

CANADIAN TRAVEL MARKET

Hiking, Climbing & Paddling While on Trips Of One or More Nights

A Profile Report

October 17, 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



Hiking, Climbing & Paddling While on Trips

Executive Summary

Over the last two years, 25.4% (6,281,852) of adult Canadians went hiking, climbing and paddling while on an out-of-town, overnight trip of one or more nights. Hiking, climbing and paddling was the fourth most common outdoor activity undertaken by Canadian Pleasure Travelers. Hiking as a sameday excursion (18.1%) was the most popular activity, followed by freshwater canoeing or kayaking (8.9%), hiking as an overnight trip (5.6%), ocean kayaking or canoeing (3.0%), mountain climbing or trekking (2.5%), white-water rafting (2.1%), and rock climbing (1.2%). Of those who went hiking, climbing or paddling, 33.9% (2,126,660) reported that this activity was the main reason for taking at least one trip. This activity was the eleventh most common outdoor activity type cited as the main reason for taking a trip.

Hikers, Climbers & Paddlers are equally divided among males and females. They tend to be younger than the average Canadian Pleasure Traveler and are over-represented among young singles and young couples. This is a well-educated segment with 40.1% having a university degree (the sixth highest of the 21 outdoor activity types) and above-average household incomes (\$77,490). Hikers, Climbers and Paddlers are over-represented in Alberta, British Columbia and Quebec.

Almost all Hikers, Climbers & Paddlers have taken a trip within Canada during the past two years (98.5%) and they were more likely to have traveled to other provinces and regions in Canada than the average Canadian Pleasure Traveler. They were especially over-represented among visitors to Alberta, British Columbia and the northern territories.

Hikers, Climbers & Paddlers are very active in outdoor activities and especially in strenuous, high-energy activities (e.g., cross country skiing, cycling, fresh water scuba and snorkeling) both while traveling and not traveling. They are also more likely than average to have taken part in participatory cultural activities (e.g., participatory historical activities, aboriginal cultural experiences) and to have patronized live arts performance (e.g., musical concerts, high arts). They typically stay in public campgrounds and resorts and exhibit above-average interest in wilderness activities and tours. They seek novelty, intellectual stimulation and physical challenges when they travel.

Hikers, Climbers & Paddlers are among the most frequent users of the Internet to plan (75.1%) and book (49.9%) travel. They are also above-average consumers of tourism media. In addition to these channels, Hikers, Climbers and Paddlers can be effectively targeted through science and nature media (e.g., science and geography magazines) and electronic product media (e.g., photography and video magazines; computers, electronics and technology).

Hiking, Climbing & Paddling While on Trips

Market Incidence

Over the last two years, 25.4% (6,281,852) of adult Canadians went hiking, climbing or paddling while on an out-of-town, overnight trip of one or more nights. This was the fourth most common outdoor activity type undertaken by Canadian Pleasure Travelers in the past two years. Hiking as a sameday excursion (18.1%) was the most common activity, followed by freshwater kayaking or canoeing (8.9%), and wilderness hiking or backpacking as an overnight trip with camping or lodging (5.6%). Less common trip activities in this category include ocean kayaking or canoeing (3.0%), mountain climbing or trekking (2.5%), white-water rafting (2.1%) and rock climbing (1.2%).

33.9% (2,126,660) of Hikers, Climber & Paddlers reported that this activity was the main reason for taking at least one trip in the past two years. Wilderness hiking or backpacking with overnight camping or lodging (58.8%) was more likely than the other activities to be cited as the main reason for taking at least one trip in the last two years.

Fig. 1 Incidence of Hiking, Climbing & Paddling While on Trips¹

	Number of Hikers, Climbers & Paddlers ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	6,281,852	2,126,660	18,439,508	24,776,103
Hiking, Climbing & Paddling (All Activities)	6,281,852	33.9%	34.1%	25.4%
Hiking - sameday excursion	4,488,705	22.2%	24.3%	18.1%
Freshwater kayaking/canoeing	2,197,373	32.9%	11.9%	8.9%
Hiking/Backpacking in wilderness with overnight camping/lodging	1,394,382	58.8%	7.6%	5.6%
Ocean kayaking/canoeing	742,989	20.1%	4.0%	3.0%
Mountain climbing/trekking	607,509	36.9%	3.3%	2.5%
White-water rafting	510,720	40.2%	2.8%	2.1%
Rock climbing	297,255	24.4%	1.6%	1.2%
Participated in all seven activities	5,619	LT 0.1%	LT 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 - "Hikers, Climbers & Paddlers" are defined as individuals who hiked, climbed or paddled 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

Hikers, Climbers & Paddlers are more likely to live in Alberta, British Columbia and Quebec. They are least likely to live in the Atlantic Provinces.

