

CANADIAN TRAVEL MARKET

Fishing While on Trips Of One or More Nights

A Profile Report

October 15, 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



Fishing While on Trips

Executive Summary

Over the last two years, 17.6% (4,351,708) of adult Canadians went fishing while on an out-of-town, overnight trip of one or more nights. Fishing was the fifth most common outdoor activity undertaken by Canadian Pleasure Travelers. Fresh-water fishing (15.3%) on trips was more common than ice fishing (3.9%), salt-water fishing (3.1%) or trophy fishing (0.5%). Among those who fished on trips, almost one-half (48.6%, or 2,115,688 adult Canadians) reported that fishing was the main reason for taking at least one trip. Fishing was the outdoor activity cited fifth most often as the main reason for taking a trip.

Relative to the average Canadian Pleasure Traveler, Anglers are predominantly male (61.2%), and well-represented among those 18 to 54. They have the fifth lowest household income (\$76,370) and are the third least likely to have a university education of the 21 outdoor activity types. Anglers are overrepresented in Saskatchewan and Manitoba.

Relative to the other 21 outdoor activity types, Anglers primarily travel within their own province or region. They were the least likely of the 21 outdoor activity types to have taken a trip to another province or region in Canada and the second least likely to have traveled to the United States (47.3%). Nevertheless, Anglers are over-represented among visitors to Saskatchewan, Manitoba and the northern territories (e.g., Yukon, Northwest Territories, Nunavut).

Anglers were more active in outdoor activities while on trips than the average Canadian Pleasure Traveler. They were especially active in nature-oriented activities such as hunting, wilderness activities and snowmobiling & ATVing. Anglers also exhibit particular interest in sporting events (e.g., professional sports, amateur tournaments) both while traveling and not traveling. Anglers were most likely to go camping while on trips and to have pursued wilderness experiences (e.g., wilderness tours). They seek vacations that allow them to get away from their day-to-day environment, relax and relieve stress and find solitude and isolation.

Relative to the other 21 outdoor activity types, Anglers are less likely to use the Internet to plan (60.1%) or book travel (35.3%). They were the fourth least likely of the 21 outdoor activity types to use travel-related media and tend to rely on past experience, word-of mouth and maps when planning travel. Anglers can be most effectively targeted through outdoor and nature magazines and sports-related media.

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 fishing 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.

Fishing While on Trips

Market Incidence

Over the last two years, 17.6% (4,351,708) of adult Canadians went fishing while on an out-of-town trip of one or more nights. Fishing was the fifth most likely outdoor activity undertaken by Canadian Pleasure Travelers. Fresh-water fishing (15.3%) was the most popular fishing activity while on a trip. Ice fishing (3.9%) and salt-water fishing (3.1%) were the next most popular fishing activities, followed by trophy fishing (0.5%).

Of those who went fishing on a trip, 48.6% (2,115,688) reported that fishing was the main reason for taking at least one trip in the past two years. Fishing was the outdoor activity type cited fifth most often as the main reason for taking a trip. At least one-half of those who went trophy fishing (63.6%), ice fishing (52.1%) and fresh-water fishing (49.6%) reported that these activities were the main reason for taking at least one trip over the course of the last two years. Salt-water fishing (31.8%) was less likely than other fishing activities to be the main reason for taking at least one overnight trip.

Fig. 1 Incidence of Fishing While on Trips¹

	Number of Anglers ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	4,351,708	2,115,688	18,439,508	24,776,103
Fishing (All Activities)	4,351,708	48.6%	23.6%	17.6%
Fresh-water fishing	3,780,951	49.6%	20.5%	15.3%
Ice fishing	970,154	52.1%	5.3%	3.9%
Salt-water fishing	772,294	31.8%	4.2%	3.1%
Trophy fishing	133,153	63.6%	0.7%	0.5%
Participated in all four fishing activities	11,446	20.6%	0.1%	LT 0.1%

- 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 - "Anglers" are defined as individuals who went fishing 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

Those who went fishing while on a trip are fairly well-distributed across the regions of Canada. However, relative to the average Canadian Pleasure Traveler, Anglers are more likely to live in Saskatchewan and Manitoba and less likely to live in the Atlantic Provinces.

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

	Total Population	Estimated Number Who Went Fishing on a Trip	Percent of Pleasure Travelers in Region Who Went Fishing on a Trip	Percent of Total Regional Population Who Went Fishing on a Trip
Canada	24,776,103	4,351,708	23.6%	17.6%
Atlantic Provinces	1,822,494	215,913	17.0%	11.8%
Quebec	5,940,869	1,015,607	24.2%	17.1%
Ontario	9,671,592	1,693,128	23.6%	17.5%
Manitoba	843,107	175,209	29.4%	20.8%
Saskatchewan	706,325	176,804	32.6%	25.0%
Alberta	2,465,540	474,020	23.6%	19.2%
British Columbia	3,326,176	601,027	22.6%	18.1%

Demographic Profile

Relative to the average Canadian Pleasure Traveler, Anglers are more likely to be male, and married with dependent children under 18 years of age living at home. Anglers are somewhat over-represented among 35 to 44 year olds. They report the fifth lowest household income (\$76,370) and were the third least likely to have a university education of the 21 outdoor activity types.

