touring trip	252,120	69.4%	1.4%	1.0%
Participated in all three cycling activities	71,616	32.0%	0.4%	0.3%

- 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 - "Cyclists" are defined as individuals who went cycling while on an out-of-town, over-night 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

Cyclists are more likely to live in Quebec, Alberta and British Columbia. They are least likely to live in Saskatchewan or the Atlantic Provinces.

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

	Total Population	Estimated Number Who Went Cycling on a Trip	Percent of Pleasure Travelers in Region Who Went Cycling on a Trip	Percent of Total Regional Population Who Went Cycling on a Trip
Canada	24,776,103	2,494,384	13.5%	10.1%
Atlantic Provinces	1,822,494	101,418	8.0%	5.6%
Quebec	5,940,869	730,718	17.4%	12.3%
Ontario	9,671,592	851,230	11.9%	8.8%
Manitoba	843,107	72,430	12.2%	8.6%
Saskatchewan	706,325	39,859	7.4%	5.6%
Alberta	2,465,540	303,529	15.1%	12.3%
British Columbia	3,326,176	395,200	14.8%	11.9%

Demographic Profile

Cyclists are more likely to be male than female. They are younger than the average Canadian Pleasure Traveler with the majority between 18 and 44 years of age. They are over-represented among Young Singles, Young Couples and Mature Families with teenaged children. Cyclists have an above-average level of education (38.9% have a university degree – ranked 7th of the 21 outdoor activity types) and above-average household incomes (\$78,827 – ranked 9th of the 21 outdoor activity types).

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

Attribute	Size of Market	Cyclists	Non-Cyclists ¹	Pleasure Travelers	Index ²
		2,494,384	15,945,125	18,439,508	100
Gender	Male	54.9%	47.9%	48.8%	113
	Female	45.1%	52.1%	51.2%	88
Age of Respondent	18 to 24	15.3%	12.4%	12.8%	119
	25 to 34	21.2%	19.0%	19.3%	110
	35 to 44	25.8%	19.7%	20.5%	126
	45 to 54	21.2%	20.2%	20.3%	104
	55 to 64	12.5%	14.4%	14.1%	88
	65 Plus	4.0%	14.3%	12.9%	31
Average Age		40.6	45.1	44.5	N/A
Marital Status	Not married	34.9%	31.8%	32.2%	108
	Married	65.1%	68.2%	67.8%	96
Parental Status	No children under 18	66.5%	71.8%	71.1%	93
	Children under 18	33.5%	28.2%	28.9%	116
Education	High school or less	25.0%	38.0%	36.2%	69
	Some post-secondary	11.6%	11.1%	11.2%	103
	Post-secondary diploma/certificate	24.5%	21.5%	21.9%	112
	University degree	38.9%	29.4%	30.7%	127
Household Income	Under \$20,000	4.9%	5.9%	5.7%	85
	\$20,000 to \$39,999	11.4%	15.0%	14.5%	79
	\$40,000 to \$59,999	14.8%	16.8%	16.5%	90
	\$60,000 to \$79,999	16.2%	15.1%	15.2%	106
	\$80,000 to \$99,999	13.9%	12.0%	12.2%	114
	\$100,000 or more	28.3%	22.0%	22.8%	124
	Not stated	10.5%	13.4%	13.0%	81
Average Household Income		\$78,827	\$71,859	\$72,829	N/A

- 1 - "Non-Cyclists" 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 cycling on any trip. The number of Cyclists and Non-Cyclists equals the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Cyclist in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Cyclists 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)

Almost all Cyclists (98.6%) took a trip within Canada during the past two years. They were the third most likely of the 21 outdoor activity types to have taken a trip within their own province or region (95.1%), the 6th most likely to have visited an adjacent province or region (59.5%) and the 12th most likely to have taken a trip to a non-adjacent province or region in the past two years.

Cyclists are less frequent out-of-country travelers and were only the 13th most likely of the 21 outdoor activity types to have taken a trip to the Caribbean (17.8%), the 17th most likely to have visited Mexico (13.2%) and the 9th most likely to have visited the United States (58.0%) in the past two years.

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

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market	2,494,384	15,945,125	18,439,508	100
Canada	98.6%	94.2%	94.8%	104
Took a trip within own province / region	95.1%	84.4%	85.9%	111
Took a trip to an adjacent province / region	59.6%	46.8%	48.6%	123
Took a trip to non-adjacent province / region	36.7%	30.6%	31.4%	117
Newfoundland and Labrador	4.0%	4.4%	4.3%	92
Prince Edward Island	8.4%	7.0%	7.2%	117
New Brunswick	13.3%	11.6%	11.8%	113
Nova Scotia	14.5%	12.4%	12.7%	114
Quebec	51.5%	37.0%	38.9%	132
Ontario	58.2%	52.8%	53.5%	109
Manitoba	10.2%	9.0%	9.2%	111
Saskatchewan	12.9%	11.2%	11.4%	113
Alberta	33.5%	24.6%	25.8%	130
British Columbia	39.1%	29.3%	30.6%	128
Yukon	1.8%	0.9%	1.0%	184
Northwest Territories	1.0%	0.6%	0.7%	157
Nunavut	0.4%	0.3%	0.3%	126
United States	58.0%	49.5%	50.7%	115
Mexico	13.2%	12.3%	12.4%	107
Caribbean	17.8%	15.2%	15.6%	114
All other destinations	29.6%	22.7%	23.6%	125