Fig. 2 Geographic Distribution of Those Who Hike, Climb & Paddle While on Trips

	Total Population	Estimated Number Who Hiked/ Climbed/Paddled on a Trip	Percent of Pleasure Travelers in Region Who Hiked/Climbed/ Paddled on a Trip	Percent of Total Regional Population Who Hiked/Climbed/ Paddled on a Trip
Canada	24,776,103	6,281,852	34.1%	25.4%
Atlantic Provinces	1,822,494	313,724	24.7%	17.2%
Quebec	5,940,869	1,482,730	35.3%	25.0%
Ontario	9,671,592	2,324,902	32.4%	24.0%
Manitoba	843,107	180,145	30.3%	21.4%
Saskatchewan	706,325	159,252	29.4%	22.5%
Alberta	2,465,540	787,165	39.3%	31.9%
British Columbia	3,326,176	1,033,934	38.8%	31.1%

Demographic Profile

Hikers, Climbers and Paddlers are evenly divided between males and females. Relative to the average Canadian Pleasure Traveler, they are more likely to be young (18 to 34 years of age) and they are over-represented among young singles and young couples. This is a well-educated segment with 40.1% having a university degree (the sixth highest of the 21 outdoor activity types) and above-average household incomes (\$77,490).

Fig. 3 Demographic Profile of Hikers, Climbers & Paddlers
Relative to All Canadian Pleasure Travelers

Attribute	Size of Market	Hikers, Climbers & Paddlers	Did Not Go Hiking, Climbing or Paddling ¹	Pleasure Travelers	Index ²
		6,281,852	12,157,657	18,439,508	100
Gender	Male	49.5%	48.5%	48.8%	101
	Female	50.5%	51.5%	51.2%	99
Age of Respondent	18 to 24	16.4%	10.9%	12.8%	128
	25 to 34	25.0%	16.3%	19.3%	130
	35 to 44	22.6%	19.5%	20.5%	110
	45 to 54	20.3%	20.3%	20.3%	100
	55 to 64	10.4%	16.0%	14.1%	74
	65 Plus	5.2%	16.9%	12.9%	40
Average Age		39.9	46.9	44.5	N/A
Marital Status	Not married	34.4%	31.1%	32.2%	107
	Married	65.6%	68.9%	67.8%	97
Parental Status	No children under 18	69.2%	72.1%	71.1%	97
	Children under 18	30.8%	27.9%	28.9%	107
Education	High school or less	24.7%	42.2%	36.2%	68
	Some post-secondary	12.1%	10.7%	11.2%	108
	Post-secondary diploma/certificate	23.1%	21.2%	21.9%	106
	University degree	40.1%	25.8%	30.7%	131
Household Income	Under \$20,000	4.6%	6.3%	5.7%	81
	\$20,000 to \$39,999	12.9%	15.3%	14.5%	89
	\$40,000 to \$59,999	15.2%	17.2%	16.5%	92
	\$60,000 to \$79,999	16.4%	14.6%	15.2%	108
	\$80,000 to \$99,999	13.2%	11.7%	12.2%	108
	\$100,000 or more	27.3%	20.5%	22.8%	120
	Not stated	10.4%	14.3%	13.0%	80
Average Household Income		\$77,490	\$70,311	\$72,829	N/A

- 1 - "Did Not Go Hiking, Climbing & Paddling" is 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 hike, climb or paddle on any trip. The number of Hikers, Climbers & Paddlers and Non-Hikers, Climbers & Paddlers equals the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Hikers, Climbers & Paddlers in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Hikers, Climbers & Paddlers 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 Hikers, Climbers & Paddlers (98.5%) have taken an overnight trip within Canada during the past two years and they were more likely than the average Canadian Pleasure Traveler to have traveled to another province or region in Canada. Ontario (58.5%), Quebec (46.0%), British Columbia (38.5%) and Alberta (32.2%) were the most common destinations. However this segment is over-represented among visitors to all regions of Canada and especially Alberta, British Columbia, the Yukon, the Northwest Territories and Nunavut.

Hikers, Climbers & Paddlers (54.5%) were slightly more likely than the average Canadian Pleasure traveler to have visited the United States in the past two years. On the other hand, they were over-represented among Canadian Pleasure Travelers to Mexico and other overseas destinations.

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

	Hikers/ Climbers/ Paddlers	Did Not Go Hiking, Climbing or Paddling	Pleasure Travelers	Index
Size of Market	6,281,852	12,157,657	18,439,508	100
Canada	98.5%	92.8%	94.8%	104
Took a trip within own province / region	93.4%	81.9%	85.9%	109
Took a trip to an adjacent province / region	57.4%	44.0%	48.6%	118
Took a trip to non-adjacent province / region	36.4%	28.9%	31.4%	116
Newfoundland and Labrador	4.7%	4.1%	4.3%	109
Prince Edward Island	8.3%	6.6%	7.2%	116
New Brunswick	13.3%	11.1%	11.8%	113
Nova Scotia	13.8%	12.1%	12.7%	108
Quebec	46.0%	35.3%	38.9%	118
Ontario	58.5%	50.9%	53.5%	109
Manitoba	10.4%	8.5%	9.2%	114
Saskatchewan	13.6%	10.3%	11.4%	119
Alberta	32.2%	22.6%	25.8%	125
British Columbia	38.5%	26.6%	30.6%	126
Yukon	1.7%	0.6%	1.0%	174
Northwest Territories	1.0%	0.5%	0.7%	154
Nunavut	0.5%	0.2%	0.3%	174
United States	54.8%	48.5%	50.7%	108
Mexico	15.7%	10.7%	12.4%	127
Caribbean	17.3%	14.7%	15.6%	111
All other destinations	29.6%	20.6%	23.6%	125

