

CANADIAN TRAVEL MARKET

Visiting Garden Theme Attractions While on Trips Of One or More Nights

A Profile Report

December 5, 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



Visiting Garden Theme Attractions While on Trips

Executive Summary

Over the last two years, 13.1% of adult Canadians (3,246,208) visited a garden theme attraction while on an out-of-town, overnight trip of one or more nights. Botanical gardens (10.8%) were visited on trips more often than garden theme parks (5.2%). Visiting a garden theme attraction while on a trip was the 10th most frequent culture and entertainment activity type undertaken by Canadian Pleasure Travelers in the past two years. However, of those who visited garden theme attractions, only 17.8% (578,726) reported that this activity was the main reason for taking at least one trip.

Relative to the average Canadian Pleasure Traveler, Garden Theme Attraction Visitors are more likely to be female (55.8%), 45 years of age or older and married without dependent children (less than 18 years of age) living at home. They are well-educated (41.0% university degree) and have above-average household incomes (\$76,029). They are over-represented in British Columbia, Alberta and Quebec.

Garden Theme Attraction Visitors are relatively active travelers. While they were only the 15th most likely of the 21 culture and entertainment activity types to have taken a trip within their own province or region (89.7%), they were the 9th most likely to have traveled to an adjacent province or region (57.2%) and the 7th most likely to have visited a non-adjacent province or region (41.5%) in the past two years. They were also the 11th most likely to have visited the United States (59.8%), the 9th most likely to have visited Mexico (13.8%), the 9th most likely to have taken a trip to the Caribbean (18.2%) and the 4th most likely to have traveled overseas in the last two years.

Garden Attraction Visitors were more active in culture and entertainment activities while on trips than the typical Canadian Pleasure Traveler. They were especially likely to visit educational attractions (e.g., theme parks & exhibits, science & technology exhibits), to take part in participatory activities (e.g., aboriginal cultural experiences, participatory historical activities) and attend live art performances (e.g., live theatre, high art performances). They were also very active in outdoor activities while on trips and particularly those involving nature (e.g., wildlife viewing; horseback riding) and fitness (e.g., cycling, exercise and jogging). They prefer highly active vacations that offer novelty and opportunities to learn.

Relative to the other culture and entertainment activity types, Garden Attraction Visitors are average users of the Internet to plan (68.5%) and book (47.3%) travel. However, they are above-average consumers of travel-related media and may also be effectively targeted through 'home and garden' media, natural science and nature media, city lifestyle magazines and multicultural, classical music and jazz / big band radio stations.

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 visited a garden theme attraction 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.

Visiting Garden Theme Attractions While on Trips

Market Incidence

Over the last two years, 13.1% of adult Canadians (3,246,208) visited a garden theme attraction while on an out-of-town, overnight trip of one or more nights. More adult Canadians visited a botanical garden (10.8%) than visited a garden theme park (5.2%) while on a trip. 2.9% of adult Canadians (710,694) visited both types of garden theme attractions while traveling in the past two years. Visiting a garden theme attraction while on a trip was the 10th most frequent culture and entertainment activity type undertaken by Canadian Pleasure Travelers in the past two years. However, of those who visited a garden theme attraction, only 17.8% (578,726) reported that this activity was the main reason for taking at least one trip in the past two years.

Fig. 1 Incidence of Visiting Garden Theme Attractions While on Trips¹

	Number of Garden Theme Attraction Visitors ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	3,246,208	578,726	18,439,508	24,776,103
Garden Theme Attractions (All Activities)	3,246,208	17.8%	17.6%	13.1%
Botanical garden	2,675,275	17.4%	14.5%	10.8%
Garden theme park	1,281,626	17.4%	7.0%	5.2%
Participated in both activities	710,694	15.5%	3.9%	2.9%

- 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 - Defined as individuals who visited a garden theme attraction while on an out-of-town 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 visited garden theme attractions while on trips are over-represented among Canadian Pleasure Travelers living in British Columbia, Alberta and Quebec. They are least likely to live in Saskatchewan, Manitoba and the Atlantic Region.

Fig. 2 Geographic Distribution of Those Who Visited Garden Theme Attractions While on Trips

	Total Population	Estimated Number Who Visited a Garden Theme Attraction on a Trip	Percent of Pleasure Travelers in Region Who Visited a Garden Theme Attraction on a Trip	Percent of Total Regional Population Who Visited a Garden Theme Attraction on a Trip
Canada	24,776,103	3,246,208	17.6%	13.1%
Atlantic Provinces	1,822,494	187,890	14.8%	10.3%
Quebec	5,940,869	776,742	18.5%	13.1%
Ontario	9,671,592	1,214,427	16.9%	12.6%
Manitoba	843,107	84,926	14.3%	10.1%
Saskatchewan	706,325	74,661	13.8%	10.6%
Alberta	2,465,540	377,783	18.8%	15.3%
British Columbia	3,326,176	529,779	19.9%	15.9%

Demographic Profile

Garden Theme Attraction Visitors are more likely to be female (55.8%). They are the 4th oldest of the 21 culture and entertainment activity types and over-represented among those 45 and older. They are slightly more likely than average to be married and slightly less likely to have dependent children (less than 18 years of age) living at home. They are well-educated and the 5th most likely to have a university degree (41.0%). Their household incomes are also above-average (\$76,029).