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

		Anglers	Non-Anglers ¹	Pleasure Travelers	Index ²
Attribute	Size of Market	4,351,708	14,087,800	18,439,508	100
Gender	Male	61.2%	45.0%	48.8%	125
	Female	38.8%	55.0%	51.2%	76
Age of Respondent	18 to 24	13.4%	12.6%	12.8%	105
	25 to 34	20.1%	19.0%	19.3%	104
	35 to 44	24.1%	19.4%	20.5%	117
	45 to 54	22.1%	19.8%	20.3%	109
	55 to 64	12.2%	14.7%	14.1%	87
	65 Plus	8.0%	14.4%	12.9%	62
Average Age		42.5	45.2	44.5	N/A
Marital Status	Not married	27.7%	33.6%	32.2%	86
	Married	72.3%	66.4%	67.8%	107
Parental Status	No children under 18	66.3%	72.6%	71.1%	93
	Children under 18	33.7%	27.4%	28.9%	117
Education	High school or less	39.3%	35.3%	36.2%	108
	Some post-secondary	11.2%	11.2%	11.2%	100
	Post-secondary diploma/certificate	24.0%	21.3%	21.9%	109
	University degree	25.6%	32.3%	30.7%	83
Household Income	Under \$20,000	5.2%	5.9%	5.7%	91
	\$20,000 to \$39,999	12.6%	15.1%	14.5%	87
	\$40,000 to \$59,999	15.8%	16.8%	16.5%	96
	\$60,000 to \$79,999	15.4%	15.2%	15.2%	101
	\$80,000 to \$99,999	13.1%	11.9%	12.2%	107
	\$100,000 or more	26.0%	21.8%	22.8%	114
	Not stated	11.9%	13.3%	13.0%	91
Average Household Income		\$76,370	\$71,717	\$72,829	N/A

- 1 - "Non-Anglers" are defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years but did not go fishing on any trip. The number of Anglers and Non-Anglers equals the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Anglers in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Anglers 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)

While almost all Anglers (98.5%) took one or more overnight trips within Canada during the past two years, the majority of these trips were within their own province or region. Relative to the other 21 outdoor activity types, Anglers were the least likely to have taken a trip to another province or region in Canada and the second least likely to have traveled to the United States (47.3%). Nevertheless, Anglers are over-represented among visitors to Saskatchewan, Manitoba and the northern territories (e.g., Yukon, Northwest Territories, Nunavut).

Anglers were slightly more likely than the average Canadian Pleasure Traveler to have visited Mexico in the past two years. They were less likely than average to have taken trips to the United States, the Caribbean and overseas destinations.

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

	Anglers	Non-Anglers	Pleasure Travelers	Index
Size of Market	4,351,708	14,087,800	18,439,508	100
Canada	98.5%	93.6%	94.8%	104
Took a trip within own province / region	93.5%	83.5%	85.9%	109
Took a trip to an adjacent province / region	51.2%	47.7%	48.6%	106
Took a trip to non-adjacent province / region	30.7%	31.7%	31.4%	98
Newfoundland and Labrador	4.8%	4.2%	4.3%	112
Prince Edward Island	6.7%	7.3%	7.2%	93
New Brunswick	10.3%	12.3%	11.8%	87
Nova Scotia	11.4%	13.1%	12.7%	90
Quebec	39.6%	38.7%	38.9%	102
Ontario	56.9%	52.5%	53.5%	106
Manitoba	11.8%	8.3%	9.2%	129
Saskatchewan	15.6%	10.1%	11.4%	137
Alberta	27.9%	25.2%	25.8%	108
British Columbia	31.4%	30.4%	30.6%	102
Yukon	1.5%	0.8%	1.0%	153
Northwest Territories	1.1%	0.5%	0.7%	168
Nunavut	0.5%	0.2%	0.3%	162
United States	47.3%	51.7%	50.7%	93
Mexico	13.4%	12.1%	12.4%	108
Caribbean	15.1%	15.8%	15.6%	97
All other destinations	18.8%	25.1%	23.6%	80