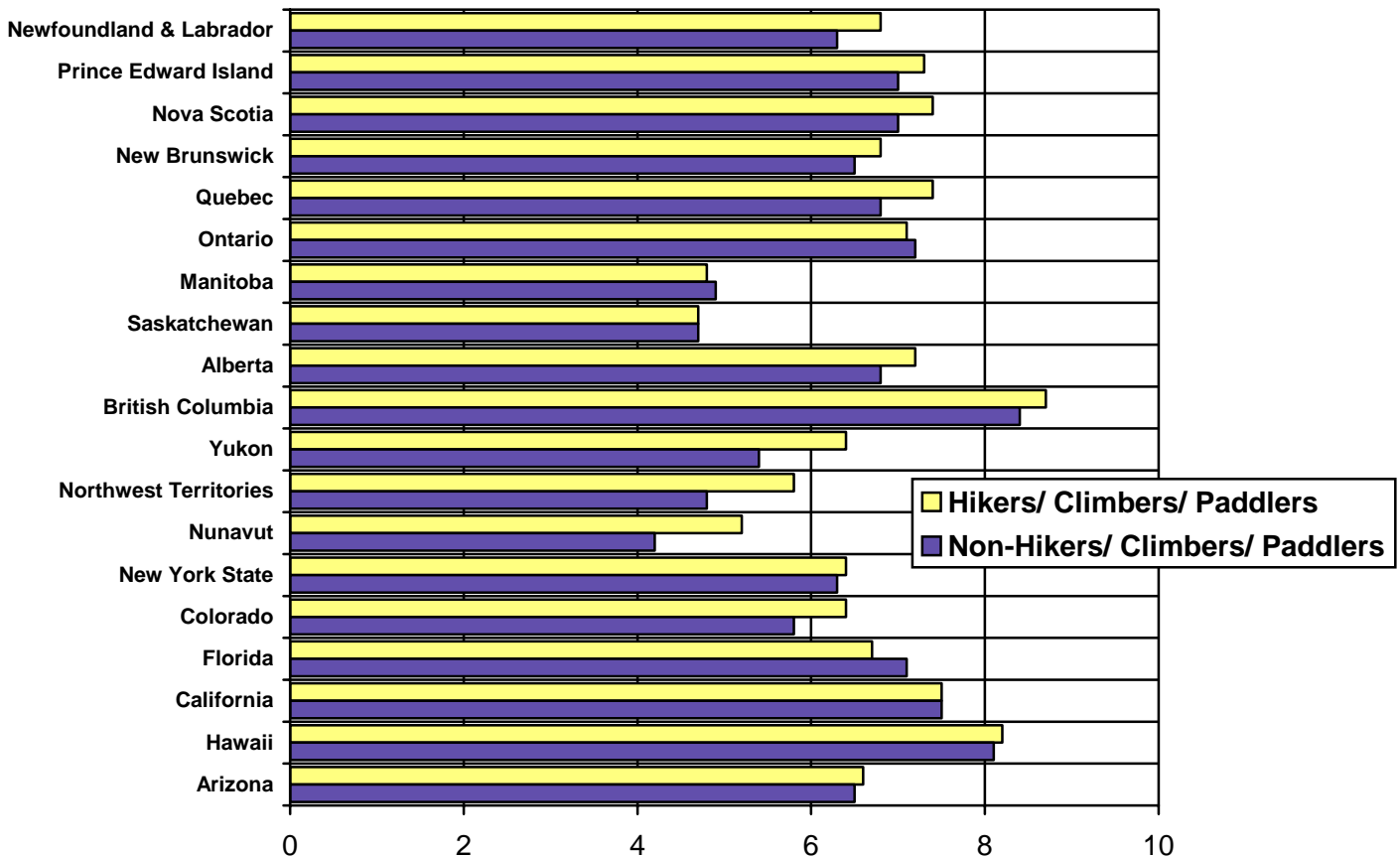
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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

Hikers, Climbers & Paddlers had a more favourable impression of most Canadian destinations than those who did not go hiking, climbing or paddling, and especially for British Columbia (8.7), Alberta (7.2) and Quebec (7.4). (Note: This segment is over-represented in these provinces). They also gave above-average appeal ratings to the Yukon, the Northwest Territories and Nunavut.

Most of the U.S. reference states were perceived as appealing to Hikers, Climbers and Paddlers as to other Canadian Pleasure Travelers. However, Colorado was rated more appealing by this segment than by others.

Fig. 5 Overall Ratings of Appeal 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

Hikers, Climbers and Paddlers are highly active in outdoor activities when they travel. The majority of Hikers, Climbers & Paddlers participated in ocean activities (e.g., sunbathing, swimming in ocean), wildlife viewing, and boating and swimming activities (e.g., motorboating, swimming in lake) when on trips. Relative to the average Canadian Pleasure Traveler, this segment is especially likely to participate in physically challenging activities such as cycling, cross-country skiing and snowshoeing, freshwater scuba and snorkeling and extreme air sports. They were also more likely than average to go exercising and jogging, downhill skiing and snowboarding, skating and sailing and surfing while on trips. Their participation in physically strenuous outdoor activities reflects the fact that this is a young, affluent segment and that these types of travelers typically engage in strenuous outdoor pursuits while on vacation.

