

CANADIAN TRAVEL MARKET

Golfing While on Trips Of One or More Nights

A Profile Report

October 3, 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



Golfing While on Trips

Executive Summary

Over the last two years, 13.6% (3,377,089) of adult Canadians played golf while on an out-of-town, overnight trip of one or more nights. This was the seventh most frequent outdoor activity type (of the 21 outdoor activity types) undertaken by Canadians while on trips. Of those who golfed, 31.0% (1,048,168) reported that golfing was the main reason for taking at least one trip.

Relative to the average Canadian Pleasure Traveler, Golfers are more likely to be male (65%), middle-aged (35 to 64), married and have dependent children under 18 living at home. This is a relatively affluent segment with an above-average level of education (66.3% have some post-secondary education) and the second highest household income (\$86,733) of the 21 outdoor activity types. Golfers are over-represented in Saskatchewan, Alberta, Manitoba and Ontario.

Golfers traveled frequently during the past two years both within and outside of Canada. They were the most likely of the 21 outdoor activity types to have traveled to the United States (68.5%) and frequently took trips to the Caribbean (22.3% - 6th of the 21 outdoor activity types) and Mexico (19.1% - 7th of the 21 outdoor activity types). Almost all of them took a trip within Canada (97.3%) and especially within their own province/region (89.9%). Relative to the other activity types, Golfers were also especially likely to have taken trips to adjacent provinces/regions (60.3%- 5th of the 21 types) and to non-adjacent provinces/regions (40.5%- 4th of the 21 types).

Relative to the average Canadian Pleasure Traveler, Golfers were very active in outdoor activities while on trips, and especially competitive activities (e.g., games & individual sports, team sports) and high-energy sports (e.g., downhill skiing & snowboarding). Golfers were also much more likely to attend sporting events while on trips. They prefer luxury accommodation and are less likely to seek intellectual and cultural stimulation than entertainment activities such as visits to casinos, spas, comedy festivals and clubs and wineries. Similar to other Canadian Pleasure Travelers, they take vacations to get a break from their day-to-day environment, to relax and relieve stress, to enrich family relationships and to create lasting memories.

Relative to the other outdoor activity segments, Golfers were only slightly more likely to use the Internet to plan (69.8%) and book trips (46.6%) in the past two years. They are also more likely than average to obtain travel-related information from travel agents, automobile associations, electronic newsletters and trade, travel and sports shows. They can be targeted most effectively through sports-related media, travel-related media and business, finance and investing magazines.

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 golfed 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.

Golfing While on Trips

Market Incidence

Over the last two years, 13.6% (3,377,089) of adult Canadians played golf while on an out-of-town, overnight trip of one or more nights. 12.1% reported playing an occasional game of golf while on a trip, while 3.3% went to a golf resort and 1.6% purchased a golf tour package that allowed them to play on several courses. 0.7% (166,841 adult Canadians) participated in all three golfing activities while on trips during the past two years.

Of those who golfed, 31.0% (1,048,168) reported that golfing was the main reason for taking at least one trip in the past two years. The majority of those who purchased a golf tour package to play on various courses (74.0%) and who went to a golf resort for an overnight stay (57.4%) reported that these activities were the main reason for taking at least one trip over the course of the last two years.

Fig. 1 Incidence of Golfing While on Trips¹

	Number of Golfers ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	3,377,089	1,048,168	18,439,508	24,776,103
Golfing (All Activities)	3,377,089	31.0%	18.3%	13.6%
Played an occasional game while on a trip	3,004,661	22.2%	16.3%	12.1%
Played during an overnight stay at a golf resort	816,230	57.4%	4.4%	3.3%
Golf tour package to play on various courses	385,216	74.0%	2.1%	1.6%
Participated in All Three Golfing Activities	166,841	43.7%	0.9%	0.7%

- 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 - "Golfers" are defined as individuals who golfed 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

Relative to the other Canadian Pleasure Travelers, those who went golfing while on trips are more likely to live in Saskatchewan and Alberta, and to a lesser extent, Manitoba and Ontario. They are least likely to live in Quebec.

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

	Total Population	Estimated Number Who Played Golf on a Trip	Percent of Pleasure Travelers in Region Who Golfed on a Trip	Percent of Total Regional Population Who Golfed on a Trip
Canada	24,776,103	3,377,089	18.3%	13.6%
Atlantic Provinces	1,822,494	191,493	15.1%	10.5%
Quebec	5,940,869	555,737	13.2%	9.4%
Ontario	9,671,592	1,381,699	19.3%	14.3%
Manitoba	843,107	117,777	19.8%	14.0%
Saskatchewan	706,325	146,394	27.0%	20.7%
Alberta	2,465,540	518,280	25.8%	21.0%
British Columbia	3,326,176	465,708	17.5%	14.0%

Demographic Profile

Relative to the average Canadian Pleasure Traveler, Golfers are more likely to be male, 35 to 64 years of age, and married. They are slightly more likely than average to have dependent children (less than 18 years of age) living at home. Golfers also tend to be relatively affluent with an above-average level of education (66.3% have some post secondary education; 16th of the 21 outdoor activity types) and the second highest household income (\$86,733) of the 21 outdoor activity types.