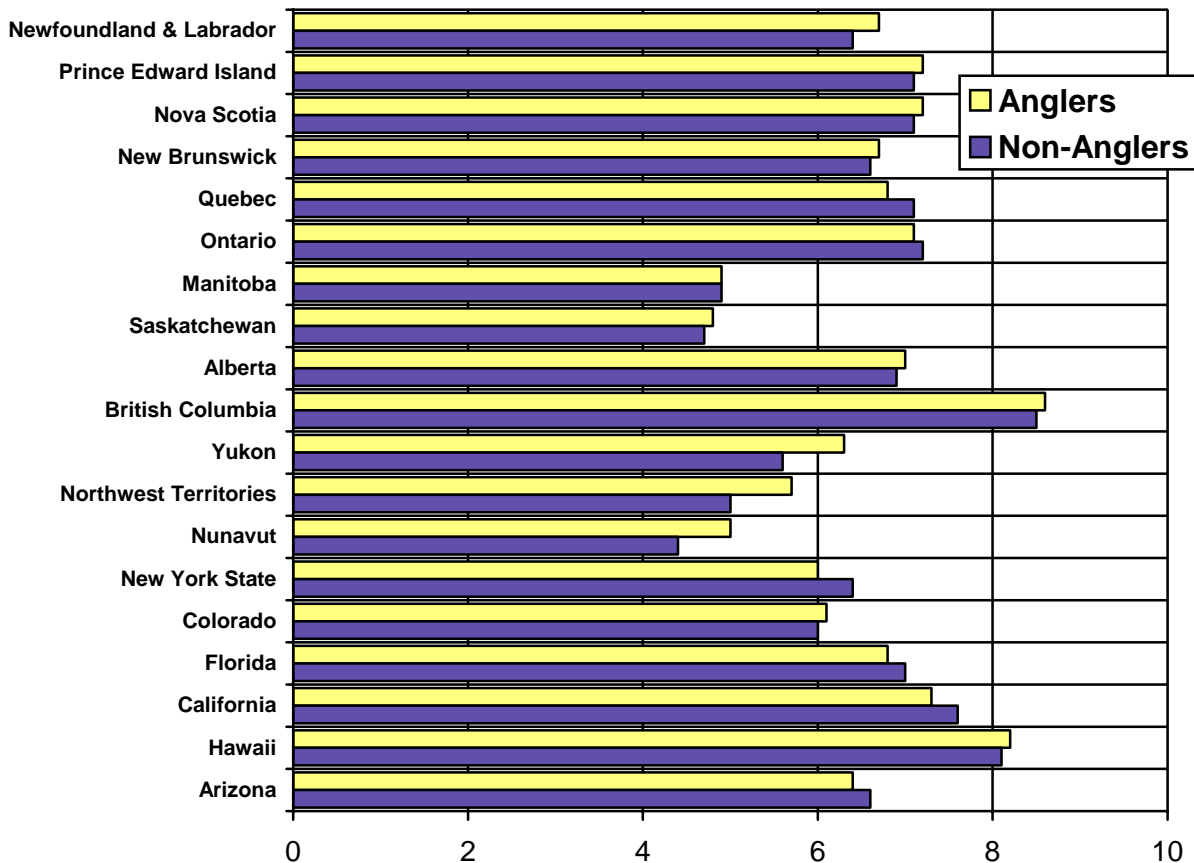
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Overall, the appeal of the Canadian provinces is comparable among Anglers and Non-Anglers. Anglers rate British Columbia (8.6) as the most appealing Canadian destination, followed by Nova Scotia (7.2), Prince Edward Island (7.2) and Ontario (7.1). Anglers rated the northern territories (i.e., Yukon, Northwest Territories, Nunavut) as more appealing than Non-Anglers.

Anglers are less likely to travel to the United States than other Canadian Pleasure Travelers and tend to rate most of the U.S. reference states as less appealing than Non-Anglers (e.g., New York State, Florida, California and Arizona).

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

Anglers were more likely than the average Canadian Pleasure Traveler to participate in outdoor activities while on trips. The majority of Anglers went boating, swimming and wildlife viewing while on trips. Relative to the average Canadian Pleasure Traveler, Anglers were three times more likely to go hunting and twice as likely to go snowmobiling and ATVing, and freshwater scuba diving and snorkeling. They were also more likely to play golf and team sports, go skating and participate in wilderness activities while on trips.

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

	Anglers	Non-Anglers	Pleasure Travelers	Index
Size of Market	4,351,708	14,087,800	18,439,508	100
Boating & Swimming (e.g., motorboating, swimming in lakes)	66.9%	33.2%	41.1%	163
Ocean Activities (e.g., swimming in ocean, sunbathing)	57.2%	45.9%	48.5%	118
Wildlife Viewing	51.7%	38.0%	41.2%	125
Hiking, Climbing & Paddling	45.0%	30.7%	34.1%	132
Sports & Games (e.g., tennis, board games)	30.9%	20.2%	22.7%	136
Golfing	28.0%	15.3%	18.3%	153
Snowmobiling & ATVing	24.3%	7.4%	11.3%	214
Skating (e.g., ice skating, rollerblading)	21.1%	9.1%	12.0%	177
Downhill Skiing & Snowboarding	20.5%	12.8%	14.6%	140
Cycling	19.9%	11.6%	13.5%	147
Exercising & Jogging	19.6%	14.7%	15.9%	123
Team Sports (e.g., hockey, baseball)	18.2%	9.3%	11.4%	160
Hunting	13.9%	1.9%	4.7%	296
Cross-country Skiing & Snowshoeing	13.6%	8.0%	9.3%	146
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	8.5%	5.6%	6.3%	135
Horseback Riding	7.3%	4.2%	4.9%	148
Freshwater Scuba & Snorkeling	6.2%	2.0%	3.0%	205
Wilderness Activities (e.g., wilderness skills course)	4.2%	1.8%	2.4%	179
Motorcycling	4.2%	2.6%	3.0%	140
Extreme Air Sports (e.g., parachuting)	1.4%	1.0%	1.1%	126

Outdoor Activities Pursued in a Typical Year

Anglers are quite active in outdoor activities when not traveling. In addition to fishing, Anglers frequently take day outings to parks, swim, garden at home and exercise at home or at a fitness club. Relative to the average Canadian Pleasure Traveler, Anglers were particularly more likely to participate have gone hunting, camping, sailing or other boating, canoeing or kayaking, ATVing and snowmobiling while not traveling.