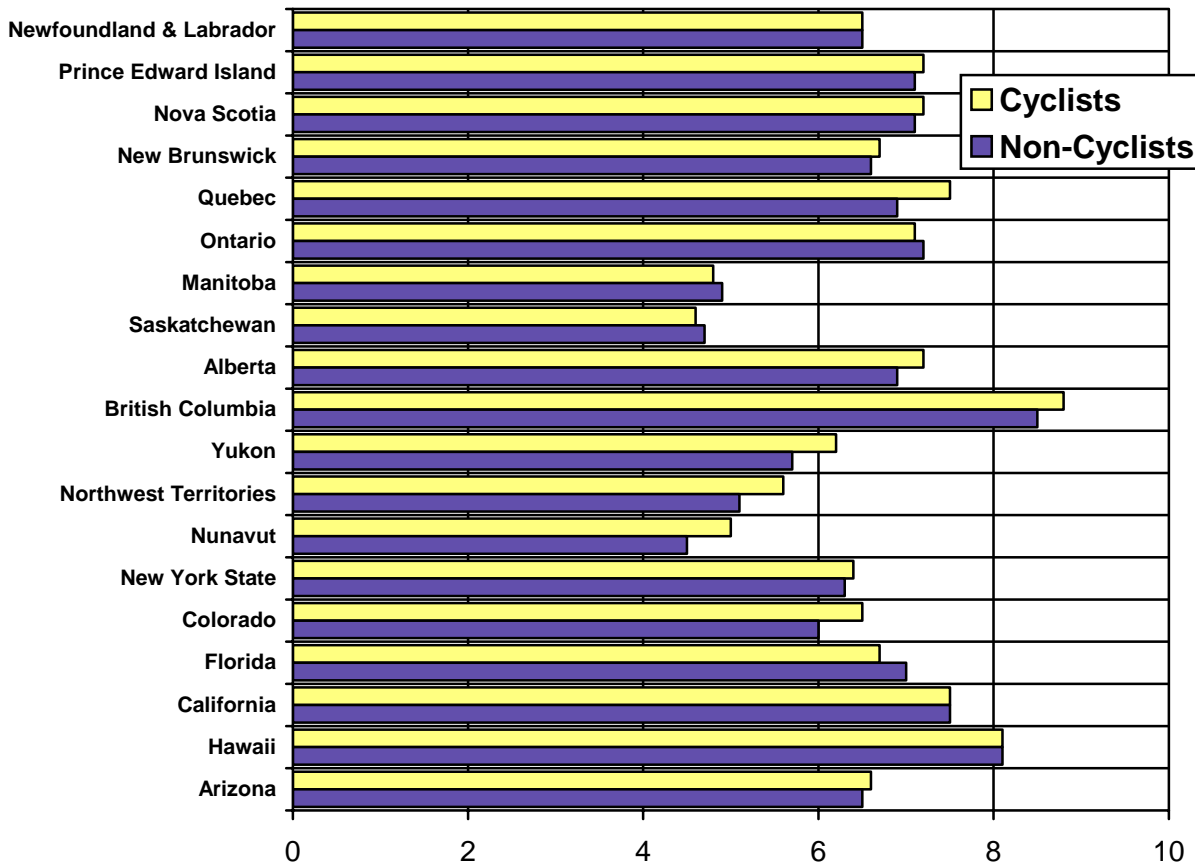
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Cyclists tend to rate many of the Canadian destinations as more appealing than non-cyclists (e.g., British Columbia, Quebec, Alberta, Yukon, Northwest Territories, Nunavut). British Columbia (8.8) was considered the most appealing destination, followed by Quebec (7.5), Alberta (7.2), Nova Scotia (7.2) and Prince Edward Island (7.2).

For the most part, the appeal ratings of the U.S. reference states among Cyclists are comparable to those of Non-Cyclists. However Colorado (6.5) was perceived as more appealing to Cyclists than Non-Cyclists.