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

	Hikers, Climbers & Paddlers	Did Not Go Hiking, Climbing or Paddling	Pleasure Travelers	Index
Size of Market	6,281,852	12,157,657	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	68.7%	38.1%	48.5%	142
Wildlife Viewing	68.6%	27.1%	41.2%	166
Boating & Swimming (e.g., motorboating, swimming in lakes)	63.6%	29.5%	41.1%	155
Sports & Games (e.g., tennis, board games)	35.0%	16.3%	22.7%	154
Fishing	31.2%	19.7%	23.6%	132
Cycling	27.6%	6.3%	13.5%	204
Exercising & Jogging	27.0%	10.1%	15.9%	170
Downhill Skiing & Snowboarding	25.8%	8.9%	14.6%	176
Skating (e.g., ice skating, rollerblading)	21.5%	7.0%	12.0%	180
Golfing	20.9%	17.0%	18.3%	114
Cross-country Skiing & Snowshoeing	19.6%	4.0%	9.3%	210
Team Sports (e.g., hockey, baseball)	14.3%	9.8%	11.4%	126
Snowmobiling & ATVing	14.3%	9.8%	11.3%	126
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	11.6%	3.5%	6.3%	184
Horseback Riding	9.4%	2.6%	4.9%	192
Freshwater Scuba & Snorkeling	6.1%	1.4%	3.0%	201
Wilderness Activities (e.g., wilderness skills course)	5.0%	1.0%	2.4%	212
Hunting	5.0%	4.6%	4.7%	105
Motorcycling	3.9%	2.5%	3.0%	130
Extreme Air Sports (e.g., parachuting)	2.2%	0.5%	1.1%	200

Outdoor Activities Pursued in a Typical Year

The high level of activity exhibited by Hikers, Climbers and Paddlers while on trips is also apparent when they are not traveling. They frequently go hiking, cycling, and exercising while not on trips. Relative to the average Canadian Pleasure Traveler, Hikers, Climbers and Paddlers are especially likely participate in nature-oriented, strenuous activities such as canoeing or kayaking, downhill skiing, cross-country skiing and snowboarding while not traveling. They were slightly less likely than average to go hunting, snowmobiling and ATViing.

Fig. 7 Outdoor Activities Pursued in a Typical Year

	Hikers, Climbers & Paddlers	Did Not Go Hiking, Climbing or Paddling	Pleasure Travelers	Index
Size of Market	6,281,852	12,157,657	18,439,508	100
Day outing to a park	78.0%	61.1%	66.9%	117
Hiking	73.6%	36.0%	48.8%	151
Swimming	69.0%	55.8%	60.3%	114
Exercising at home or at a fitness club	66.3%	58.2%	61.0%	109
Gardening	61.2%	59.0%	59.8%	102
Cycling	60.5%	36.0%	44.3%	136
Picnicking	59.9%	49.5%	53.1%	113
Camping	52.7%	31.3%	38.6%	136
Ice-skating	36.0%	24.6%	28.5%	126
Canoeing or kayaking	33.3%	8.4%	16.9%	197
Jogging	32.2%	19.9%	24.1%	134
Golfing	28.7%	29.7%	29.4%	98
Fishing	28.6%	29.6%	29.3%	98
Playing team sports	28.1%	20.3%	22.9%	122
Sailing or other boating	26.5%	21.9%	23.4%	113
Playing racquet sports (e.g., tennis or badminton)	25.9%	15.6%	19.1%	135
Downhill skiing	25.2%	11.6%	16.2%	155
Rollerblading	20.0%	11.5%	14.4%	139
Cross-country skiing	19.8%	8.7%	12.5%	159
Riding an all-terrain vehicle (ATV)	13.2%	14.8%	14.3%	93
Horseback riding	9.0%	5.7%	6.8%	133
Snowmobiling	8.6%	10.4%	9.8%	88
Snowboarding	8.2%	3.4%	5.0%	163
Hunting	6.8%	8.2%	7.7%	88
Skateboarding	2.0%	1.4%	1.6%	128

Culture and Entertainment Activities Pursued While on Trips

Hikers, Climbers and Paddlers were more active than the average Canadian Pleasure Traveler in most culture and entertainment activities while on trips. They frequently went shopping and dining, visited historical sites, museums and art galleries, attended fairs and festivals and visited theme parks and exhibits when on trips. Relative to the average Canadian Pleasure Traveler, they were especially likely to take part in participatory outdoor activities (e.g., participatory historical activities, aboriginal cultural experiences, agro-tourism). Hikers, Climbers and Paddlers were also more likely to attend live art performances (e.g., high art performances, music concerts, festivals and attractions, comedy festivals and clubs) and literary and film festivals. They also enjoy wine, beer and food tastings and spa visits 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)