Fig. 7 Outdoor Activities Pursued in a Typical Year

	Anglers	Non-Anglers	Pleasure Travelers	Index
Size of Market	4,351,708	14,087,800	18,439,508	100
Fishing	71.8%	16.1%	29.3%	245
Day outing to a park	69.8%	66.0%	66.9%	104
Swimming	68.2%	57.8%	60.3%	113
Gardening	64.3%	58.4%	59.8%	108
Exercising at home or at a fitness club	58.4%	61.8%	61.0%	96
Camping	55.8%	33.3%	38.6%	145
Picnicking	55.5%	52.3%	53.1%	105
Hiking	54.5%	47.0%	48.8%	112
Cycling	51.3%	42.1%	44.3%	116
Golfing	39.2%	26.3%	29.4%	134
Sailing or other boating	39.2%	18.6%	23.4%	167
Ice-skating	36.6%	26.0%	28.5%	128
Playing team sports	30.1%	20.7%	22.9%	131
Canoeing or kayaking	26.2%	14.0%	16.9%	155
Riding an all-terrain vehicle (ATV)	26.1%	10.6%	14.3%	183
Jogging	24.9%	23.8%	24.1%	104
Downhill skiing	21.7%	14.5%	16.2%	134
Playing racquet sports (e.g., tennis or badminton)	21.4%	18.4%	19.1%	112
Snowmobiling	18.2%	7.2%	9.8%	186
Hunting	18.1%	4.5%	7.7%	234
Rollerblading	16.3%	13.8%	14.4%	113
Cross-country skiing	14.7%	11.8%	12.5%	118
Horseback riding	8.9%	6.2%	6.8%	130
Snowboarding	6.6%	4.6%	5.0%	132
Skateboarding	2.3%	1.4%	1.6%	142

Culture and Entertainment Activities Pursued While on Trips

Those who went fishing on a trip in the past two years were less active in most culture and entertainment activities than most of the 21 outdoor activity types. The majority of Anglers went shopping and dining and visited historical sites, museums and art galleries while on trips. Relative to the average Canadian Pleasure Traveler, Anglers were especially more likely to have attended sporting events (e.g., professional sporting events, amateur tournaments) and attractions with an agricultural or western theme (e.g., agro-tourism, equestrian & western events).

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

	Anglers	Non-Anglers	Pleasure Travelers	Index
Size of Market	4,351,708	14,087,800	18,439,508	100
Shopping & Dining	82.8%	82.9%	82.9%	100
Historical Sites, Museums & Art Galleries	58.3%	58.3%	58.3%	100
Fairs & Festivals	46.8%	34.9%	37.7%	124
Theme Parks & Exhibits	44.5%	37.5%	39.2%	114
Musical Concerts, Festivals & Attractions	39.6%	30.6%	32.7%	121
Casinos	30.7%	24.4%	25.9%	119
Wine, Beer & Food Tastings	26.0%	23.1%	23.8%	109
Science & Technology Exhibits	25.8%	22.3%	23.1%	112
Professional Sporting Events	22.6%	13.5%	15.7%	144
Live Theatre	21.8%	20.9%	21.1%	103
Agro-Tourism	21.2%	14.0%	15.7%	135
Garden Theme Attractions	19.0%	17.2%	17.6%	108
Amateur Tournaments	17.9%	9.9%	11.8%	152
Aboriginal Cultural Experiences	15.7%	10.3%	11.6%	136
Comedy Festivals & Clubs	12.8%	9.3%	10.1%	126
Spas	10.5%	9.9%	10.0%	105
High Art Performances	10.3%	11.2%	11.0%	93
Equestrian & Western Events	9.9%	5.6%	6.7%	149
Participatory Historical Activities	9.0%	6.0%	6.7%	135
National & International Sporting Events	5.1%	2.6%	3.2%	158
Literary & Film Festivals	2.7%	2.5%	2.6%	104

Culture and Entertainment Activities Pursued in a Typical Year

Anglers are generally less active than the average Canadian Pleasure Traveler in most culture and entertainment pursuits when not traveling. The majority of Anglers dined in local restaurants, visited local festivals and fairs and attended local amateur sporting events. They were also more likely to have gone to local rodeos, local rock concerts and bars with live bands. On the other hand they were less likely to have patronized the high arts (e.g., ballet, opera) or local art galleries and art shows.

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

	Anglers	Non-Anglers	Pleasure Travelers	Index
Size of Market	4,351,708	14,087,800	18,439,508	100
Going out to eat in restaurants	91.7%	91.5%	91.5%	100
Going to festivals or fairs	64.6%	60.5%	61.4%	105
Going to amateur sporting events	50.0%	39.5%	42.0%	119
Going to pick-your-own farms or farmers' market	42.6%	40.5%	41.0%	104
Going to professional sporting events	38.8%	30.0%	32.1%	121
Going to historic sites or heritage buildings	38.4%	39.6%	39.3%	98
Going to zoos or aquariums	33.8%	29.4%	30.4%	111
Going to amusement or theme parks	33.1%	27.6%	28.9%	115
Going to bars with live pop or rock bands	33.1%	26.0%	27.7%	119
Going dancing	31.1%	29.5%	29.9%	104
Going to museums	30.0%	33.6%	32.7%	92
Going to live theatre	29.4%	36.5%	34.8%	84
Going to rock music concerts	27.5%	20.9%	22.4%	123
Going to art galleries or art shows	26.8%	33.3%	31.8%	84
Going to botanical gardens	23.6%	25.9%	25.4%	93
Going to gamble in casinos	20.4%	17.4%	18.1%	113
Going to classical music concerts	13.1%	17.5%	16.5%	80
Going to day spas	11.6%	14.4%	13.8%	85
Going to rodeos	10.4%	6.4%	7.3%	142
Staying overnight in a hotel or B&B in own city	10.4%	9.7%	9.9%	105
Going to jazz clubs	7.3%	7.6%	7.5%	97
Going to the ballet	5.3%	7.9%	7.3%	73
Going to the opera	4.6%	7.2%	6.6%	69