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

Attribute	Size of Market	Golfers	Non-Golfers ¹	Pleasure Travelers	Index ²
		3,377,089	15,062,420	18,439,508	100
Gender	Male	65.2%	45.1%	48.8%	134
	Female	34.8%	54.9%	51.2%	68
Age of Respondent	18 to 24	10.7%	13.3%	12.8%	83
	25 to 34	18.1%	19.6%	19.3%	94
	35 to 44	22.1%	20.2%	20.5%	108
	45 to 54	21.7%	20.0%	20.3%	107
	55 to 64	15.6%	13.8%	14.1%	111
	65 Plus	11.8%	13.2%	12.9%	92
Average Age		45.1	44.4	44.5	N/A
Marital Status	Not married	23.9%	34.1%	32.2%	74
	Married	76.1%	65.9%	67.8%	112
Parental Status	No children under 18	69.8%	71.4%	71.1%	98
	Children under 18	30.2%	28.6%	28.9%	104
Education	High school or less	33.7%	36.8%	36.2%	93
	Some post-secondary	10.6%	11.3%	11.2%	95
	Post-secondary diploma/certificate	21.7%	21.9%	21.9%	99
	University degree	34.0%	30.0%	30.7%	111
Household Income	Under \$20,000	3.0%	6.3%	5.7%	52
	\$20,000 to \$39,999	8.7%	15.8%	14.5%	60
	\$40,000 to \$59,999	14.0%	17.1%	16.5%	85
	\$60,000 to \$79,999	13.3%	15.7%	15.2%	87
	\$80,000 to \$99,999	14.5%	11.7%	12.2%	119
	\$100,000 or more	36.8%	19.7%	22.8%	161
	Not stated	9.8%	13.7%	13.0%	75
Average Household Income		\$86,733	\$69,570	\$72,829	N/A

- 1 - "Non-Golfers" 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 play golf on any trip. The number of Golfers and Non-Golfers equals the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Golfers in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Golfers 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 Golfers (97.4%) took an overnight trip within Canada (97.3%) during the past two years. They were especially likely to have taken a trip within their own province / region (89.9%). However, relative to the other outdoor activity types, Golfers were more likely to have taken trips to adjacent provinces/regions (60.3%- 5th of the 21 outdoor activity types) and to non-adjacent provinces/regions (40.5%- 4th of the 21 outdoor activity types).

Golfers most often visited Ontario (60.5%), Quebec (40.4%), British Columbia (40.2%) and Alberta (36.8%). In relative terms, they were especially likely to take trips in the western provinces including Manitoba, Saskatchewan, Alberta and British Columbia. This partly reflects the over-representation of golfers in Saskatchewan and Alberta.

They were the most likely of the 21 outdoor activity types to have traveled to the United States (68.5%) and frequently took trips to the Caribbean (22.3% - 6th of the 21 outdoor activity types) and Mexico (19.1% - 7th of the 21 outdoor activity types).

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

	Golfers	Non-Golfers	Pleasure Travelers	Index
Size of Market	3,377,089	15,062,420	18,439,508	100
Canada	97.4%	94.2%	94.8%	103
Took a trip within own province/region	89.9%	84.9%	85.9%	105
Took a trip to an adjacent province/region	60.3%	45.9%	48.6%	124
Took a trip to non-adjacent province/region	40.5%	29.4%	31.4%	129
Newfoundland and Labrador	4.5%	4.3%	4.3%	104
Prince Edward Island	8.8%	6.8%	7.2%	123
New Brunswick	14.0%	11.3%	11.8%	118
Nova Scotia	13.6%	12.5%	12.7%	107
Quebec	40.4%	38.6%	38.9%	104
Ontario	60.5%	51.9%	53.5%	113
Manitoba	13.9%	8.1%	9.2%	152
Saskatchewan	17.9%	10.0%	11.4%	157
Alberta	36.8%	23.4%	25.8%	142
British Columbia	40.2%	28.5%	30.6%	131
Yukon	1.0%	1.0%	1.0%	103
Northwest Territories	0.8%	0.6%	0.7%	126
Nunavut	0.4%	0.3%	0.3%	124
United States	68.5%	46.7%	50.7%	135
Mexico	19.1%	10.9%	12.4%	154
Caribbean	22.3%	14.1%	15.6%	143
All other destinations	25.3%	23.3%	23.6%	107