Fig. 3 Demographic Profile of Garden Theme Attraction Visitors
Relative to All Canadian Pleasure Travelers

Attribute	Size of Market	Visited a Garden Theme Attraction	Did Not Visit a Garden Theme Attraction ¹	Pleasure Travelers	Index ²
		3,246,208	15,193,301	18,439,508	100
Gender	Male	44.2%	49.8%	48.8%	90
	Female	55.8%	50.2%	51.2%	109
Age of Respondent	18 to 24	10.3%	13.3%	12.8%	81
	25 to 34	17.9%	19.6%	19.3%	93
	35 to 44	19.0%	20.9%	20.5%	92
	45 to 54	21.7%	20.0%	20.3%	107
	55 to 64	17.6%	13.4%	14.1%	124
	65 Plus	13.6%	12.8%	12.9%	105
Average Age		46.2	44.2	44.5	N/A
Marital Status	Not married	30.5%	32.6%	32.2%	95
	Married	69.5%	67.4%	67.8%	103
Parental Status	No children under 18	75.0%	70.3%	71.1%	106
	Children under 18	25.0%	29.7%	28.9%	86
Education	High school or less	26.8%	38.2%	36.2%	74
	Some post-secondary	10.7%	11.3%	11.2%	96
	Post-secondary diploma/certificate	21.5%	22.0%	21.9%	98
	University degree	41.0%	28.5%	30.7%	134
Household Income	Under \$20,000	4.4%	6.0%	5.7%	78
	\$20,000 to \$39,999	13.3%	14.7%	14.5%	92
	\$40,000 to \$59,999	16.9%	16.5%	16.5%	102
	\$60,000 to \$79,999	17.0%	14.9%	15.2%	111
	\$80,000 to \$99,999	11.7%	12.3%	12.2%	96
	\$100,000 or more	26.2%	22.1%	22.8%	115
	Not stated	10.5%	13.5%	13.0%	81
Average Household Income		\$76,029	\$72,121	\$72,829	N/A

- 1 - "Non-Garden Attraction Visitors" 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 visit a garden theme attraction on any trip. The number of Visitors and Non-Visitors equals the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Garden Theme Attraction Visitors in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Visitors 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)

Garden Theme Attraction Visitors are relatively active travelers. While they were only the 15th most likely of the 21 culture and entertainment activity types to have taken a trip within their own province or region (89.7%), they were the 9th most likely to have traveled to an adjacent province or region (57.2%) and the 7th most likely to have visited a non-adjacent province or region (41.5%) in the past two years. Ontario (57.8%), Quebec (47.3%) and British Columbia (41.2%) were the most common destinations. However, in relative terms, they were especially over-represented among travelers to the Northwest Territories, the Yukon, Prince Edward Island and British Columbia.

In terms of out-of-country travel, they were the 11th most likely to have visited the United States (59.8%), the 9th most likely to have visited Mexico (13.8%), the 9th most likely to have taken a trip to the Caribbean (18.2%) and the 4th most likely to have traveled overseas in the last two years.

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

	Visited a Garden Theme Attraction	Did Not Visit a Garden Theme Attraction	Pleasure Travelers	Index
Size of Market	3,246,208	15,193,301	18,439,508	100
Canada	96.9%	94.3%	94.8%	102
Took a trip within own province / region	89.6%	85.0%	85.9%	104
Took a trip to an adjacent province / region	57.2%	46.7%	48.6%	118
Took a trip to non-adjacent province / region	41.5%	29.3%	31.4%	132
Newfoundland and Labrador	5.0%	4.2%	4.3%	117
Prince Edward Island	10.2%	6.5%	7.2%	142
New Brunswick	15.1%	11.1%	11.8%	128
Nova Scotia	16.7%	11.8%	12.7%	132
Quebec	47.3%	37.1%	38.9%	122
Ontario	57.8%	52.6%	53.5%	108
Manitoba	11.2%	8.7%	9.2%	122
Saskatchewan	13.0%	11.1%	11.4%	114
Alberta	30.7%	24.8%	25.8%	119
British Columbia	41.2%	28.4%	30.6%	134
Yukon	1.6%	0.9%	1.0%	160
Northwest Territories	1.2%	0.6%	0.7%	174
Nunavut	0.4%	0.3%	0.3%	125
United States	59.3%	48.8%	50.7%	117
Mexico	13.8%	12.1%	12.4%	111
Caribbean	18.2%	15.0%	15.6%	117
All other destinations	36.0%	21.0%	23.6%	152