Accommodation Stayed In While on a Trip

Relative to the average Canadian Pleasure Traveler, Anglers were more likely to go camping and stay in wilderness accommodation while on trips. Anglers were more than twice as likely as the average Canadian Pleasure Traveler to have stayed at a wilderness campsite, lodge or outpost (e.g., wilderness lodge accessible by car, remote or fly-in wilderness lodge or outpost).

Fig. 10 Accommodation Stayed in While on Trips

	Anglers	Non-Anglers	Pleasure Travelers	Index
Size of Market	4,351,708	14,087,800	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	39.4%	22.3%	26.4%	150
Lakeside / Riverside Resort	30.3%	19.9%	22.3%	136
A Private Campground	29.4%	15.5%	18.8%	157
Seaside Resort	21.4%	20.5%	20.7%	103
A Camp Site in a Wilderness Setting (Not a Campground)	17.9%	5.7%	8.6%	209
Ski Resort or Mountain Resort	16.6%	13.1%	13.9%	119
Wilderness Lodge You Can Drive to by Car	14.2%	3.0%	5.6%	253
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	6.6%	3.8%	4.5%	146
Health Spa	6.3%	5.8%	5.9%	107
Country Inn or Resort with Gourmet Restaurant	5.3%	5.0%	5.1%	104
Remote or Fly-In Wilderness Lodge	4.9%	0.6%	1.6%	305
Farm or Guest Ranch	3.4%	2.9%	3.0%	111
On a Houseboat	2.7%	1.0%	1.4%	195
Remote or Fly-In Wilderness Outpost	1.8%	0.2%	0.6%	315
Cooking School	0.4%	0.3%	0.4%	127
Wine Tasting School	0.3%	0.2%	0.3%	113

Tours and Cruises Taken During Past Two Years

Anglers were slightly more likely than the average Canadian Pleasure Traveler to have taken most types of tours or cruises in the past two years. Relative to the average Canadian Pleasure Traveler, Anglers were especially likely to take a wilderness tour, a casino tour, and an air tour in an airplane or helicopter. They were also more likely than average to have taken lake and river cruises (e.g., St. Lawrence River cruise, Great Lakes cruise, cruise on another lake or river). On the other hand, Anglers were less likely to have taken an ocean cruise (e.g., Caribbean cruise, Alaskan cruise).

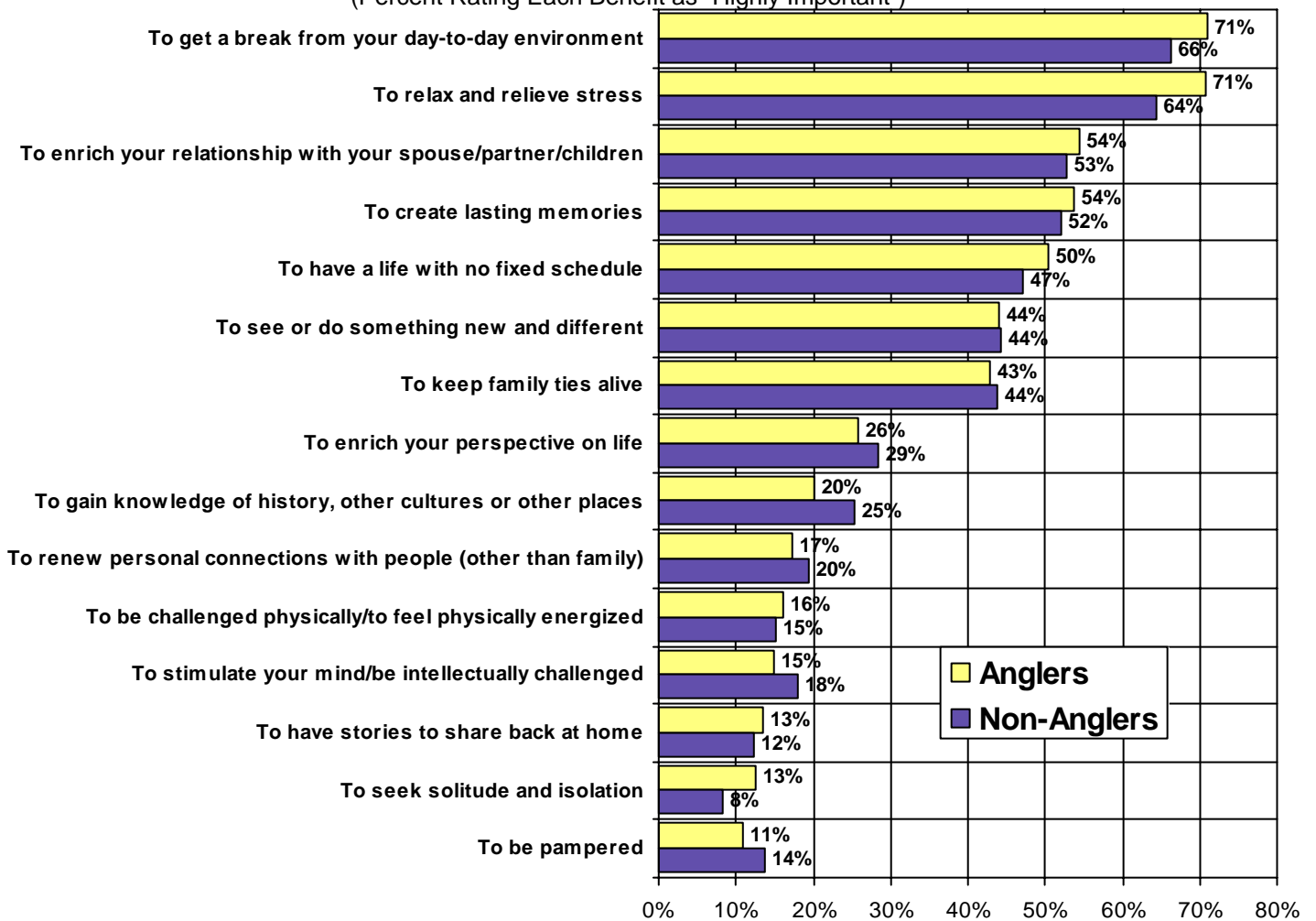
Fig. 11 Tours and Cruises Taken During Past Two Years