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

Cyclists were much more likely than the average Canadian Pleasure Traveler to participate in outdoor activities while on trips. The majority participated in ocean activities (e.g., sunbathing, swimming in ocean), hiking, climbing and paddling, boating and swimming activities (e.g., motorboating, swimming in lake) and wildlife viewing while on trips. Relative to the average Canadian Pleasure Traveler, Cyclists were two to three times more likely to participate in physically strenuous outdoor activities such as hiking, climbing and paddling, exercising and jogging, downhill skiing and snowboarding, cross-country skiing and snowshoeing, sailing and surfing and extreme air sports. On the other hand, they were less likely to have gone hunting in the past two years. The above-average participation in physically challenging outdoor activities reflects the fact that cycling is more frequently undertaken by young, affluent males, which are attributes that tend to be associated with higher levels of strenuous, outdoor activity.

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

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market	2,494,384	15,945,125	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	71.4%	45.0%	48.5%	147
Hiking, Climbing & Paddling	69.5%	28.5%	34.1%	204
Boating & Swimming (e.g., motorboating, swimming in lakes)	68.8%	36.8%	41.1%	167
Wildlife Viewing	66.5%	37.3%	41.2%	161
Sports & Games (e.g., tennis, board games)	41.7%	19.7%	22.7%	184
Exercising & Jogging	37.7%	12.5%	15.9%	238
Fishing	34.7%	21.9%	23.6%	147
Downhill Skiing & Snowboarding	33.7%	11.7%	14.6%	230
Skating (e.g., ice skating, rollerblading)	32.0%	8.8%	12.0%	268
Cross-country Skiing & Snowshoeing	29.7%	6.1%	9.3%	319
Golfing	27.5%	16.9%	18.3%	150
Team Sports (e.g., hockey, baseball)	18.9%	10.2%	11.4%	167
Snowmobiling & ATVing	16.7%	10.5%	11.3%	148
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	13.6%	5.2%	6.3%	215
Horseback Riding	11.4%	3.9%	4.9%	232
Freshwater Scuba & Snorkeling	8.2%	2.2%	3.0%	273
Wilderness Activities (e.g., wilderness skills course)	5.8%	1.8%	2.4%	245
Motorcycling	5.5%	2.6%	3.0%	182
Hunting	4.3%	4.8%	4.7%	91
Extreme Air Sports (e.g., parachuting)	2.9%	0.8%	1.1%	259

Outdoor Activities Pursued in a Typical Year

Cyclists are also quite active in outdoor activities when they do not travel. In addition to going cycling, Cyclists frequently go on day outings to local parks, hike, swim, exercise at home or at a fitness club and go camping while not traveling. Relative to the average Canadian Pleasure Traveler, Cyclists were especially active in physically strenuous activities such as canoeing or kayaking, downhill skiing, cross-country skiing, snowboarding, skateboarding and of course, cycling. They were less likely than average to go hunting and ATVing.

Fig. 7 Outdoor Activities Pursued in a Typical Year

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market	2,494,384	15,945,125	18,439,508	100
Cycling	88.3%	37.4%	44.3%	199
Day outing to a park	79.7%	64.9%	66.9%	119
Hiking	73.6%	44.9%	48.8%	151
Swimming	72.3%	58.4%	60.3%	120
Exercising at home or at a fitness club	67.8%	59.9%	61.0%	111
Gardening	63.9%	59.1%	59.8%	107
Picnicking	63.1%	51.5%	53.1%	119
Camping	55.4%	36.0%	38.6%	143
Ice-skating	43.4%	26.2%	28.5%	152
Jogging	35.4%	22.3%	24.1%	147
Canoeing or kayaking	33.5%	14.3%	16.9%	198
Downhill skiing	32.2%	13.7%	16.2%	199
Golfing	31.7%	29.0%	29.4%	108
Playing racquet sports (e.g., tennis or badminton)	30.9%	17.3%	19.1%	161
Fishing	30.6%	29.1%	29.3%	104
Cross-country skiing	30.0%	9.7%	12.5%	241
Playing team sports	28.3%	22.1%	22.9%	124
Sailing or other boating	27.2%	22.9%	23.4%	116
Rollerblading	23.8%	12.9%	14.4%	166
Riding an all-terrain vehicle (ATV)	12.4%	14.6%	14.3%	87
Snowmobiling	9.5%	9.8%	9.8%	97
Snowboarding	9.1%	4.4%	5.0%	179
Horseback riding	8.8%	6.5%	6.8%	130
Hunting	5.4%	8.1%	7.7%	70
Skateboarding	3.9%	1.2%	1.6%	248

Culture and Entertainment Activities Pursued While on Trips

Cyclists were much more active than the average Canadian Pleasure Traveler in most culture and entertainment activities while on trips in the past two years. While traveling, Cyclists frequently visited historical sites, museums and art galleries, theme parks and exhibits, fairs and festivals and attended musical concerts, festivals and attractions. Relative to the average Canadian Pleasure Traveler, Cyclists were especially likely to take part in participatory learning activities (e.g., aboriginal cultural experiences, participatory historical activities) and to attend live art performances (e.g., high arts, comedy festivals and clubs, music concerts, festivals and attractions) 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)