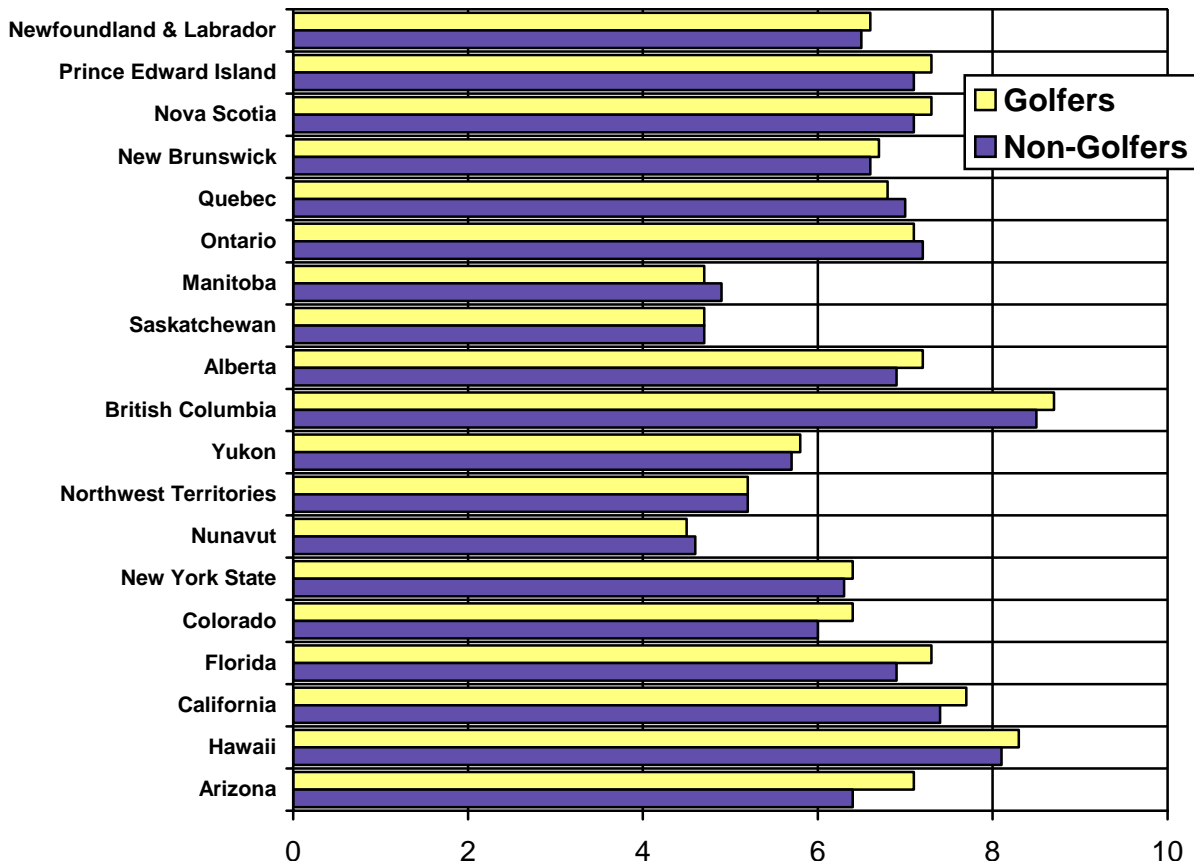
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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 ratings of Golfers were comparable to those of Non-Golfers for most Canadian destinations. In fact, the average rating of Canadian destinations by Golfers was ranked 18th of the 21 outdoor activity types. This suggests that Golfers have a less positive impression of Canadian destinations than other Canadian outdoor activity types. However Golfers did rate British Columbia (8.7) as most appealing overall.

The U.S. reference states were often considered more appealing to Golfers than Non-Golfers, and especially winter get-away states such as Florida, California, Hawaii 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

Golfers were more likely than the average Canadian Pleasure Traveler to participate in all other outdoor activities while on a trip. The majority of Golfers participated in ocean activities (e.g., sunbathing, swimming in ocean), and in boating and swimming activities (e.g., motorboating, swimming in lake) while on trips. Relative to the average Canadian Pleasure Traveler, Golfers were also much more likely to participate in competitive sports (e.g., sports & games, team sports), and to go fishing, skating, downhill skiing and snowboarding, exercising and jogging, sailing and surfing and freshwater scuba and snorkeling while on trips.

In part, this pattern of above-average participation in skilled and physically challenging outdoor activities while on trips reflects the fact that this segment is predominately male and affluent. These attributes tend to be associated with higher levels of outdoor physical activity.

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

	Golfers	Non-Golfers	Pleasure Travelers	Index
Size of Market	3,377,089	15,062,420	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	61.2%	45.7%	48.5%	126
Boating & Swimming (e.g., motorboating, swimming in lakes)	55.0%	38.0%	41.1%	134
Wildlife Viewing	43.1%	40.8%	41.2%	104
Hiking, Climbing & Paddling	38.9%	33.0%	34.1%	114
Sports & Games (e.g., tennis, board games)	37.1%	19.5%	22.7%	163
Fishing	36.1%	20.8%	23.6%	153
Downhill Skiing & Snowboarding	26.3%	12.0%	14.6%	180
Exercising & Jogging	24.5%	13.9%	15.9%	155
Team Sports (e.g., hockey, baseball)	23.8%	8.6%	11.4%	209
Skating	21.4%	9.8%	12.0%	179
Cycling	20.3%	12.0%	13.5%	150
Snowmobiling & ATVing	16.8%	10.1%	11.3%	148
Cross-country Skiing & Snowshoeing	12.1%	8.7%	9.3%	130
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	10.2%	5.4%	6.3%	162
Horseback Riding	6.7%	4.5%	4.9%	137
Hunting	6.1%	4.4%	4.7%	129
Freshwater Scuba & Snorkeling	5.3%	2.5%	3.0%	175
Motorcycling	3.6%	2.9%	3.0%	120
Wilderness Activities (e.g., wilderness skills course)	2.5%	2.3%	2.4%	106
Extreme Air Sports (e.g., parachuting)	1.6%	1.0%	1.1%	140

Outdoor Activities Pursued in a Typical Year

The comparatively high level of activity among Golfers while on trips is also apparent in their outdoor activities while not traveling. In addition to golfing, the majority of Golfers went on day outings to parks, swam, exercised at home or at a fitness club, gardened and went hiking. Relative to the average Canadian Pleasure Traveler, Golfers were particularly likely to participate in competitive sports (e.g., team sports, racket sports), to have gone downhill skiing and snowboarding, and to have gone sailing or boating. They were slightly less likely than average to go picnicking.