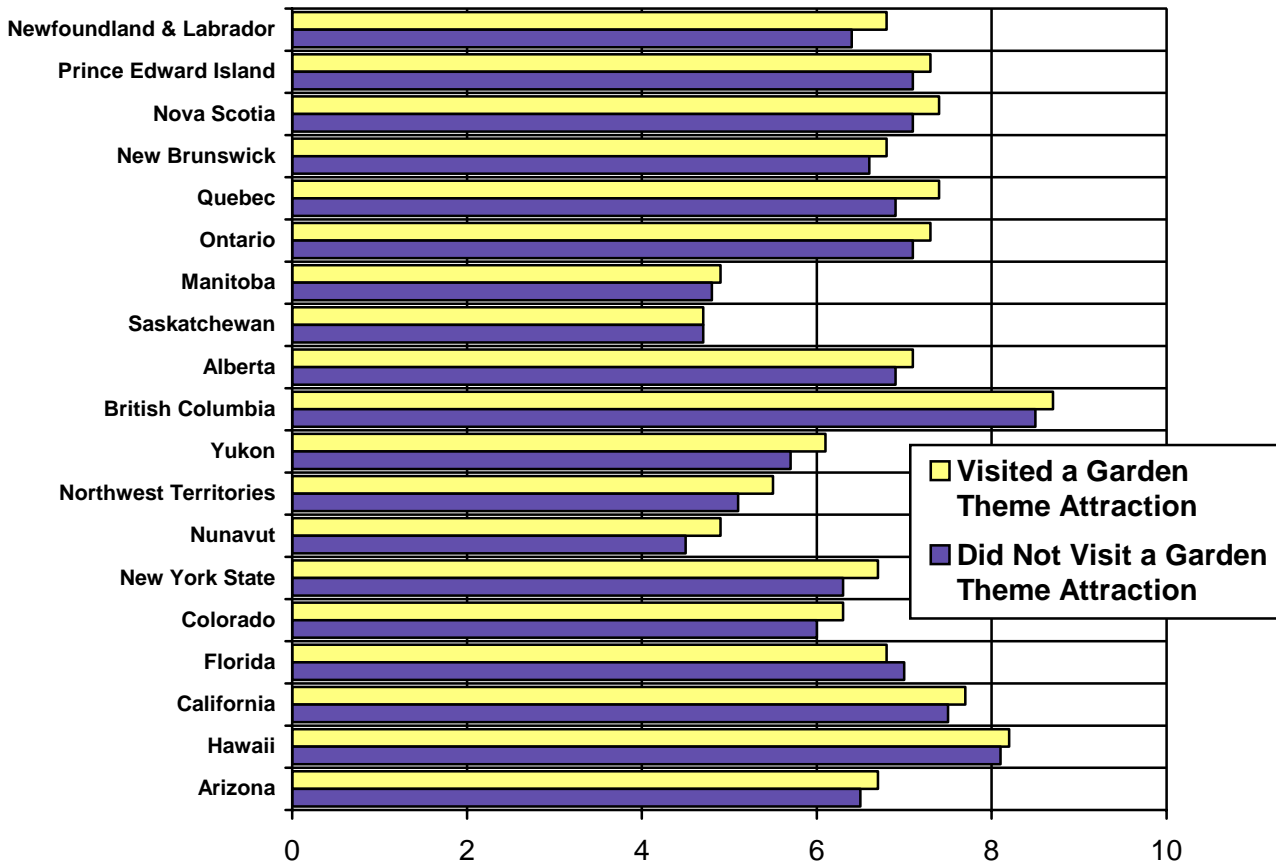
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Garden Theme Attraction Visitors have a more favourable impression of most Canadian destinations than do other Canadian Pleasure Travelers. British Columbia (8.7) was considered the most appealing destination. However, this activity segment was especially likely to have a more favourable impression of Quebec, Newfoundland / Labrador and the Northern Territories relative to other Canadian Pleasure Travelers.

Garden Theme Attraction Visitors also had a more favourable impression than others of New York State and Colorado. Overall, Hawaii (8.2) and California (7.7) were perceived as the most attractive U.S. destinations 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 Culture and Entertainment Activities Pursued While on Trips

Garden Theme Attraction Visitors were more much active than the average Canadian Pleasure Traveler in culture and entertainment pursuits while on trips. They frequently went shopping and dining and visited historic sites, museums and art galleries, theme parks and exhibits and fairs and festivals. Reflecting their interest in learning experiences, this activity segment was especially likely to take part in participatory activities (e.g., participatory historical activities, aboriginal cultural experiences, agro-tourism, wine, beer and food tastings) and to visit educational exhibits and attractions while on trips (e.g., science & technology exhibits, literary & film festivals). They were also more likely than others to attend live art performances (e.g., live theatre, high art performances, comedy festivals & clubs) while traveling.

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

	Visited a Garden Theme Attraction	Did Not Visit a Garden Theme Attraction	Pleasure Travelers	Index
Size of Market	3,246,208	15,193,301	18,439,508	100
Shopping & Dining	95.6%	80.2%	82.9%	115
Historical Sites, Museums & Art Galleries	86.5%	52.3%	58.3%	148
Theme Parks & Exhibits	65.8%	33.5%	39.2%	168
Fairs & Festivals	61.2%	32.7%	37.7%	162
Musical Concerts, Festivals & Attractions	51.8%	28.7%	32.7%	158
Science & Technology Exhibits	45.3%	18.4%	23.1%	196
Wine, Beer & Food Tastings	45.1%	19.3%	23.8%	189
Live Theatre	36.4%	17.8%	21.1%	173
Casinos	34.1%	24.2%	25.9%	132
Agro-Tourism	27.7%	13.1%	15.7%	177
Aboriginal Cultural Experiences	24.0%	8.9%	11.6%	207
High Art Performances	23.3%	8.3%	11.0%	213
Professional Sporting Events	20.7%	14.6%	15.7%	132
Comedy Festivals & Clubs	19.5%	8.1%	10.1%	192
Spas	16.9%	8.6%	10.0%	168
Amateur Tournaments	15.6%	11.0%	11.8%	132
Participatory Historical Activities	15.0%	4.9%	6.7%	225
Equestrian & Western Events	11.5%	5.6%	6.7%	173
Literary & Film Festivals	6.6%	1.7%	2.6%	258
National & International Sporting Events	5.9%	2.6%	3.2%	183

Culture and Entertainment Activities Pursued in a Typical Year

Garden Theme Attraction Visitors are also very active in culture and entertainment activities while not traveling. They frequently dine in local restaurants and attend local festivals and fairs. Relative to other Canadian Pleasure Travelers, they are especially likely to patronize local live art performances (e.g., classical music concerts, ballet, opera, jazz clubs) and to visit local educational attractions (e.g., local botanical gardens, local art galleries and art shows, local museums, local historical sites and heritage buildings, zoos and aquariums). By contrast, they are less likely to attend local sporting events or gamble in local casinos.