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market	2,494,384	15,945,125	18,439,508	100
Shopping & Dining	89.4%	81.9%	82.9%	108
Historical Sites, Museums & Art Galleries	74.6%	55.8%	58.3%	128
Theme Parks & Exhibits	57.2%	36.3%	39.2%	146
Fairs & Festivals	56.0%	34.8%	37.7%	149
Musical Concerts, Festivals & Attractions	52.6%	29.6%	32.7%	161
Wine, Beer & Food Tastings	39.6%	21.3%	23.8%	166
Science & Technology Exhibits	38.7%	20.7%	23.1%	167
Live Theatre	30.3%	19.6%	21.1%	144
Garden Theme Attractions	29.8%	15.7%	17.6%	169
Agro-Tourism	28.3%	13.7%	15.7%	181
Casinos	25.9%	25.9%	25.9%	100
Professional Sporting Events	23.9%	14.4%	15.7%	152
Aboriginal Cultural Experiences	20.1%	10.3%	11.6%	173
High Art Performances	19.6%	9.6%	11.0%	179
Amateur Tournaments	19.5%	10.6%	11.8%	165
Comedy Festivals & Clubs	19.0%	8.8%	10.1%	188
Spas	16.7%	9.0%	10.0%	166
Participatory Historical Activities	13.5%	5.6%	6.7%	202
Equestrian & Western Events	10.5%	6.1%	6.7%	158
Literary & Film Festivals	7.0%	1.9%	2.6%	273
National & International Sporting Events	5.1%	2.9%	3.2%	160

Culture and Entertainment Activities Pursued in a Typical Year

Cyclists are also more active than the average Canadian Pleasure Traveler in culture and entertainment pursuits while not traveling. Relative to the average Canadian Pleasure Traveler, Cyclists are especially likely to go to local jazz clubs, rock concerts and bars with live pop or rock bands. They are also more likely to patronize local live arts (e.g., ballet, live theatre), visit local museums and art galleries and visit local day spas. On the other hand, Cyclists are less likely than average to go gambling in a casino.

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

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market	2,494,384	15,945,125	18,439,508	100
Going out to eat in restaurants	93.1%	91.3%	91.5%	102
Going to festivals or fairs	69.3%	60.2%	61.4%	113
Going to historic sites or heritage buildings	47.6%	38.0%	39.3%	121
Going to pick-your-own farms or farmers' market	46.7%	40.1%	41.0%	114
Going to amateur sporting events	46.2%	41.3%	42.0%	110
Going to museums	41.3%	31.4%	32.7%	126
Going to live theatre	40.0%	34.0%	34.8%	115
Going to art galleries or art shows	40.0%	30.5%	31.8%	126
Going to bars with live pop or rock bands	36.3%	26.4%	27.7%	131
Going to zoos or aquariums	36.1%	29.5%	30.4%	119
Going to professional sporting events	35.3%	31.5%	32.1%	110
Going dancing	34.4%	29.1%	29.9%	115
Going to botanical gardens	32.8%	24.2%	25.4%	129
Going to amusement or theme parks	32.8%	28.3%	28.9%	114
Going to rock music concerts	30.1%	21.3%	22.4%	134
Going to classical music concerts	19.7%	16.0%	16.5%	119
Going to day spas	17.0%	13.2%	13.8%	123
Going to gamble in casinos	12.9%	18.9%	18.1%	71
Staying overnight in a hotel or B&B in own city	11.1%	9.7%	9.9%	112
Going to jazz clubs	10.7%	7.0%	7.5%	142
Going to the ballet	9.6%	6.9%	7.3%	131
Going to rodeos	8.4%	7.2%	7.3%	115
Going to the opera	7.4%	6.5%	6.6%	112

Accommodation Stayed In While on a Trip

Cyclists were much more likely than the average Canadian Pleasure Traveler to have stayed in public campgrounds and resorts (e.g., lakeside or riverside resorts, ski or mountain resorts). They were also more likely to have stayed at a campsite in a wilderness setting, health spas and cooking schools than the average Canadian Pleasure Traveler.

Fig. 10 Accommodation Stayed in While on Trips

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market	2,494,384	15,945,125	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	49.8%	22.7%	26.4%	189
Lakeside / Riverside Resort	35.1%	20.3%	22.3%	157
A Private Campground	32.8%	16.6%	18.8%	175
Ski Resort or Mountain Resort	28.0%	11.8%	13.9%	200
Seaside Resort	27.6%	19.7%	20.7%	133
A Camp Site in a Wilderness Setting (Not a Campground)	17.4%	7.2%	8.6%	203
Health Spa	10.8%	5.2%	5.9%	182
Wilderness Lodge You Can Drive to by Car	9.5%	5.0%	5.6%	169
Country Inn or Resort with Gourmet Restaurant	8.5%	4.5%	5.1%	168
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	7.4%	4.0%	4.5%	165
Farm or Guest Ranch	5.4%	2.7%	3.0%	176
Remote or Fly-In Wilderness Lodge	2.7%	1.4%	1.6%	172
On a Houseboat	2.2%	1.2%	1.4%	161
Cooking School	1.0%	0.3%	0.4%	278
Remote or Fly-In Wilderness Outpost	0.6%	0.6%	0.6%	101
Wine Tasting School	0.3%	0.2%	0.3%	132