Fig. 7 Outdoor Activities Pursued in a Typical Year

	Golfers	Non-Golfers	Pleasure Travelers	Index
Size of Market	3,377,089	15,062,420	18,439,508	100
Golfing	85.4%	16.8%	29.4%	291
Swimming	66.5%	58.9%	60.3%	110
Day outing to a park	66.2%	67.0%	66.9%	99
Exercising at home or at a fitness club	66.0%	59.9%	61.0%	108
Gardening	62.1%	59.2%	59.8%	104
Hiking	54.2%	47.6%	48.8%	111
Cycling	49.6%	43.1%	44.3%	112
Picnicking	49.6%	53.8%	53.1%	93
Camping	41.1%	38.0%	38.6%	107
Fishing	38.2%	27.3%	29.3%	131
Ice-skating	37.5%	26.5%	28.5%	132
Playing team sports	37.3%	19.7%	22.9%	163
Sailing or other boating	32.8%	21.3%	23.4%	140
Jogging	28.8%	23.0%	24.1%	120
Playing racquet sports (e.g., tennis or badminton)	26.5%	17.5%	19.1%	139
Downhill skiing	26.2%	14.0%	16.2%	162
Canoeing or kayaking	20.5%	16.1%	16.9%	121
Rollerblading	17.6%	13.6%	14.4%	123
Cross-country skiing	15.1%	11.9%	12.5%	121
Riding an all-terrain vehicle (ATV)	15.1%	14.1%	14.3%	105
Snowmobiling	11.2%	9.5%	9.8%	114
Hunting	9.4%	7.4%	7.7%	122
Snowboarding	7.2%	4.6%	5.0%	142
Horseback riding	6.7%	6.8%	6.8%	99
Skateboarding	2.6%	1.4%	1.6%	163

Culture and Entertainment Activities Pursued While on Trips

Those who went golfing on an out-of-town overnight trip in the past two years were more active than the average Canadian Pleasure Traveler in almost all culture and entertainment activities while on trips. As with most Canadian Pleasure Travelers, the majority of Golfers went shopping and dining and visited historical sites, museums and art galleries while traveling. However, relative to other Canadian pleasure travelers, Golfers were especially likely to exhibit a preference for entertainment activities such as sporting events (e.g., professional sporting events, amateur tournaments, national & international sporting events), wine, beer and food tastings, comedy festivals and clubs, spa visits and equestrian and western events 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)

	Golfers	Non-Golfers	Pleasure Travelers	Index
Size of Market	3,377,089	15,062,420	18,439,508	100
Shopping & Dining	90.0%	81.3%	82.9%	109
Historical Sites, Museums & Art Galleries	63.0%	57.3%	58.3%	108
Theme Parks & Exhibits	46.8%	37.4%	39.2%	120
Fairs & Festivals	45.6%	35.9%	37.7%	121
Musical Concerts, Festivals & Attractions	41.7%	30.7%	32.7%	127
Casinos	38.7%	23.0%	25.9%	150
Wine, Beer & Food Tastings	34.6%	21.4%	23.8%	145
Professional Sporting Events	34.0%	11.6%	15.7%	217
Science & Technology Exhibits	29.5%	21.7%	23.1%	127
Live Theatre	29.2%	19.3%	21.1%	138
Amateur Tournaments	21.2%	9.7%	11.8%	180
Garden Theme Attractions	19.5%	17.2%	17.6%	111
Agro-Tourism	19.3%	14.9%	15.7%	123
Comedy Festivals & Clubs	16.6%	8.7%	10.1%	163
Spas	15.8%	8.7%	10.0%	158
High Art Performances	13.8%	10.3%	11.0%	126
Aboriginal Cultural Experiences	13.0%	11.3%	11.6%	112
Equestrian & Western Events	11.1%	5.7%	6.7%	166
Participatory Historical Activities	6.6%	6.7%	6.7%	99
National & International Sporting Events	6.3%	2.5%	3.2%	198
Literary & Film Festivals	3.3%	2.4%	2.6%	130

Culture and Entertainment Activities Pursued in a Typical Year

In a typical year, Golfers were more active than the average Canadian Pleasure Traveler in a variety of culture and entertainment pursuits. As with most Canadian Pleasure Travelers, the majority of Golfers dined in restaurants and visited local festivals and fairs. However, Golfers were especially likely to attend both local amateur and professional sporting events and rock music concerts and to visit local casinos. Golfers were less likely than average to visit botanical gardens.

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

	Golfers	Non-Golfers	Pleasure Travelers	Index
Size of Market	3,377,089	15,062,420	18,439,508	100
Going out to eat in restaurants	95.0%	90.7%	91.5%	104
Going to festivals or fairs	63.6%	60.9%	61.4%	104
Going to amateur sporting events	60.6%	37.8%	42.0%	144
Going to professional sporting events	53.4%	27.3%	32.1%	167
Going to pick-your-own farms or farmers' market	41.1%	41.0%	41.0%	100
Going to live theatre	40.9%	33.4%	34.8%	117
Going to historic sites or heritage buildings	38.3%	39.5%	39.3%	97
Going to bars with live pop or rock bands	33.4%	26.4%	27.7%	121
Going to zoos or aquariums	32.7%	29.9%	30.4%	108
Going to art galleries or art shows	32.7%	31.6%	31.8%	103
Going to museums	32.2%	32.8%	32.7%	98
Going dancing	31.1%	29.6%	29.9%	104
Going to rock music concerts	30.8%	20.6%	22.4%	137
Going to amusement or theme parks	29.4%	28.8%	28.9%	102
Going to gamble in casinos	25.6%	16.4%	18.1%	142
Going to botanical gardens	22.3%	26.1%	25.4%	88
Going to day spas	18.0%	12.8%	13.8%	131
Going to classical music concerts	16.7%	16.5%	16.5%	101
Staying overnight in a hotel or B&B in own city	13.1%	9.2%	9.9%	133
Going to jazz clubs	9.7%	7.0%	7.5%	129
Going to rodeos	9.6%	6.8%	7.3%	132
Going to the ballet	7.4%	7.3%	7.3%	102
Going to the opera	6.7%	6.6%	6.6%	102