	Anglers	Non-Anglers	Pleasure Travelers	Index
Size of Market	4,351,708	14,087,800	18,439,508	100
A self-guided, sameday tour while on an overnight trip	32.7%	28.2%	29.3%	112
Around the city	22.8%	23.5%	23.4%	98
An organized, sameday, guided tour while on an overnight trip	21.0%	22.6%	22.2%	95
Around the countryside - scenic drives	25.7%	21.4%	22.4%	115
A self-guided, overnight tour where you stayed in different locations	20.1%	17.5%	18.1%	111
On the water (sightseeing cruise)	15.2%	12.4%	13.1%	116
Wilderness tour	17.5%	11.6%	13.0%	135
An organized, overnight, guided tour where you stayed in different locations	8.9%	10.4%	10.1%	89
Some other type of tour	10.5%	9.6%	9.8%	107
An organized, overnight, guided tour where you stayed in a single location	8.4%	7.7%	7.8%	107
To a casino	8.2%	6.0%	6.5%	125
Caribbean ocean cruise	4.3%	5.7%	5.4%	79
To a winery	5.9%	5.6%	5.6%	104
Ocean cruise – Other	3.1%	3.4%	3.3%	93
To a factory	2.8%	2.6%	2.6%	107
Cruise on another lake or river	3.1%	2.2%	2.4%	131
Cruise on the St. Lawrence River	2.4%	1.8%	1.9%	123
In the air as a pilot or passenger of an airplane or helicopter	2.5%	1.7%	1.9%	133
Alaskan ocean cruise	1.5%	1.7%	1.6%	93
Some other type of cruise	1.8%	1.5%	1.6%	111
Great Lakes cruise	1.1%	0.7%	0.8%	138
Submarine cruise	0.1%	0.1%	0.1%	104

Benefits Sought While On a Vacation

As with the majority of Canadian Pleasure Travelers, most anglers 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 live without a fixed schedule. Relative to Non-Anglers, Anglers consider it particularly important that a vacation gives them a break from their day-to-day environment, allows them to relax and relieve stress, and provides solitude and isolation. Anglers consider it less important that a vacation allows them to learn about the history or culture of a destination.