Tours and Cruises Taken During Past Two Years

Cyclists were much more likely than the average Canadian Pleasure Traveler to have taken tours and cruises in the past two years. Self-guided sameday tours and scenic countryside drives were the most popular tours among Cyclists. They were especially likely to have taken a wilderness tour, tours of wineries or factories and air tours in an airplane or helicopter. Cyclists were also more likely to have taken freshwater cruises (e.g., St. Lawrence River, Great Lakes, other lake or river), but less likely than average to have taken a Caribbean or Alaskan ocean cruise.

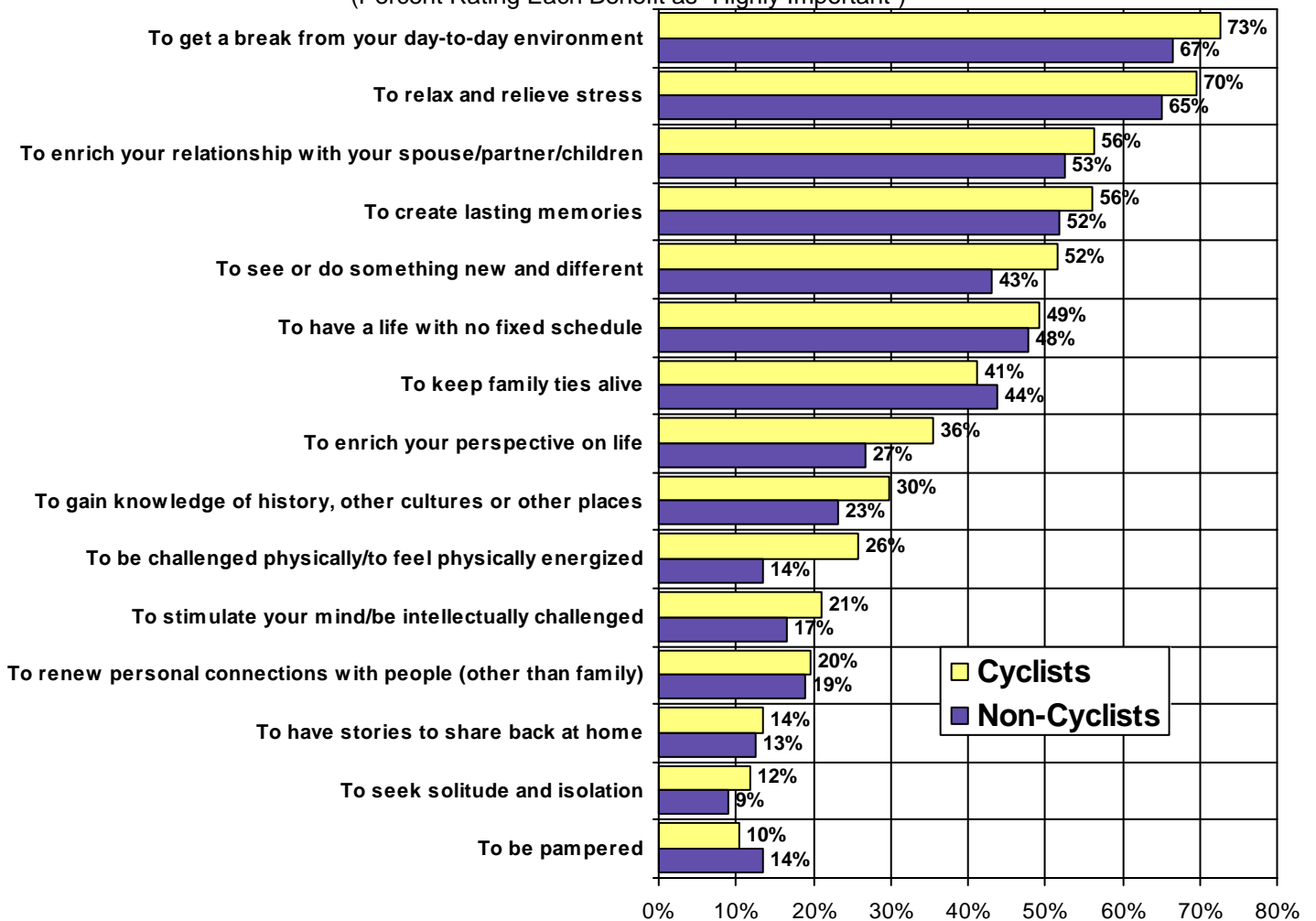
Fig. 11 Tours and Cruises Taken During Past Two Years