Fig. 7 Culture and Entertainment Activities Pursued in a Typical Year

	Visited a Garden Theme Attraction	Did Not Visit a Garden Theme Attraction	Pleasure Travelers	Index
Size of Market	3,246,208	15,193,301	18,439,508	100
Going out to eat in restaurants	94.8%	90.8%	91.5%	104
Going to festivals or fairs	70.3%	59.6%	61.4%	114
Going to historic sites or heritage buildings	55.7%	35.8%	39.3%	142
Going to botanical gardens	52.0%	19.7%	25.4%	205
Going to museums	50.7%	28.9%	32.7%	155
Going to pick-your-own farms or farmers' market	50.6%	38.9%	41.0%	123
Going to art galleries or art shows	50.3%	27.8%	31.8%	158
Going to live theatre	46.6%	32.3%	34.8%	134
Going to zoos or aquariums	41.8%	28.0%	30.4%	137
Going to amateur sporting events	40.9%	42.2%	42.0%	98
Going dancing	34.0%	29.0%	29.9%	114
Going to amusement or theme parks	32.9%	28.0%	28.9%	114
Going to professional sporting events	30.5%	32.4%	32.1%	95
Going to bars with live pop or rock bands	28.9%	27.5%	27.7%	104
Going to classical music concerts	28.5%	13.9%	16.5%	173
Going to rock music concerts	22.1%	22.5%	22.4%	99
Going to day spas	19.6%	12.5%	13.8%	143
Going to gamble in casinos	16.3%	18.5%	18.1%	90
Going to the ballet	13.0%	6.1%	7.3%	179
Staying overnight in a hotel or B&B in own city	12.9%	9.2%	9.9%	131
Going to the opera	12.4%	5.4%	6.6%	188
Going to jazz clubs	12.2%	6.5%	7.5%	163
Going to rodeos	7.9%	7.2%	7.3%	108

Outdoor Activities Pursued While on Trips

Garden Theme Attraction Visitors were also very active in outdoor activities while on trips. They frequently took part in nature-oriented activities such as wildlife viewing and hiking, climbing and paddling while on trips. Relative to the average Canadian Pleasure Traveler, Garden Theme Attraction Visitors were also especially likely to participate in fitness-related activities (e.g., exercising & jogging, cycling, cross-country skiing & snowshoeing). On the other hand, they were less likely than others to go hunting while on trips.

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

	Visited a Garden Theme Attraction	Did Not Visit a Garden Theme Attraction	Pleasure Travelers	Index
Size of Market	3,246,208	15,193,301	18,439,508	100
Wildlife Viewing	66.6%	35.8%	41.2%	161
Ocean Activities (e.g., swimming in ocean, sunbathing)	58.8%	46.3%	48.5%	121
Hiking, Climbing & Paddling	50.7%	30.5%	34.1%	149
Boating & Swimming (e.g., motorboating, swimming in lakes)	48.1%	39.6%	41.1%	117
Sports & Games (e.g., tennis, board games)	31.9%	20.7%	22.7%	140
Fishing	25.5%	23.2%	23.6%	108
Exercising & Jogging	25.3%	13.9%	15.9%	159
Cycling	22.9%	11.5%	13.5%	169
Golfing	20.3%	17.9%	18.3%	111
Downhill Skiing & Snowboarding	19.9%	13.5%	14.6%	136
Skating (e.g., ice skating, rollerblading)	18.4%	10.6%	12.0%	154
Cross-country Skiing & Snowshoeing	17.1%	7.6%	9.3%	184
Team Sports (e.g., hockey, baseball)	12.4%	11.1%	11.4%	109
Snowmobiling & ATVing	11.2%	11.4%	11.3%	98
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	9.7%	5.6%	6.3%	154
Horseback Riding	8.0%	4.2%	4.9%	164
Wilderness Activities (e.g., wilderness skills course)	5.2%	1.8%	2.4%	220
Freshwater Scuba & Snorkeling	4.5%	2.7%	3.0%	149
Motorcycling	3.0%	3.0%	3.0%	102
Hunting	3.0%	5.1%	4.7%	63
Extreme Air Sports (e.g., parachuting)	2.1%	0.9%	1.1%	184

Outdoor Activities Pursued in a Typical Year

The enthusiasm that Garden Theme Attraction Visitors have for nature and fitness is also apparent in their outdoor activities while not traveling. Relative to other Canadian Pleasure Travelers, Garden Theme Attraction Visitors are especially likely to take part in nature-oriented activities such as canoeing and kayaking, hiking, horseback riding and gardening. They are also more likely than others to participate in fitness activities including cross country skiing and downhill skiing, exercise and jogging and racquet sports. On the other hand they are less likely than others to go fishing and hunting, to play golf or team sports, to skateboard or to go ATVing or snowmobiling.