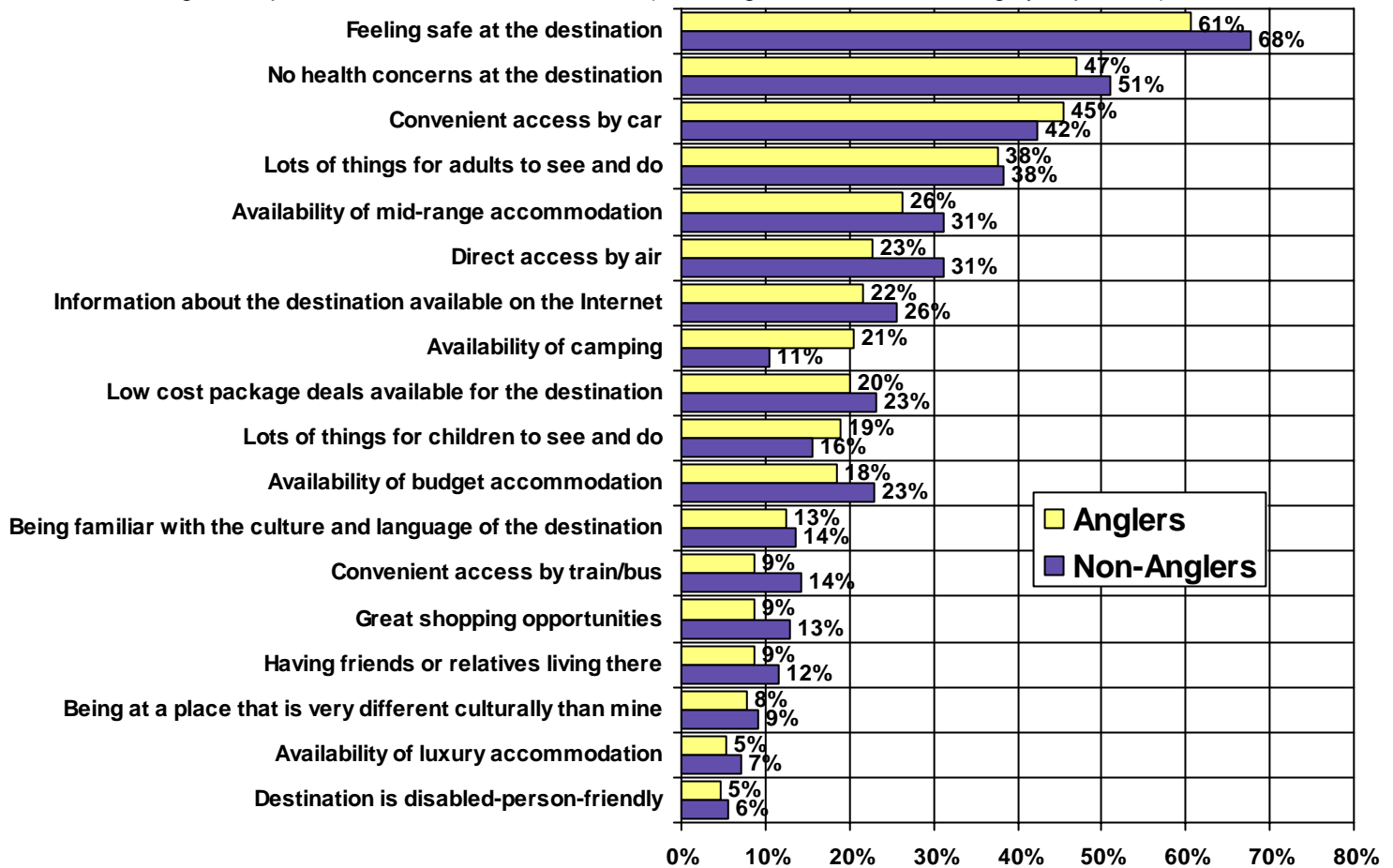
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, Anglers consider it important that they feel safe at a destination, although less so than Non-Anglers. Relative to the average Canadian Pleasure Traveler, Anglers consider it more important that a destination offers camping and is conveniently accessible by car. They consider it less important that a destination offers moderately priced accommodation, direct access by air and convenient access by train or bus.

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



How Destinations are Selected

Similar to the average Canadian Pleasure Traveler, Anglers tend to start planning trips with a particular destination in mind. However, Anglers are more likely than average to start planning trips by considering what activities they would like to do while on vacation. Anglers are less likely than average to look for vacation package deals with no destination in mind.

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

	Anglers	Non-Anglers	Pleasure Travelers	Index
Size of Market	4,351,708	14,087,800	18,439,508	100
Summer				
Started with a desired destination in mind	46.9%	49.0%	48.5%	97
Started by considering specific activities wanted to do	16.0%	13.0%	13.8%	116
Started with a certain type of vacation experience in mind	24.9%	23.3%	23.7%	105
Looked for packaged deals - no destination in mind	1.1%	1.4%	1.3%	87
Considered something else first	2.7%	4.8%	4.3%	63
Don't know / Other	8.4%	8.4%	8.4%	100
Winter				
Started with a desired destination in mind	46.2%	49.5%	48.6%	95
Started by considering specific activities wanted to do	19.2%	14.3%	15.6%	123
Started with a certain type of vacation experience in mind	19.8%	19.1%	19.3%	102
Looked for packaged deals - no destination in mind	2.9%	3.3%	3.2%	89
Considered something else first	4.2%	4.8%	4.7%	90
Don't know / Other	7.8%	8.9%	8.6%	90

Trip Planning and Information Sources Consulted

The majority of Anglers were responsible for planning their trips either on their own (38.3%) or with someone else (17.2%).

The majority of Anglers use the Internet, word-of-mouth and past experiences to plan travel. Anglers are particularly more likely than average to obtain trip planning information from trade, travel and sports shows. On the other hand, they are less likely to use travel agents, travel guidebooks or email newsletters or magazines to plan trips.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Anglers	Non-Anglers	Pleasure Travelers	Index
Size of Market		4,351,708	14,087,800	18,439,508	100
Who Plans Trips?	Respondent plans trips	38.3%	43.2%	42.0%	91
	Trip planning a shared responsibility	17.2%	16.2%	16.4%	105
	Someone else plans trips	44.4%	40.6%	41.5%	107
Information Sources Consulted	An Internet website	65.4%	65.2%	65.2%	100
	Advice of others / Word-of-mouth	56.2%	49.5%	51.1%	110
	Past experience / Been there before	55.5%	48.8%	50.4%	110
	Maps	35.5%	31.6%	32.6%	109
	A travel agent	31.0%	35.1%	34.1%	91
	Official travel guides or brochures from state / province	27.4%	25.5%	26.0%	106
	Visitor information centres	24.3%	23.1%	23.4%	104
	Articles in newspapers / magazines	21.8%	20.6%	20.9%	105
	An auto club such as CAA	17.6%	17.7%	17.7%	100
	Advertisements in newspapers / magazines	14.8%	14.1%	14.3%	104
	Travel guide books such as Fodor's	11.9%	14.2%	13.6%	87
	Programs on television	9.7%	6.8%	7.5%	129
	Travel information received in the mail	9.1%	8.8%	8.8%	103
	Advertisements on television	5.6%	4.8%	5.0%	112
	Visits to trade, travel or sports shows	5.4%	2.4%	3.1%	172
	An electronic newsletter or magazine received by e-mail	3.6%	4.4%	4.2%	86