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market	2,494,384	15,945,125	18,439,508	100
A self-guided, sameday tour while on an overnight trip	42.2%	27.3%	29.3%	144
Around the countryside - scenic drives	34.7%	20.5%	22.4%	155
Around the city	31.0%	22.2%	23.4%	133
An organized, sameday, guided tour while on an overnight trip	30.9%	20.9%	22.2%	139
A self-guided, overnight tour where you stayed in different locations	28.3%	16.5%	18.1%	156
Wilderness tour	26.3%	10.9%	13.0%	203
On the water (sightseeing cruise)	20.9%	11.9%	13.1%	160
Some other type of tour	15.7%	8.9%	9.8%	159
An organized, overnight, guided tour where you stayed in different locations	14.4%	9.4%	10.1%	143
An organized, overnight, guided tour where you stayed in a single location	11.1%	7.3%	7.8%	142
To a winery	11.1%	4.8%	5.6%	197
To a casino	7.8%	6.3%	6.5%	120
To a factory	5.9%	2.1%	2.6%	223
Caribbean ocean cruise	4.7%	5.5%	5.4%	86
Cruise on another lake or river	3.9%	2.1%	2.4%	164
Ocean cruise – Other	3.6%	3.3%	3.3%	107
In the air as a pilot or passenger of an airplane or helicopter	3.3%	1.7%	1.9%	176
Cruise on the St. Lawrence River	3.3%	1.7%	1.9%	169
Some other type of cruise	2.1%	1.5%	1.6%	130
Alaskan ocean cruise	1.4%	1.7%	1.6%	84
Great Lakes cruise	1.0%	0.8%	0.8%	132
Submarine cruise	0.3%	0.1%	0.1%	227

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travelers, the majority of Cyclists take vacations to get a break from their day-to-day environment, to relax and relieve stress, to enrich family relationships, to create lasting memories and to see or do something new and different. However, each of these common vacation benefits tends to be more important to Cyclists than to Non-Cyclists. Relative to other Canadian Pleasure Travelers, Cyclists are also more likely to prefer vacations that are intellectually challenging (e.g., enrich perspective on life, gain knowledge of history and culture of a destination) and physically challenging (i.e., being challenged or feeling energized physically).

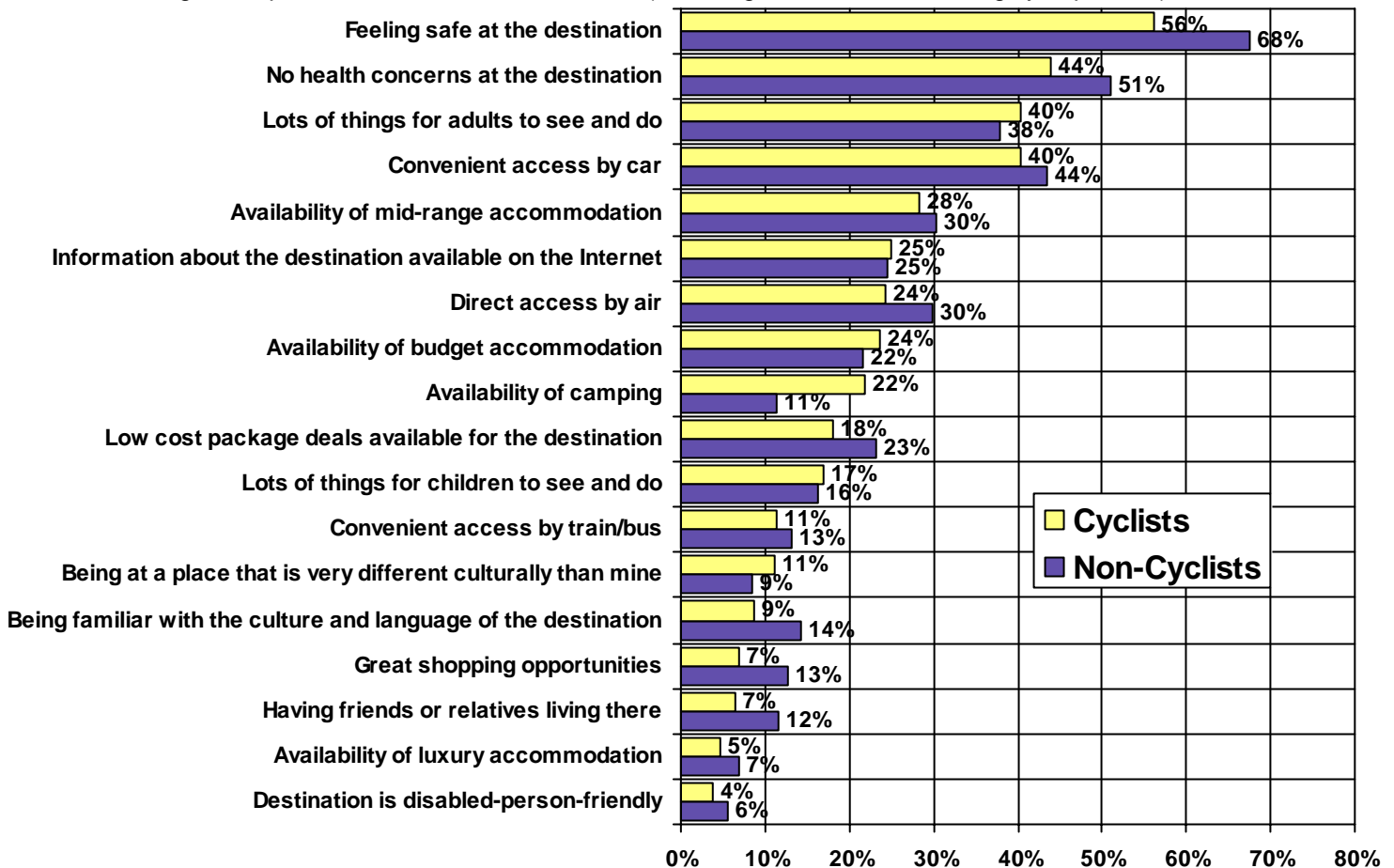
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, the majority of Cyclists consider it important that they feel safe at a destination, albeit to a lesser extent than Non-Cyclists. However, Cyclists consider it more important that a destination has camping available. They consider it less important that a destination has no health concerns, is directly accessible by air, offers low-cost package deals and great shopping opportunities, has a familiar culture and language and has friends or relatives living nearby.