	Hikers, Climbers & Paddlers	Did Not Go Hiking, Climbing or Paddling	Pleasure Travelers	Index
Size of Market	6,281,852	12,157,657	18,439,508	100
Shopping & Dining	90.2%	79.1%	82.9%	109
Historical Sites, Museums & Art Galleries	76.3%	49.0%	58.3%	131
Fairs & Festivals	51.2%	30.7%	37.7%	136
Theme Parks & Exhibits	50.3%	33.4%	39.2%	128
Musical Concerts, Festivals & Attractions	45.9%	25.9%	32.7%	140
Wine, Beer & Food Tastings	33.2%	19.0%	23.8%	139
Science & Technology Exhibits	31.7%	18.7%	23.1%	137
Live Theatre	27.0%	18.0%	21.1%	128
Garden Theme Attractions	26.2%	13.2%	17.6%	149
Casinos	26.0%	25.8%	25.9%	100
Agro-Tourism	22.3%	12.3%	15.7%	142
Aboriginal Cultural Experiences	20.4%	7.1%	11.6%	176
Professional Sporting Events	19.9%	13.5%	15.7%	127
High Art Performances	16.4%	8.2%	11.0%	149
Amateur Tournaments	15.5%	9.9%	11.8%	131
Spas	15.1%	7.4%	10.0%	151
Comedy Festivals & Clubs	14.3%	8.0%	10.1%	141
Participatory Historical Activities	12.9%	3.5%	6.7%	193
Equestrian & Western Events	8.7%	5.6%	6.7%	131
Literary & Film Festivals	4.2%	1.7%	2.6%	163
National & International Sporting Events	4.0%	2.8%	3.2%	125

Culture and Entertainment Activities Pursued in a Typical Year

Hikers, Climbers and Paddlers are also quite active in Culture and Entertainment activities while not traveling. As with most Canadian Pleasure Travelers, Hikers, Climbers and Paddlers frequently dine in restaurants and go to festivals and fairs. Relative to the average Canadian Pleasure Traveler, they are especially likely to attend live, local musical performances (e.g., bars with live pop or rock bands, rock music concerts, jazz clubs, ballet, opera) and visit local art galleries and shows. On the other hand, they are less likely than average to gamble in casinos.

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

	Hikers, Climbers & Paddlers	Did Not Go Hiking, Climbing or Paddling	Pleasure Travelers	Index
Size of Market	6,281,852	12,157,657	18,439,508	100
Going out to eat in restaurants	92.4%	91.1%	91.5%	101
Going to festivals or fairs	67.0%	58.6%	61.4%	109
Going to historic sites or heritage buildings	45.7%	36.0%	39.3%	116
Going to amateur sporting events	45.1%	40.4%	42.0%	107
Going to pick-your-own farms or farmers' market	44.3%	39.3%	41.0%	108
Going to art galleries or art shows	40.7%	27.2%	31.8%	128
Going to museums	40.4%	28.8%	32.7%	123
Going to live theatre	38.5%	32.9%	34.8%	111
Going to bars with live pop or rock bands	35.5%	23.7%	27.7%	128
Going dancing	33.9%	27.8%	29.9%	114
Going to professional sporting events	33.3%	31.4%	32.1%	104
Going to zoos or aquariums	32.0%	29.6%	30.4%	105
Going to botanical gardens	29.4%	23.3%	25.4%	116
Going to amusement or theme parks	29.2%	28.7%	28.9%	101
Going to rock music concerts	28.7%	19.2%	22.4%	128
Going to classical music concerts	19.8%	14.8%	16.5%	120
Going to day spas	16.1%	12.5%	13.8%	117
Going to gamble in casinos	14.2%	20.1%	18.1%	78
Going to jazz clubs	11.5%	5.5%	7.5%	153
Staying overnight in a hotel or B&B in own city	10.1%	9.8%	9.9%	102
Going to the ballet	9.2%	6.3%	7.3%	126
Going to the opera	7.9%	5.9%	6.6%	119
Going to rodeos	7.6%	7.2%	7.3%	103

Accommodation Stayed In While on a Trip

Hikers, Climbers and Paddlers tended to stay in public campgrounds while on trips. Water-based resorts (i.e., lakeside, riverside, seaside) were also popular with this activity segment. Relative to the average Canadian Pleasure Traveler, Hikers, Climbers and Paddlers were also more likely to stay at ski or mountain resorts and in wilderness settings (e.g., campsite, wilderness lodge accessible by car, fly-in or remote wilderness lodge or outpost).

Fig. 10 Accommodation Stayed in While on Trips

	Hikers/ Climbers/ Paddlers	Did Not Go Hiking, Climbing or Paddling	Pleasure Travelers	Index
Size of Market	6,281,852	12,157,657	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	44.5%	17.0%	26.4%	169
Lakeside / Riverside Resort	30.5%	18.1%	22.3%	137
Seaside Resort	28.7%	16.6%	20.7%	138
A Private Campground	27.9%	14.1%	18.8%	148
Ski Resort or Mountain Resort	22.9%	9.3%	13.9%	164
A Camp Site in a Wilderness Setting (Not a Campground)	16.4%	4.5%	8.6%	192
Wilderness Lodge You Can Drive to by Car	9.1%	3.8%	5.6%	162
Health Spa	8.6%	4.6%	5.9%	144
Country Inn or Resort with Gourmet Restaurant	6.9%	4.2%	5.1%	135
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	5.6%	3.9%	4.5%	126
Farm or Guest Ranch	4.7%	2.2%	3.0%	155
Remote or Fly-In Wilderness Lodge	2.5%	1.1%	1.6%	158
On a Houseboat	2.2%	0.9%	1.4%	162
Remote or Fly-In Wilderness Outpost	1.2%	0.2%	0.6%	212
Cooking School	0.5%	0.3%	0.4%	135
Wine Tasting School	0.3%	0.2%	0.3%	114

Tours and Cruises Taken During Past Two Years

Hikers, Climbers and Paddlers were more likely than the average Canadian Pleasure Traveler to have taken a wide variety of tours during the past two years. Sameday tours (both guided and self-guided), tours around a city and scenic drives in the country were the most popular tours for this segment. Relative to the average Canadian Pleasure Traveler, Hikers, Climbers and Paddlers were particularly more likely to have taken multiple-location, overnight tours (both guided & self-guided), wilderness tour, air tours and tours of wineries and factories. On the other hand, they were less likely to have taken an ocean cruise (e.g., a Caribbean cruise, an Alaskan cruise) during the past two years.