Use of the Internet to Plan and Arrange Trips

Relative to the other outdoor activity types, Anglers are less likely to use the Internet to plan (60.1%) or book trips (35.3%). Those Anglers who use the Internet most often consult hotel or resort websites and tourism-related websites of a specific country, region or city. They most often purchase accommodation and airline tickets online.

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

		Anglers	Non-Anglers	Pleasure Travelers	Index
Size of Market		4,351,708	14,087,800	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	39.9%	41.1%	40.8%	98
	Uses Internet to plan trips only	24.8%	21.3%	22.1%	112
	Uses Internet to book part of trip	35.3%	37.6%	37.0%	95
Types of Websites Consulted	A website of a hotel or resort	55.7%	57.4%	57.0%	98
	A tourism website of a country/region/city	50.8%	49.5%	49.8%	102
	A travel planning/booking website	41.9%	46.9%	45.7%	92
	An airline's website	41.2%	48.0%	46.3%	89
	A website of an attraction	34.4%	34.5%	34.5%	100
	Some other website	31.9%	26.2%	27.6%	116
	A cruise line website	7.0%	8.4%	8.1%	86
A motorcoach website	2.5%	2.4%	2.5%	102	
Parts of Trips Booked Over The Internet	Accommodation	70.3%	68.8%	69.2%	102
	Air tickets	63.5%	71.2%	69.5%	91
	Tickets or fees for specific activities or attractions	26.3%	22.9%	23.6%	111
	Car rental	25.1%	27.7%	27.1%	93
	A package containing two or more items	18.4%	14.5%	15.4%	119
	Tickets for rail, bus or boat/ship fares	13.3%	15.9%	15.3%	87
	Other	3.8%	4.0%	3.9%	97

Media Consumption Habits

Angler's keen interest in sports and nature is reflected in their media consumption preferences. Anglers are more likely than the average Canadian Pleasure Traveler to read sports magazines (e.g., outdoor activities & sports, professional sports), to watch sports programming on television, to listen to all-sports radio and to visit sports websites. They also have an above-average interest in nature-related media (e.g., science & nature television programs, science & geography magazines) and automotive magazines (e.g., automobile & cycle magazines). On the other hand, they were the fourth least likely of the 21 outdoor activity types to use travel-related media.

Fig. 17 Media Consumption Habits

		Anglers	Non-Anglers	Pleasure Travelers	Index
Size of Market		4,351,708	14,087,800	18,439,508	100
Newspaper Readership	Reads daily newspaper	88.2%	87.0%	87.3%	101
	Reads weekend edition of newspaper	88.3%	87.0%	87.3%	101
	Reads local neighbourhood or community newspapers	66.2%	60.1%	61.5%	108
	Reads other types of newspapers	16.9%	17.2%	17.2%	98
	Frequently or occasionally reads travel section of daily newspaper	43.1%	46.5%	45.7%	94
	Frequently or occasionally reads travel section of weekend newspaper	44.2%	48.3%	47.3%	93
Types of Magazines Read (Top 5 Indexed)	Outdoor activities / sports	22.9%	9.7%	12.8%	178
	Automobile and cycle magazines	18.4%	11.9%	13.4%	137
	Professional sports	11.3%	7.6%	8.5%	133
	Science and geography	20.8%	15.3%	16.6%	125
	Photography and video	4.8%	3.8%	4.1%	118
Type of Television Programs Watched (Top 5 Indexed)	Science & nature shows	53.2%	40.9%	43.8%	121
	Sports / sports shows	52.5%	40.5%	43.3%	121
	Science fiction / Fantasy shows	23.2%	18.0%	19.2%	121
	Music / Music video shows / channels	28.2%	24.6%	25.5%	111
	History	46.0%	40.5%	41.8%	110
Type of Radio Programs Listened To (Top 5 Indexed)	All sports	15.7%	9.6%	11.1%	141
	Modern rock / Alternative rock	46.3%	34.2%	37.1%	125
	Country music	28.4%	22.4%	23.8%	119
	Some other radio program	17.6%	15.0%	15.6%	113
	Oldies (50s, 60s, 70s, 80s)	37.4%	33.6%	34.5%	108
Types of Websites Visited (Top 5 Indexed)	Sites for specific activities or interests	45.3%	32.8%	35.9%	126
	Sports	33.3%	24.9%	26.9%	124
	Games	37.1%	31.5%	32.8%	113
	Weather	58.6%	55.3%	56.1%	105
	House and home	29.2%	27.8%	28.1%	104

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