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



How Destinations are Selected

Similar to the average Canadian Pleasure Traveler, Cyclists tend to start planning for summer and winter trips with a particular destination in mind. However, Cyclists are more likely than average to start trip planning by considering what specific activities they would like to do while on vacation.

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

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market	2,494,384	15,945,125	18,439,508	100
Summer				
Started with a desired destination in mind	51.4%	48.0%	48.5%	106
Started by considering specific activities wanted to do	17.0%	13.2%	13.8%	123
Started with a certain type of vacation experience in mind	22.5%	23.9%	23.7%	95
Looked for packaged deals - no destination in mind	1.0%	1.4%	1.3%	78
Considered something else first	3.3%	4.5%	4.3%	78
Don't know / Other	4.7%	9.0%	8.4%	56
Winter				
Started with a desired destination in mind	43.9%	49.5%	48.6%	90
Started by considering specific activities wanted to do	22.9%	14.2%	15.6%	147
Started with a certain type of vacation experience in mind	20.7%	19.0%	19.3%	107
Looked for packaged deals - no destination in mind	2.7%	3.3%	3.2%	86
Considered something else first	3.5%	4.9%	4.7%	75
Don't know / Other	6.2%	9.1%	8.6%	72

Trip Planning and Information Sources Consulted

The majority of Cyclists were responsible for planning their trips either on their own (43.9%) or with someone else (13.4%). When making vacation plans, Cyclists consulted a wider variety of sources than the average Canadian Pleasure Traveler. Most Cyclists used the Internet, word-of-mouth and past experiences to plan trips. However, Cyclists are more likely than others to obtain information from official sources (e.g., travel guides or brochures from state/province, visitor information centres), newspaper or magazine articles, travel guidebooks such as Fodor's, television programs and trade, travel or sports shows.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market		2,494,384	15,945,125	18,439,508	100
Who Plans Trips?	Respondent plans trips	43.9%	41.7%	42.0%	105
	Trip planning a shared responsibility	13.4%	16.9%	16.4%	81
	Someone else plans trips	42.7%	41.3%	41.5%	103
Information Sources Consulted	An Internet website	80.8%	62.7%	65.2%	124
	Advice of others / Word-of-mouth	64.5%	48.9%	51.1%	126
	Past experience / Been there before	59.7%	48.9%	50.4%	118
	Maps	43.9%	30.7%	32.6%	135
	Official travel guides or brochures from state /province	41.0%	23.5%	26.0%	158
	A travel agent	39.1%	33.3%	34.1%	115
	Visitor information centres	36.5%	21.2%	23.4%	156
	Articles in newspapers / magazines	33.1%	18.8%	20.9%	158
	Travel guide books such as Fodor's	22.3%	12.2%	13.6%	164
	An auto club such as CAA	22.2%	16.9%	17.7%	126
	Advertisements in newspapers / magazines	19.5%	13.4%	14.3%	137
	Travel information received in the mail	13.1%	8.1%	8.8%	148
	Programs on television	12.9%	6.6%	7.5%	172
	An electronic newsletter or magazine received by e-mail	6.0%	3.9%	4.2%	143
	Advertisements on television	5.9%	4.9%	5.0%	117
Visits to trade, travel or sports shows	5.7%	2.7%	3.1%	183	