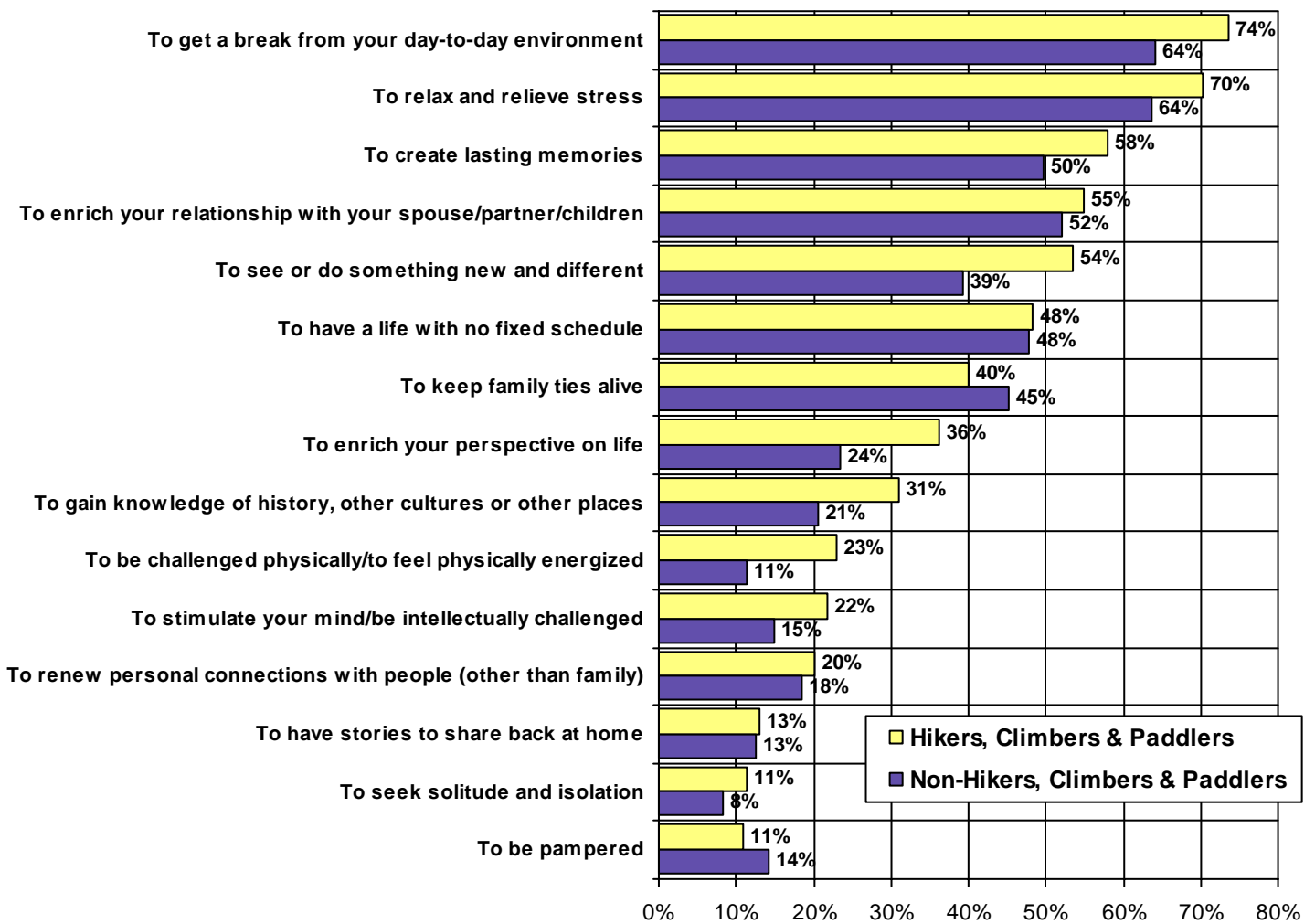
Fig. 11 Tours and Cruises Taken During Past Two Years