Fig. 9 Outdoor Activities Pursued in a Typical Year

	Visited a Garden Theme Attraction	Did Not Visit a Garden Theme Attraction	Pleasure Travelers	Index
Size of Market	3,246,208	15,193,301	18,439,508	100
Day outing to a park	77.7%	64.6%	66.9%	116
Gardening	69.8%	57.6%	59.8%	117
Exercising at home or at a fitness club	66.0%	59.9%	61.0%	108
Swimming	64.3%	59.4%	60.3%	107
Picnicking	63.5%	50.8%	53.1%	120
Hiking	62.0%	46.0%	48.8%	127
Cycling	49.1%	43.3%	44.3%	111
Camping	38.3%	38.7%	38.6%	99
Ice-skating	29.0%	28.4%	28.5%	102
Jogging	28.1%	23.2%	24.1%	117
Fishing	27.6%	29.6%	29.3%	94
Golfing	27.0%	29.9%	29.4%	92
Sailing or other boating	24.7%	23.2%	23.4%	105
Playing racquet sports (e.g., tennis or badminton)	23.9%	18.1%	19.1%	125
Canoeing or kayaking	23.2%	15.5%	16.9%	137
Playing team sports	20.7%	23.4%	22.9%	90
Downhill skiing	20.0%	15.4%	16.2%	123
Cross-country skiing	17.1%	11.5%	12.5%	137
Rollerblading	15.0%	14.2%	14.4%	105
Riding an all-terrain vehicle (ATV)	11.0%	15.0%	14.3%	77
Horseback riding	8.5%	6.5%	6.8%	125
Snowmobiling	6.7%	10.4%	9.8%	68
Snowboarding	5.0%	5.0%	5.0%	100
Hunting	4.3%	8.5%	7.7%	56
Skateboarding	1.5%	1.6%	1.6%	94

Accommodation Stayed In While on a Trip

Garden Theme Attraction Visitors most often stayed at resorts (e.g., lakeside or riverside resorts, seaside resorts) or public and private campgrounds during the last two years. However, relative to the average Canadian Pleasure Traveler, they were also particularly more likely to stay at accommodation in a wilderness or rural setting (e.g., wilderness lodges, farm and guest ranch). They were also more likely than other Canadian Pleasure Travelers to have stayed in accommodation that specializes in fine cuisine (e.g., country inn or resort with a gourmet restaurant, cooking school, wine tasting school).

Fig. 10 Accommodation Stayed in While on Trips

	Visited a Garden Theme Attraction	Did Not Visit a Garden Theme Attraction	Pleasure Travelers	Index
Size of Market	3,246,208	15,193,301	18,439,508	100
Lakeside / Riverside Resort	33.8%	19.8%	22.3%	152
A Public Campground in a National, State, Provincial or Municipal Park	33.1%	24.9%	26.4%	126
Seaside Resort	32.3%	18.3%	20.7%	156
A Private Campground	22.8%	17.9%	18.8%	122
Ski Resort or Mountain Resort	20.4%	12.6%	13.9%	147
A Camp Site in a Wilderness Setting (Not a Campground)	11.5%	8.0%	8.6%	134
Health Spa	9.5%	5.2%	5.9%	159
Country Inn or Resort with Gourmet Restaurant	9.1%	4.2%	5.1%	179
Wilderness Lodge You Can Drive to by Car	8.8%	4.9%	5.6%	157
Farm or Guest Ranch	6.2%	2.4%	3.0%	205
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	6.2%	4.1%	4.5%	138
Remote or Fly-In Wilderness Lodge	2.5%	1.4%	1.6%	159
On a Houseboat	2.1%	1.2%	1.4%	153
Remote or Fly-In Wilderness Outpost	0.8%	0.5%	0.6%	149
Cooking School	0.6%	0.3%	0.4%	177
Wine Tasting School	0.4%	0.2%	0.3%	150

Tours and Cruises Taken During Past Two Years

Garden Theme Attraction Visitors were more likely than the average Canadian Pleasure Traveler to have taken most types of tours or cruises in the past two years. Self-guided and organized sameday tours, city tours and countryside drives were the most common tours taken. However, relative to the average Canadian Pleasure Traveler, this activity segment was especially likely to take overnight, multi-location guided tours, tours of factories and wineries and air tours in an airplane or helicopter. They were also more likely than others to have taken ocean cruises (e.g., a Caribbean cruise, an Alaskan cruise) and freshwater cruises (e.g., St. Lawrence River cruise, Great Lakes cruise) during the past two years.

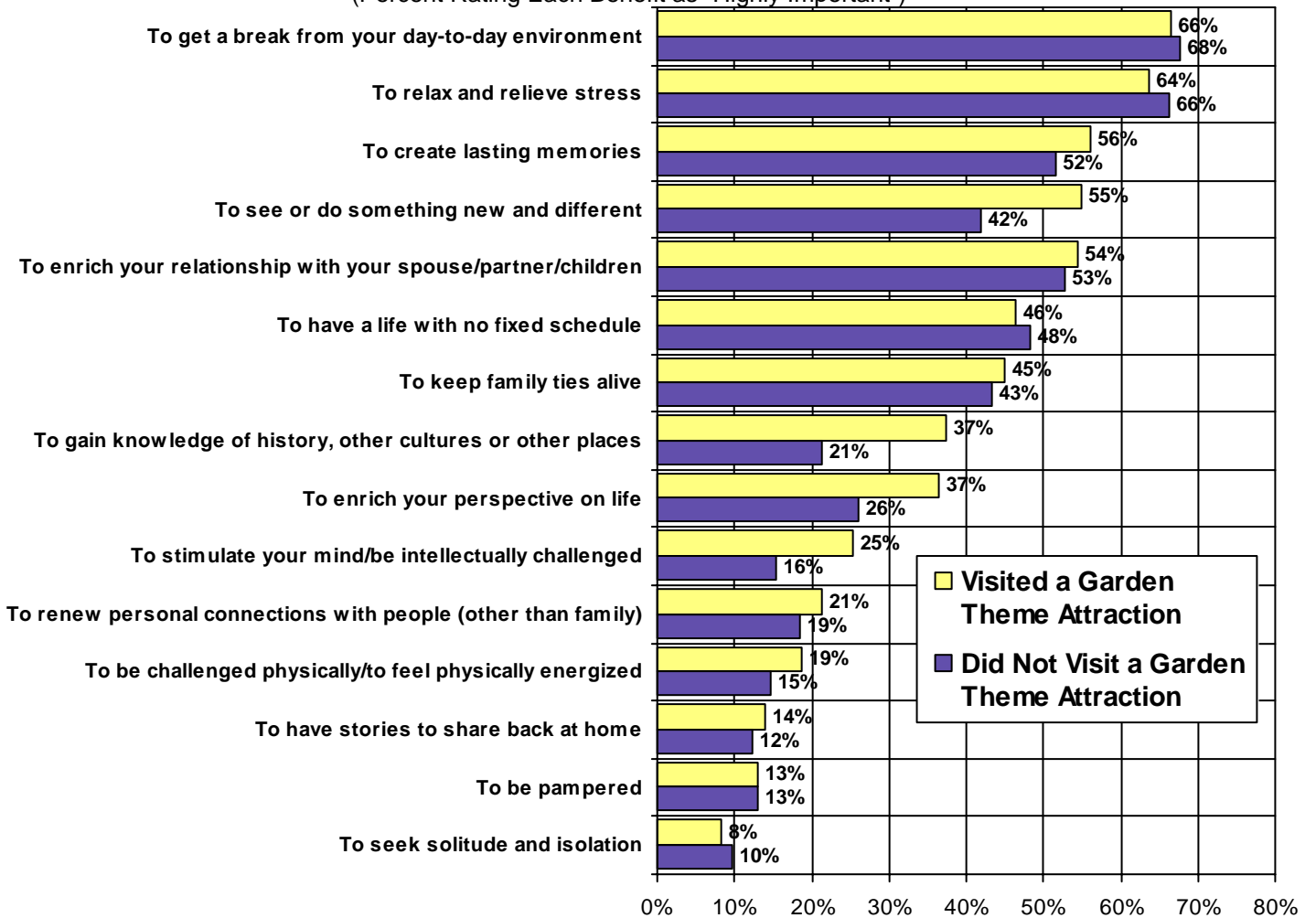
Fig. 11 Tours and Cruises Taken During Past Two Years