Accommodation Stayed In While on a Trip

Relative to the average Canadian Pleasure Traveler, Golfers were particularly more likely to stay at resorts when on trips in the last two years. A lakeside or riverside resort was the most common type of accommodation used by Golfers. Public campgrounds were the next most popular type, followed by seaside resorts, private campgrounds, and ski or mountain resorts. Golfers were also more likely to have stayed in some of the more unusual types of accommodation including a remote or fly-in wilderness lodge, and a wine-tasting school.

Fig. 10 Accommodation Stayed in While on Trips

	Golfers	Non-Golfers	Pleasure Travelers	Index
Size of Market	3,377,089	15,062,420	18,439,508	100
Lakeside/Riverside Resort	34.8%	19.5%	22.3%	156
A Public Campground in a National, State, Provincial or Municipal Park	30.5%	25.4%	26.4%	116
Seaside Resort	28.6%	19.0%	20.7%	138
A Private Campground	24.8%	17.4%	18.8%	132
Ski Resort or Mountain Resort	24.7%	11.5%	13.9%	177
A Camp Site in a Wilderness Setting (Not a Campground)	10.0%	8.3%	8.6%	116
Health Spa	8.6%	5.3%	5.9%	145
Wilderness Lodge You Can Drive to by Car	7.8%	5.1%	5.6%	138
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	6.9%	3.9%	4.5%	154
Country Inn or Resort with Gourmet Restaurant	6.4%	4.8%	5.1%	125
Remote or Fly-In Wilderness Lodge	3.6%	1.2%	1.6%	224
Farm or Guest Ranch	3.5%	2.9%	3.0%	114
On a Houseboat	2.3%	1.2%	1.4%	166
Remote or Fly-In Wilderness Outpost	0.9%	0.5%	0.6%	166
Wine Tasting School	0.8%	0.1%	0.3%	323
Cooking School	0.5%	0.3%	0.4%	140

Tours and Cruises Taken During Past Two Years

Golfers were more likely than the average Canadian Pleasure Traveler to take tours or cruises while on trips in the past two years. The types of tours most commonly taken by Golfers were sameday tours (both guided and self-guided), tours around a city and scenic drives in the country. Relative to the average Canadian Pleasure Traveler, Golfers were particularly more likely to have taken a casino tour, a winery tour and an air tour in an airplane or helicopter. Golfers were also more likely than average to take ocean cruises (e.g., a Caribbean cruise, an Alaskan cruise), sightseeing cruises and other specialty cruises.

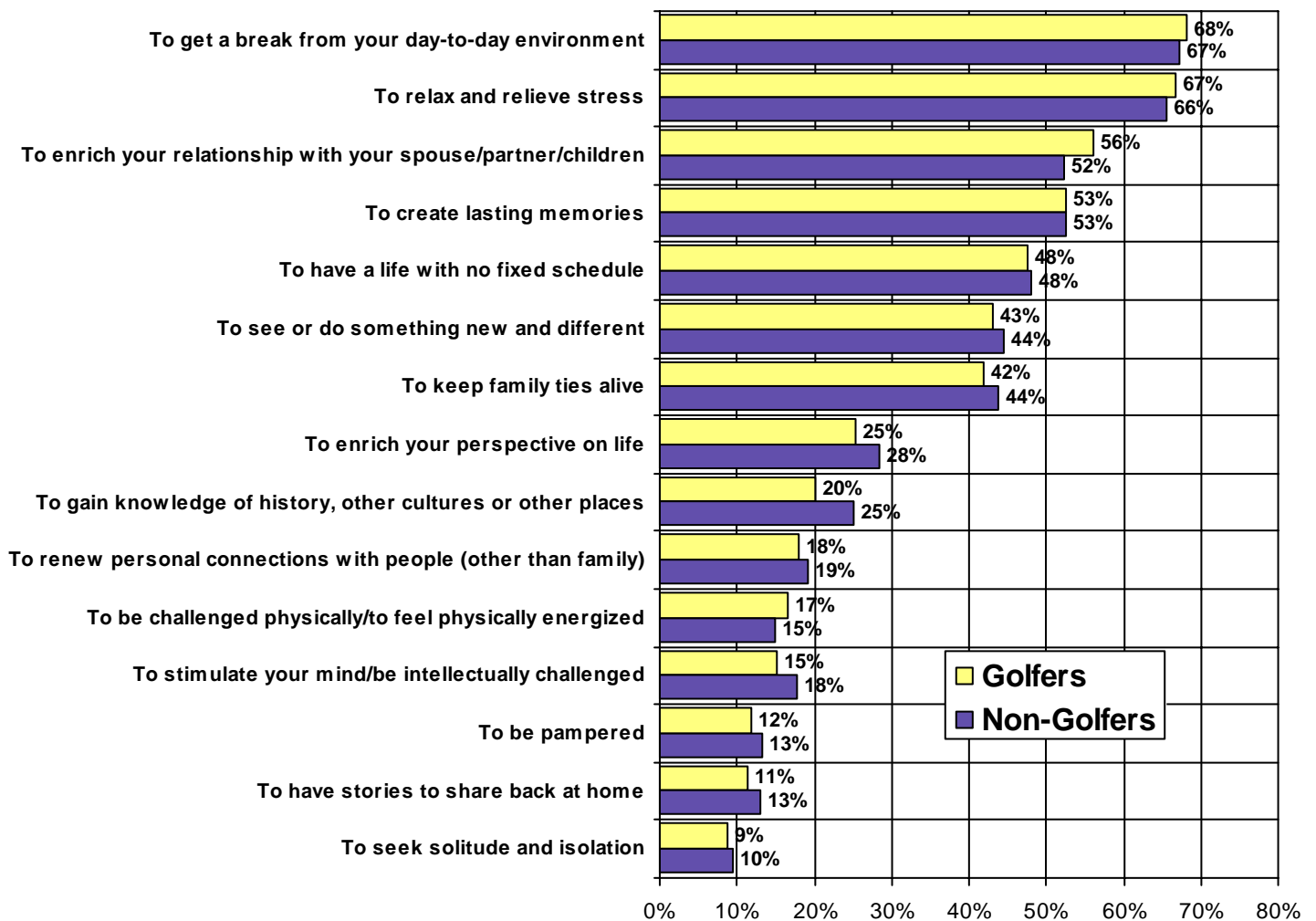
Fig. 11 Tours and Cruises Taken During Past Two Years