	Hikers, Climbers & Paddlers	Did Not Go Hiking, Climbing or Paddling	Pleasure Travelers	Index
Size of Market	6,281,852	12,157,657	18,439,508	100
A self-guided, sameday tour while on an overnight trip	42.9%	22.3%	29.3%	146
Around the countryside – scenic drives	32.5%	17.2%	22.4%	145
Around the city	31.8%	19.0%	23.4%	136
An organized, sameday, guided tour while on an overnight trip	31.3%	17.5%	22.2%	141
A self-guided, overnight tour where you stayed in different locations	28.1%	13.0%	18.1%	155
Wilderness tour	24.6%	7.0%	13.0%	189
On the water (sightseeing cruise)	20.2%	9.4%	13.1%	154
Some other type of tour	14.7%	7.3%	9.8%	149
An organized, overnight, guided tour where you stayed in different locations	12.4%	8.8%	10.1%	124
An organized, overnight, guided tour where you stayed in a single location	10.0%	6.7%	7.8%	128
To a winery	8.8%	4.0%	5.6%	156
To a casino	7.7%	5.9%	6.5%	117
Caribbean ocean cruise	4.5%	5.8%	5.4%	84
To a factory	4.5%	1.7%	2.6%	171
Ocean cruise – Other	3.6%	3.2%	3.3%	107
Cruise on another lake or river	3.0%	2.1%	2.4%	127
In the air as a pilot or passenger of an airplane or helicopter	2.9%	1.4%	1.9%	153
Cruise on the St. Lawrence River	2.7%	1.6%	1.9%	137
Some other type of cruise	1.8%	1.5%	1.6%	112
Alaskan ocean cruise	1.2%	1.9%	1.6%	72
Great Lakes cruise	0.9%	0.7%	0.8%	111
Submarine cruise	0.1%	0.1%	0.1%	99

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travelers, the majority of Hikers, Climbers & Paddlers take vacations to get a break from their day-to-day environment, to relax and relieve stress, to create lasting memories and to enrich family relationships. However, Hikers, Climbers and Paddlers especially seek vacation destinations that offer a wide range of activities, novelty, intellectual stimulation and physical challenges. They are less likely to view vacations as opportunities to keep family ties together.

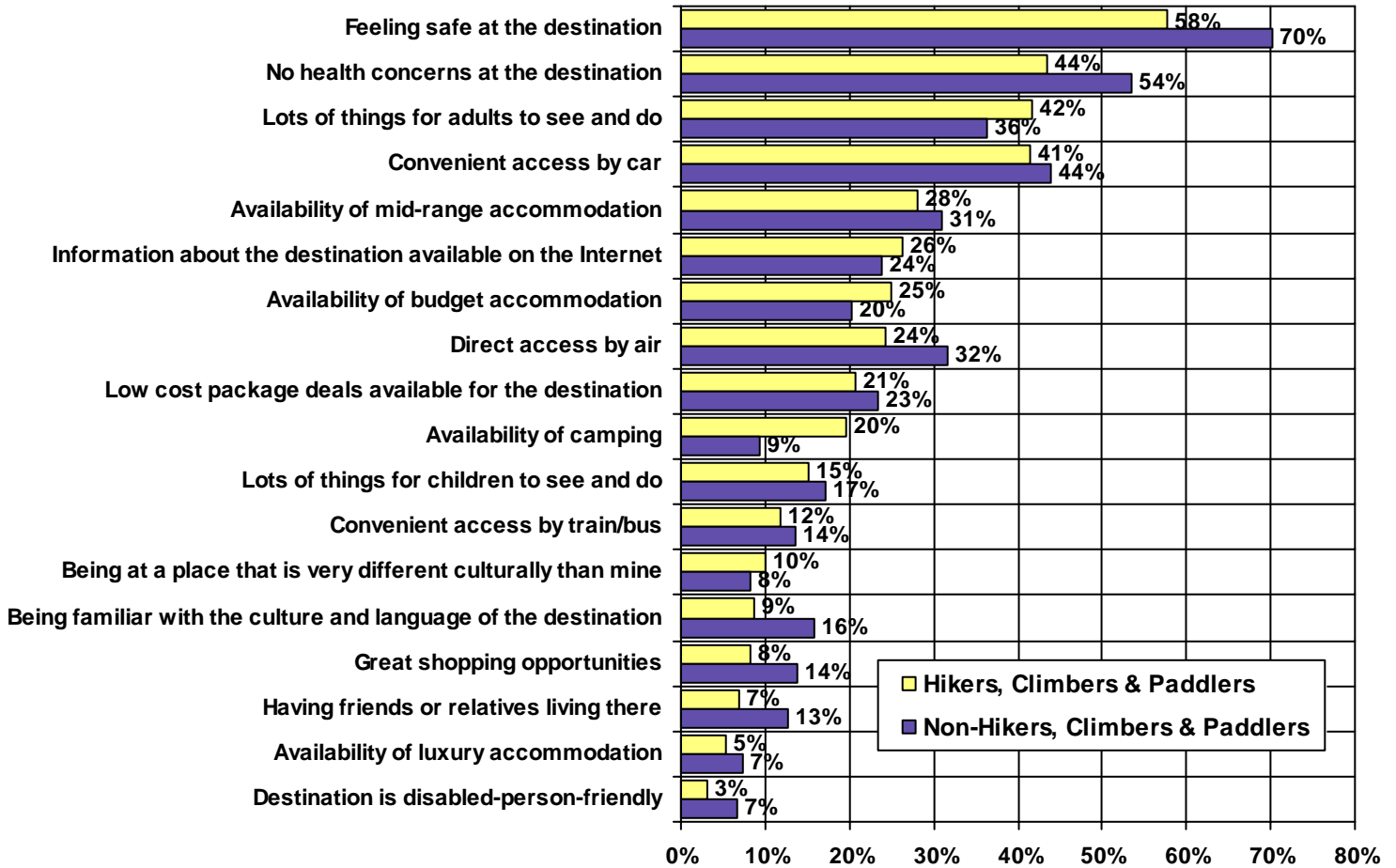
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, Hikers, Climbers and Paddlers consider it important that they feel safe at a destination, albeit to a much lesser extent than the typical Canadian Pleasure Traveler. Hikers, Climbers & Paddlers are more likely than others to consider it important that a destination has lots of things for adults to see and do as well as budget accommodation and camping. They are less likely than other Canadian Pleasure Travelers to consider it important that a destination has no health concerns, is directly accessible by air, has a familiar culture and language, offers great shopping opportunities and has friends or relatives living nearby.