	Visited a Garden Theme Attraction	Did Not Visit a Garden Theme Attraction	Pleasure Travelers	Index
Size of Market	3,246,208	15,193,301	18,439,508	100
A self-guided, sameday tour while on an overnight trip	45.3%	25.9%	29.3%	155
Around the city	37.3%	20.4%	23.4%	160
Around the countryside - scenic drives	37.3%	19.3%	22.4%	166
An organized, sameday, guided tour while on an overnight trip	34.3%	19.6%	22.2%	154
A self-guided, overnight tour where you stayed in different locations	32.3%	15.1%	18.1%	178
On the water (sightseeing cruise)	24.1%	10.7%	13.1%	184
Wilderness tour	22.6%	11.0%	13.0%	174
An organized, overnight, guided tour where you stayed in different locations	18.8%	8.2%	10.1%	186
Some other type of tour	16.6%	8.4%	9.8%	168
An organized, overnight, guided tour where you stayed in a single location	13.4%	6.6%	7.8%	171
To a winery	12.5%	4.2%	5.6%	221
To a casino	10.8%	5.6%	6.5%	166
Caribbean ocean cruise	7.6%	4.9%	5.4%	141
Ocean cruise – Other	5.9%	2.8%	3.3%	179
To a factory	5.9%	2.0%	2.6%	223
Cruise on another lake or river	4.3%	2.0%	2.4%	180
In the air as a pilot or passenger of an airplane or helicopter	4.2%	1.4%	1.9%	221
Cruise on the St. Lawrence River	3.6%	1.6%	1.9%	184
Some other type of cruise	3.4%	1.2%	1.6%	211
Alaskan ocean cruise	2.7%	1.4%	1.6%	164
Great Lakes cruise	1.2%	0.7%	0.8%	158
Submarine cruise	0.2%	0.1%	0.1%	157

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travelers, those who visited a garden theme attraction while on trips take vacations to get a break from their day-to-day environment, to relax and relieve stress, to create lasting memories, to see or do something new and different and to enrich family relationships. However, relative to other Canadian Pleasure Travelers, Garden Theme Attraction Visitors are especially likely to seek vacations that offer novelty (e.g., seeing or doing something new and different) and opportunities to learn (e.g., learn about the history and culture of a destination, enrich their perspective on life).