	Golfers	Non-Golfers	Pleasure Travelers	Index
Size of Market	3,377,089	15,062,420	18,439,508	100
A self-guided sameday tour while on an overnight trip	34.1%	28.2%	29.3%	116
An organized, sameday guided tour while on an overnight trip	27.6%	21.0%	22.2%	124
Around the city	27.4%	22.5%	23.4%	117
Around the countryside - scenic drives	26.6%	21.5%	22.4%	118
A self-guided, overnight tour where you stayed in different locations	20.8%	17.5%	18.1%	115
On the water (sightseeing cruise)	17.7%	12.0%	13.1%	135
Wilderness tour	14.4%	12.7%	13.0%	110
An organized, overnight, guided tour where you stayed in different locations	11.8%	9.7%	10.1%	117
Some other type of tour	11.5%	9.5%	9.8%	117
An organized, overnight, guided tour where you stayed in a single location	11.2%	7.1%	7.8%	143
To a casino	10.4%	5.7%	6.5%	160
To a winery	9.1%	4.9%	5.6%	161
Caribbean ocean cruise	7.7%	4.9%	5.4%	142
Ocean cruise – Other	5.3%	2.9%	3.3%	159
To a factory	3.6%	2.4%	2.6%	135
Cruise on another lake or river	3.2%	2.2%	2.4%	134
In the air as a pilot or passenger of an airplane or helicopter	2.9%	1.7%	1.9%	153
Some other type of cruise	2.7%	1.4%	1.6%	168
Alaskan ocean cruise	2.1%	1.5%	1.6%	130
Cruise on the St. Lawrence River	1.7%	2.0%	1.9%	88
Great Lakes cruise	1.1%	0.7%	0.8%	140
Submarine cruise	0.2%	0.1%	0.1%	163

Benefits Sought While On a Vacation

Golfers tend to seek the same vacation benefits while on trips as Non-Golfers. Similar to other Canadian Pleasure Travelers, the majority of Golfers take vacations to get a break from their day-to-day environment, to relax and relieve stress, to enrich family relationships and to create lasting memories. Relative to Non-Golfers, Golfers are slightly more likely to take vacations to enrich family relationships and slightly less likely to seek out knowledge concerning the history or culture of a destination.