Use of the Internet to Plan and Arrange Trips

Cyclists are more likely than the average Canadian Pleasure Traveler to use the Internet to plan (75.3%) and book travel (48.7%). In fact, Cyclists were the fifth most likely of the 21 outdoor activity types to purchase trip components online. The majority of Cyclists use hotel or resort websites, official tourism websites (e.g., country, region or city websites) and airline websites. They are also more likely than average to use the websites of motorcoach lines or specific attractions. Given that cyclists are less likely to take ocean cruises, it is not surprising that they are less likely to use cruise line websites. Accommodation and airline tickets were the trip components most often purchased online. Cyclists were also more likely than others to use the Internet for to purchase tickets for specific activities or attractions and rail, bus and boat/ship fares.

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

		Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market		2,494,384	15,945,125	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	24.7%	43.4%	40.8%	61
	Uses Internet to plan trips only	26.6%	21.4%	22.1%	120
	Uses Internet to book part of trip	48.7%	35.2%	37.0%	132
Types of Websites Consulted	A website of a hotel or resort	63.0%	55.7%	57.0%	110
	A tourism website of a country / region / city	58.7%	47.9%	49.8%	118
	An airline website	50.5%	45.5%	46.3%	109
	A travel planning / booking website	46.2%	45.6%	45.7%	101
	A website of an attraction	43.5%	32.5%	34.5%	126
	Some other website	33.6%	26.3%	27.6%	122
	A cruise line website	7.6%	8.2%	8.1%	94
	A motorcoach website	3.2%	2.3%	2.5%	131
Parts of Trips Booked Over The Internet	Accommodation	77.2%	67.4%	69.2%	112
	Air tickets	71.2%	69.1%	69.5%	103
	Car rental	31.5%	26.2%	27.1%	116
	Tickets or fees for specific activities or attractions	29.0%	22.5%	23.6%	123
	Tickets for rail, bus or boat / ship fares	21.1%	14.1%	15.3%	138
	A package containing two or more items	14.6%	15.6%	15.4%	95
	Other	4.3%	3.9%	3.9%	109

Media Consumption Habits

Cyclists are avid consumers of travel-related media including the travel sections of daily and weekend newspapers, travel magazines, travel television programs and travel websites. Cyclists can also be effectively targeted effectively through their interests in natural science (e.g., science & geography magazines, science & nature television shows), outdoor activities (e.g., outdoor activity & sports magazines) and technology (e.g., photography & video magazines; computer, electronics & technology magazines). This segment is also more likely to listen to specialty radio programming (including multicultural, jazz and classical music) and modern or alternative rock radio.

Fig. 17 Media Consumption Habits

		Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market		2,494,384	15,945,125	18,439,508	100
Newspaper Readership	Reads daily newspaper	88.2%	87.1%	87.3%	101
	Reads weekend edition of newspaper	88.4%	87.1%	87.3%	101
	Reads local neighbourhood or community newspapers	65.5%	60.9%	61.5%	106
	Reads other types of newspapers	18.6%	16.9%	17.2%	108
	Frequently or occasionally reads travel section of daily newspaper	49.3%	45.2%	45.7%	108
	Frequently or occasionally reads travel section of weekend newspaper	53.8%	46.3%	47.3%	114
Types of Magazines Read (Top 5 Indexed)	Photography and video	7.4%	3.5%	4.1%	183
	Outdoor activities/sports	20.5%	11.6%	12.8%	159
	Science and geography	25.3%	15.2%	16.6%	152
	Travel (e.g., Condé Nast)	17.3%	10.9%	11.8%	147
	Computers, electronics and technology	14.9%	9.7%	10.4%	143
Type of Television Programs Watched (Top 5 Indexed)	Science & nature shows	51.6%	42.6%	43.8%	118
	Late night talk shows	31.0%	27.0%	27.5%	113
	Travel shows	32.3%	30.0%	30.3%	106
	Science fiction / Fantasy shows	20.2%	19.1%	19.2%	105
	History	42.8%	41.7%	41.8%	102
Type of Radio Programs Listened To (Top 5 Indexed)	Multicultural	11.7%	7.8%	8.4%	140
	Jazz / Big band	11.9%	8.3%	8.8%	136
	Classical music	21.6%	16.6%	17.2%	125
	Modern rock / Alternative rock	45.7%	35.7%	37.1%	123
	News / Talk / Information	46.0%	38.4%	39.4%	117
Types of Websites Visited (Top 5 Indexed)	Sites for specific activities or interests	42.2%	34.7%	35.9%	118
	Travel	57.0%	49.4%	50.6%	113
	Magazine sites	18.1%	16.3%	16.6%	109
	Network news sites (e.g., CBC, CNN)	39.0%	35.6%	36.1%	108
	Newspaper sites	33.6%	31.5%	31.8%	106

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