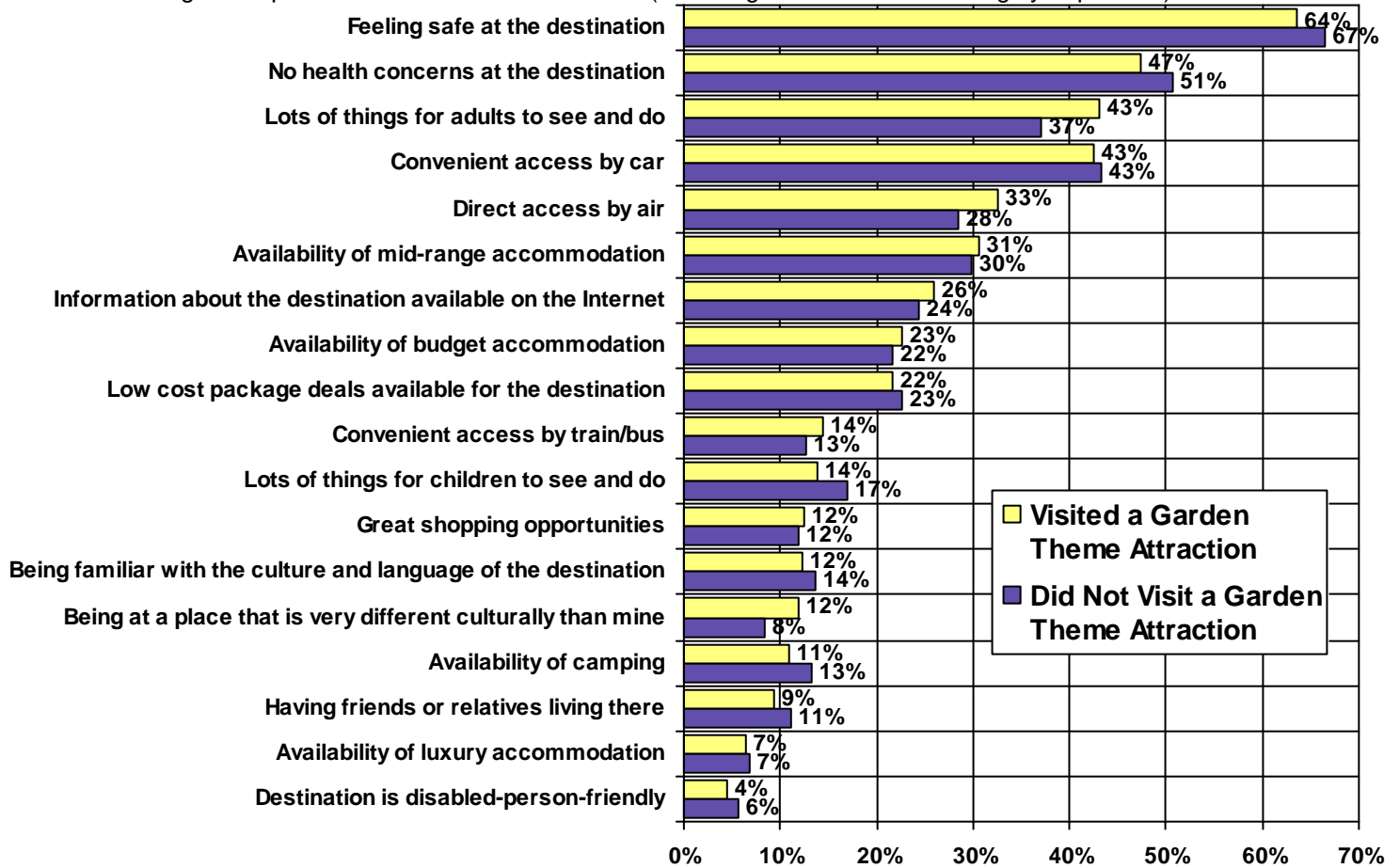
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, those who visited a garden theme attraction consider it important that they feel safe at a destination and that the destination has no health concerns. However, relative to the average Canadian Pleasure Traveler, this segment is more likely to be attracted to destinations that offer lots of things for adults to see and do, direct access by air and a distinctive culture.

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



How Destinations are Selected

Similar to the average Canadian Pleasure Traveler, Garden Attraction Visitors tend to start planning vacations with a particular destination in mind. However, this activity segment may exhibit above-average responsiveness to discount summer vacation package.

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

	Visited a Garden Theme Attraction	Did Not Visit a Garden Theme Attraction	Pleasure Travelers	Index
Size of Market	3,246,208	15,193,301	18,439,508	100
Summer				
Started with a desired destination in mind	52.2%	47.6%	48.5%	108
Started by considering specific activities wanted to do	12.1%	14.2%	13.8%	88
Started with a certain type of vacation experience in mind	23.4%	23.8%	23.7%	99
Looked for packaged deals - no destination in mind	2.0%	1.2%	1.3%	149
Considered something else first	4.2%	4.3%	4.3%	98
Don't know / Other	6.1%	8.9%	8.4%	73
Winter				
Started with a desired destination in mind	50.9%	48.1%	48.6%	105
Started by considering specific activities wanted to do	16.0%	15.5%	15.6%	103
Started with a certain type of vacation experience in mind	18.7%	19.4%	19.3%	97
Looked for packaged deals - no destination in mind	3.4%	3.2%	3.2%	107
Considered something else first	4.4%	4.7%	4.7%	94
Don't know / Other	6.5%	9.1%	8.6%	76

Trip Planning and Information Sources Consulted

The majority of Garden Theme Attraction Visitors were responsible for planning their trips either on their own (43.9%) or with someone else (16.5%). When making vacation plans, Garden Theme Attraction Visitors consult a much wider variety of sources than the average Canadian Pleasure Traveler. The majority use Internet websites, word-of-mouth and past experiences as sources for travel information. They are especially likely to obtain trip planning information from official travel guides or brochures, travel guidebooks such as Fodor’s, travel information received in the mail or by email, television programs and trade, travel or sports shows.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Visited a Garden Theme Attraction	Did Not Visit a Garden Theme Attraction	Pleasure Travelers	Index
Size of Market		3,246,208	15,193,301	18,439,508	100
Who Plans Trips?	Respondent plans trips	43.9%	41.6%	42.0%	104
	Trip planning a shared responsibility	16.5%	16.4%	16.4%	101
	Someone else plans trips	39.6%	42.0%	41.5%	95
Information Sources Consulted	An Internet website	73.7%	63.4%	65.2%	113
	Advice of others / Word-of-mouth	59.3%	49.3%	51.1%	116
	Past experience / Been there before	58.4%	48.6%	50.4%	116
	Maps	44.1%	30.0%	32.6%	135
	A travel agent	43.6%	32.0%	34.1%	128
	Official travel guides or brochures from state / province	43.1%	22.1%	26.0%	166
	Visitor information centres	37.3%	20.3%	23.4%	159
	Articles in newspapers / magazines	33.3%	18.1%	20.9%	160
	An auto club such as CAA	26.3%	15.7%	17.7%	149
	Travel guide books such as Fodor's	24.1%	11.3%	13.6%	177
	Advertisements in newspapers / magazines	22.7%	12.4%	14.3%	159
	Travel information received in the mail	16.1%	7.2%	8.8%	182
	Programs on television	13.5%	6.2%	7.5%	180
	Advertisements on television	8.0%	4.3%	5.0%	160
	An electronic newsletter or magazine received by e-mail	7.5%	3.4%	4.2%	180
Visits to trade, travel or sports shows	5.4%	2.6%	3.1%	174	