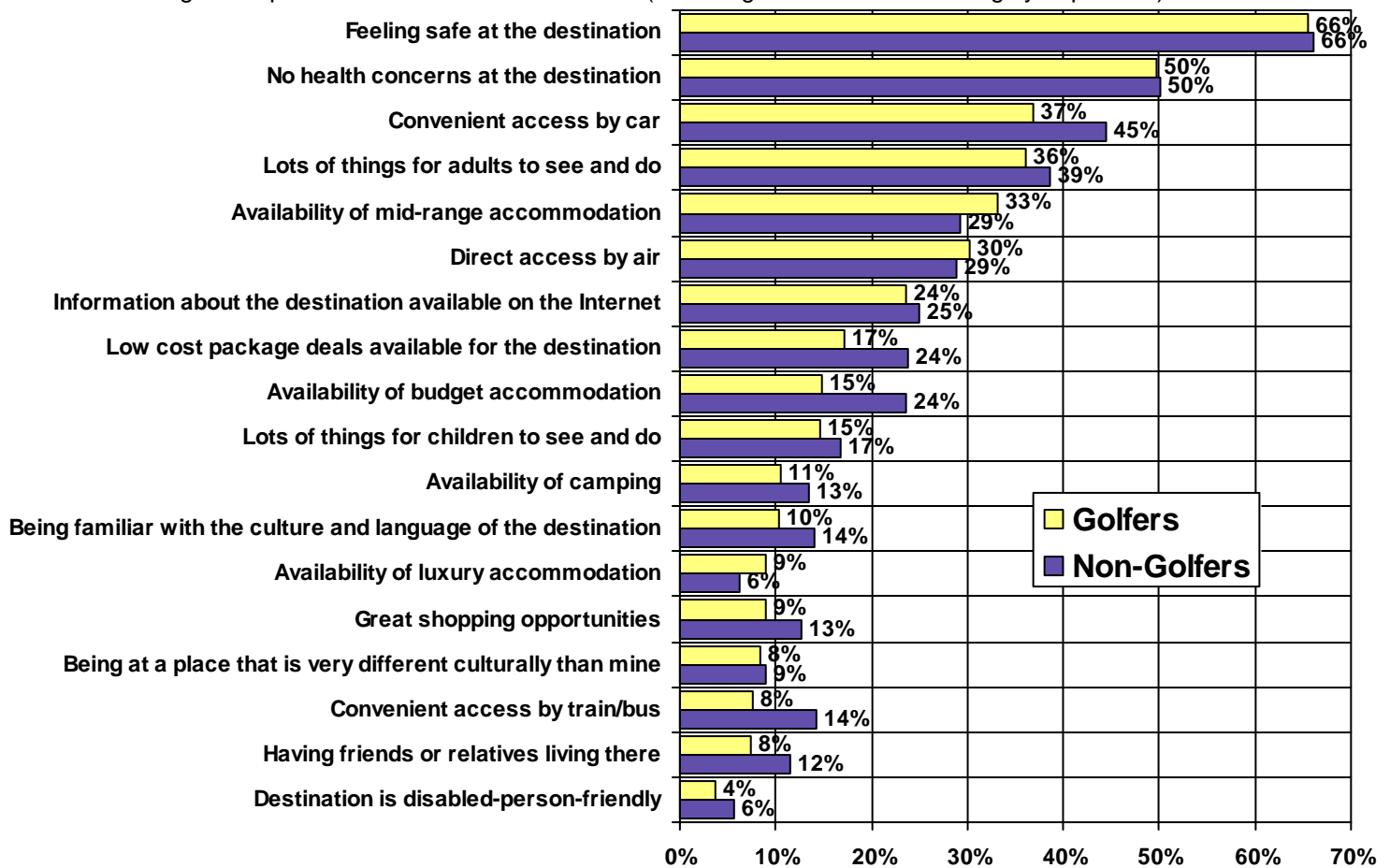
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

Similar to other Canadian Pleasure Travelers, the majority of Golfers consider it important that they feel safe at a destination and have no health concerns. Relative to Non-Golfers, Golfers are more likely to consider it important that a destination offers luxury or mid-range accommodation and less likely to consider it important that a destination offers budget accommodation and low-cost packages. Golfers also consider it less important that a destination is accessible by train or bus or car or has friends and family nearby.

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



How Destinations are Selected

Similar to the average Canadian Pleasure Traveler, Golfers tend to begin planning for both summer and winter trips with a particular destination in mind. However, Golfers are more likely than average to start summer and winter trip planning by considering the specific activities they would like to do while on vacation. They are less likely than average to look for a package deal with no destination in mind.

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

	Golfers	Non-Golfers	Pleasure Travelers	Index
Size of Market	3,377,089	15,062,420	18,439,508	100
Summer				
Started with a desired destination in mind	48.9%	48.4%	48.5%	101
Started by considering specific activities wanted to do	18.7%	12.6%	13.8%	136
Started with a certain type of vacation experience in mind	23.8%	23.7%	23.7%	100
Looked for packaged deals - no destination in mind	1.0%	1.4%	1.3%	80
Considered something else first	2.3%	4.8%	4.3%	53
Don't know / Other	5.3%	9.1%	8.4%	63
Winter				
Started with a desired destination in mind	49.9%	48.3%	48.6%	103
Started by considering specific activities wanted to do	20.5%	14.2%	15.6%	132
Started with a certain type of vacation experience in mind	17.5%	19.8%	19.3%	91
Looked for packaged deals - no destination in mind	3.3%	3.2%	3.2%	103
Considered something else first	3.1%	5.1%	4.7%	66
Don't know / Other	5.8%	9.5%	8.6%	67

Trip Planning and Information Sources Consulted

The majority of Golfers were responsible for planning their trips either on their own (37.9%) or with someone else (20.2%). Relative to the average Canadian Pleasure Traveler, trip planning is slightly more likely to be a shared responsibility among Golfers.

When making vacation plans, Golfers tended to consult a wider variety of sources than the average Canadian Pleasure Traveler. The majority used Internet websites, word-of-mouth and past experiences as sources for travel information. Golfers were particularly more likely than average to obtain trip planning information from travel agents, articles and advertising in newspapers or magazines, an auto club, television programs, email newsletters or magazines and trade, travel or sports shows.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Golfers	Non-Golfers	Pleasure Travelers	Index
Size of Market		3,377,089	15,062,420	18,439,508	100
Who Plans Trips?	Respondent plans trips	37.9%	43.0%	42.0%	90
	Trip planning a shared responsibility	20.2%	15.5%	16.4%	123
	Someone else plans trips	41.8%	41.5%	41.5%	101
Information Sources Consulted	An Internet website	74.3%	63.1%	65.2%	114
	Advice of others / Word-of-mouth	55.8%	50.0%	51.1%	109
	Past experience / Been there before	55.3%	49.3%	50.4%	110
	A travel agent	43.0%	32.0%	34.1%	126
	Maps	34.0%	32.2%	32.6%	104
	Official travel guides or brochures from state / province	27.6%	25.6%	26.0%	106
	Articles in newspapers / magazines	26.9%	19.5%	20.9%	129
	Visitor information centres	25.4%	22.9%	23.4%	109
	An auto club such as CAA	22.7%	16.5%	17.7%	129
	Advertisements in newspapers / magazines	17.6%	13.5%	14.3%	124
	Travel guide books such as Fodor's	16.1%	13.0%	13.6%	118
	Programs on television	9.5%	7.0%	7.5%	127
	Travel information received in the mail	9.1%	8.8%	8.8%	103
	An electronic newsletter or magazine received by e-mail	6.0%	3.7%	4.2%	144
	Visits to trade, travel or sports shows	6.0%	2.4%	3.1%	192
	Advertisements on television	5.7%	4.8%	5.0%	115