Use of the Internet to Plan and Arrange Trips

Relative to the other culture and entertainment activity types, those who visited garden theme attractions are average users of the Internet to plan or book travel. They were the 12th most likely to use the Internet to plan travel (68.5%) and the 9th most likely to book trip components (47.3%) online. The majority use hotel or resort websites, the official tourism websites of countries, regions or cities, airline websites and travel planning and booking websites such as Expedia. They are also more likely than others to visit the websites of specific attractions, cruise lines and motorcoach lines. The most commonly booked trip components online were accommodation and airline tickets. However, they are more likely than others to buy tickets for specific activities or attractions and to make transportation arrangements (e.g., booking a car rental, purchasing tickets for rail, bus or boat/ship fares) through the Internet.

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

		Visited a Garden Theme Attraction	Did Not Visit a Garden Theme Attraction	Pleasure Travelers	Index
	Size of Market	3,246,208	15,193,301	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	31.4%	42.8%	40.8%	77
	Uses Internet to plan trips only	21.2%	22.3%	22.1%	96
	Uses Internet to book part of trip	47.3%	34.8%	37.0%	128
Types of Websites Consulted	A website of a hotel or resort	64.0%	55.2%	57.0%	112
	A tourism website of a country / region / city	59.2%	47.4%	49.8%	119
	An airline website	53.8%	44.4%	46.3%	116
	A travel planning/booking website	51.5%	44.2%	45.7%	113
	A website of an attraction	46.0%	31.5%	34.5%	133
	Some other website	29.7%	27.0%	27.6%	108
	A cruise line website	10.8%	7.4%	8.1%	134
	A motorcoach website	4.0%	2.1%	2.5%	163
Parts of Trips Booked Over The Internet	Accommodation	78.1%	66.6%	69.2%	113
	Air tickets	75.7%	67.7%	69.5%	109
	Car rental	36.5%	24.4%	27.1%	135
	Tickets or fees for specific activities or attractions	31.1%	21.5%	23.6%	132
	Tickets for rail, bus or boat/ship fares	20.8%	13.7%	15.3%	136
	A package containing two or more items	17.2%	14.9%	15.4%	112
	Other	5.3%	3.5%	3.9%	135

Media Consumption Habits

Garden Theme Attraction Visitors are more likely than the average Canadian Pleasure Traveler to consume travel-related media including the travel sections of newspapers, travel magazines, travel websites and travel television shows. They may also be effectively targeted those city lifestyle magazines, ‘home and garden’ media (e.g., home & garden television shows, house & home websites) and science and nature magazines. They most often listen to multicultural, classical music radio and jazz / big band radio stations.

Fig. 17 Media Consumption Habits

		Visited a Garden Theme Attraction	Did Not Visit a Garden Theme Attraction	Pleasure Travelers	Index
	Size of Market	3,246,208	15,193,301	18,439,508	100
Newspaper Readership	Reads daily newspaper	90.6%	86.6%	87.3%	104
	Reads weekend edition of newspaper	90.9%	86.5%	87.3%	104
	Reads local neighbourhood or community newspapers	68.1%	60.1%	61.5%	111
	Reads other types of newspapers	24.3%	15.6%	17.2%	142
	Frequently or occasionally reads travel section of daily newspaper	57.1%	43.3%	45.7%	125
	Frequently or occasionally reads travel section of weekend newspaper	59.7%	44.7%	47.3%	126
Types of Magazines Read (Top 5 Indexed)	Travel (e.g., Condé Nast)	18.9%	10.2%	11.8%	161
	Magazines about your city	18.9%	10.5%	12.0%	157
	Science and geography	25.6%	14.7%	16.6%	154
	Photography and video	6.1%	3.6%	4.1%	152
	Regional magazines	11.4%	7.1%	7.9%	144
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	39.0%	28.5%	30.3%	129
	Shopping channels	5.8%	4.3%	4.6%	125
	Home & garden shows	40.9%	32.7%	34.2%	120
	Science & nature shows	50.8%	42.4%	43.8%	116
	History	47.3%	40.6%	41.8%	113
Type of Radio Programs Listened To (Top 5 Indexed)	Multicultural	12.7%	7.4%	8.4%	152
	Classical music	26.0%	15.4%	17.2%	151
	Jazz / Big band	13.2%	7.8%	8.8%	150
	News / Talk / Information	48.8%	37.4%	39.4%	124
	Soft music / Adult contemporary	31.5%	24.5%	25.7%	122
Types of Websites Visited (Top 5 Indexed)	Travel	62.7%	47.8%	50.6%	124
	Magazine sites	19.8%	15.9%	16.6%	119
	Newspaper sites	37.5%	30.5%	31.8%	118
	Network news sites (e.g., CBC, CNN)	41.4%	35.0%	36.1%	114
	House and home	31.2%	27.5%	28.1%	111

Appendix One		
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 One		
Canadian TAMS 2006 Culture and Entertainment Segmentation		
Activity Segment	Activities in Segment	
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

Appendix Two: 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	