Use of the Internet to Plan and Arrange Trips

Golfers are more likely than the average Canadian Pleasure Traveler to use the Internet to plan (69.8%) and book travel (46.6%). However, their use of the Internet is only slightly above average for the 21 outdoor activity types (where on average, 69.5% plan travel and 45.0% book travel on-line). The majority of Golfers use hotel or resort websites, airline websites, travel planning or booking websites such as Expedia and the tourism websites of countries, regions or cities. They are slightly more likely than average to use cruise line websites. Most of those in this segment who booked trip components over the Internet purchased accommodation and airline tickets. Golfers were also more likely than others to rent cars over the Internet.

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

		Golfers	Non-Golfers	Pleasure Travelers	Index
Size of Market		3,377,089	15,062,420	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	30.1%	43.2%	40.8%	74
	Uses Internet to plan trips only	23.2%	21.9%	22.1%	105
	Uses Internet to book part of trip	46.6%	34.9%	37.0%	126
Types of Websites Consulted	A website of a hotel or resort	65.4%	54.7%	57.0%	115
	An airline website	53.6%	44.3%	46.3%	116
	A travel planning / booking website	53.4%	43.5%	45.7%	117
	A tourism website of a country / region / city	50.3%	49.7%	49.8%	101
	A website of an attraction	31.3%	35.4%	34.5%	91
	Some other website	26.6%	27.9%	27.6%	96
	A cruise line website	10.0%	7.5%	8.1%	124
	A motorcoach website	2.6%	2.4%	2.5%	105
Parts of Trips Booked Over The Internet	Accommodation	74.5%	67.5%	69.2%	108
	Air tickets	73.2%	68.4%	69.5%	105
	Car rental	35.2%	24.7%	27.1%	130
	Tickets or fees for specific activities or attractions	28.5%	22.2%	23.6%	120
	A package containing two or more items	18.0%	14.6%	15.4%	117
	Tickets for rail, bus or boat / ship fares	15.0%	15.4%	15.3%	98
	Other	4.1%	3.9%	3.9%	105

Media Consumption Habits

A keen interest in sports reflected by Golfers' trip activities and is also apparent in their media consumption preferences. Golfers are much 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. Golfers can also be targeted effectively through business, finance and investing magazines. Golfers also exhibit an above-average interest in travel-related media, including the travel sections of newspapers, travel magazines, travel websites, and travel shows on television.

Fig. 17 Media Consumption Habits

		Golfers	Non-Golfers	Pleasure Travelers	Index
Size of Market		3,377,089	15,062,420	18,439,508	100
Newspaper Readership	Reads daily newspaper	90.7%	86.5%	87.3%	104
	Reads weekend edition of newspaper	90.3%	86.6%	87.3%	103
	Reads local neighbourhood or community newspapers	64.5%	60.9%	61.5%	105
	Reads other types of newspapers	16.7%	17.3%	17.2%	97
	Frequently or occasionally reads travel section of daily newspaper	55.6%	43.5%	45.7%	122
	Frequently or occasionally reads travel section of weekend newspaper	56.4%	45.3%	47.3%	119
Types of Magazines Read (Top 5 Indexed)	Outdoor activities / sports	26.3%	9.8%	12.8%	205
	Professional sports	16.8%	6.6%	8.5%	197
	Business, finance and investing	26.4%	14.0%	16.3%	162
	Travel (e.g., Condé Nast)	15.2%	11.0%	11.8%	129
	Automobile and cycle magazines	17.0%	12.6%	13.4%	127
Type of Television Programs Watched (Top 5 Indexed)	Sports/sports shows	66.4%	38.2%	43.3%	153
	Biography	48.1%	41.0%	42.3%	114
	Travel shows	33.2%	29.7%	30.3%	110
	Dramas (e.g., Law & Order)	61.7%	56.3%	57.3%	108
	Reality shows (e.g., Canadian Idol)	42.4%	39.2%	39.8%	107
Type of Radio Programs Listened To (Top 5 Indexed)	All sports	21.1%	8.8%	11.1%	191
	Modern rock / Alternative rock	42.5%	35.9%	37.1%	115
	Soft music / Adult contemporary	29.1%	25.0%	25.7%	113
	Top 40 / Current hits	27.9%	24.6%	25.2%	111
	Oldies (50s, 60s, 70s, 80s)	38.2%	33.6%	34.5%	111
Types of Websites Visited (Top 5 Indexed)	Sports	45.4%	22.3%	26.9%	169
	Travel	59.8%	48.3%	50.6%	118
	Weather	62.3%	54.5%	56.1%	111
	Newspaper sites	34.6%	31.1%	31.8%	109
	House and home	30.6%	27.5%	28.1%	109

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