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



How Destinations are Selected

Similar to the average Canadian Pleasure Traveler, Hikers, Climbers and Paddlers tend to start planning trips with a particular destination in mind. However, Hikers, Climbers and Paddlers are more likely than the average Canadian Pleasure Traveler to start trip planning by considering what types of activities they would like to do while on vacation.

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

	Hikers, Climbers & Paddlers	Did Not Go Hiking, Climbing or Paddling	Pleasure Travelers	Index
Size of Market	6,281,852	12,157,657	18,439,508	100
Summer				
Started with a desired destination in mind	50.7%	47.1%	48.5%	105
Started by considering specific activities wanted to do	17.3%	11.7%	13.8%	125
Started with a certain type of vacation experience in mind	22.2%	24.6%	23.7%	94
Looked for packaged deals - no destination in mind	1.4%	1.2%	1.3%	109
Considered something else first	4.0%	4.5%	4.3%	92
Don't know / Other	4.5%	10.8%	8.4%	53
Winter				
Started with a desired destination in mind	47.1%	49.6%	48.6%	97
Started by considering specific activities wanted to do	21.2%	11.9%	15.6%	136
Started with a certain type of vacation experience in mind	19.1%	19.4%	19.3%	99
Looked for packaged deals - no destination in mind	2.6%	3.6%	3.2%	81
Considered something else first	4.1%	5.0%	4.7%	88
Don't know / Other	5.8%	10.5%	8.6%	68

Trip Planning and Information Sources Consulted

The majority of Hikers, Climbers and Paddlers were responsible for planning their trips either on their own (42.8%) or with someone else (14.3%).

When planning vacations, Hikers, Climbers and Paddlers consulted a wider variety of sources than the average Canadian Pleasure Traveler. The majority in this segment used the Internet, word-of-mouth and past experiences to plan travel. They were particularly more likely than average to obtain trip planning information from maps, official tourism sources (e.g., guides and brochures, visitor information centres), newspaper articles, travel guidebooks such as Fodor's and television programs.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Hikers, Climbers & Paddlers	Did Not Go Hiking, Climbing or Paddling	Pleasure Travelers	Index
	Size of Market	6,281,852	12,157,657	18,439,508	100
Who Plans Trips?	Respondent plans trips	42.8%	41.6%	42.0%	102
	Trip planning a shared responsibility	14.3%	17.6%	16.4%	87
	Someone else plans trips	42.9%	40.8%	41.5%	103
Information Sources Consulted	An Internet website	78.8%	57.5%	65.2%	121
	Advice of others / Word-of-mouth	62.5%	44.7%	51.1%	122
	Past experience / Been there before	60.4%	44.7%	50.4%	120
	Maps	43.6%	26.3%	32.6%	134
	Official travel guides or brochures from state / province	37.1%	19.6%	26.0%	143
	A travel agent	36.3%	32.9%	34.1%	106
	Visitor information centres	33.8%	17.5%	23.4%	144
	Articles in newspapers / magazines	29.0%	16.3%	20.9%	139
	Travel guide books such as Fodor's	21.7%	9.1%	13.6%	159
	An auto club such as CAA	21.0%	15.8%	17.7%	119
	Advertisements in newspapers / magazines	18.4%	11.9%	14.3%	129
	Travel information received in the mail	11.6%	7.3%	8.8%	131
	Programs on television	11.3%	5.4%	7.5%	150
	Advertisements on television	5.8%	4.5%	5.0%	117
	An electronic newsletter or magazine received by e-mail	5.6%	3.3%	4.2%	135
Visits to trade, travel or sports shows	4.2%	2.5%	3.1%	136	

Media Consumption Habits

Hikers, Climbers and Paddlers are more likely than the average Canadian Pleasure Traveler to read the travel section of newspapers, watch travel shows on television and visit travel websites. This segment may also be effectively targeted through science and nature media (e.g., science and geography magazines, science and nature television shows, science fiction television shows) and electronic product media (e.g., photography and video magazines; computers, electronics and technology). Their musical tastes are quite eclectic as they are over-indexed for most radio music formats including jazz / big band, classical music, modern and alternative rock and Top 40 / current hits.

Fig. 17 Media Consumption Habits

		Hikers, Climbers & Paddlers	Did Not Go Hiking, Climbing or Paddling	Pleasure Travelers	Index
Size of Market		6,281,852	12,157,657	18,439,508	100
Newspaper Readership	Reads daily newspaper	86.4%	87.7%	87.3%	99
	Reads weekend edition of newspaper	86.6%	87.6%	87.3%	99
	Reads local neighbourhood or community newspapers	63.2%	60.7%	61.5%	103
	Reads other types of newspapers	18.4%	16.5%	17.2%	107
	Frequently or occasionally reads travel section of daily newspaper	47.3%	44.9%	45.7%	103
	Frequently or occasionally reads travel section of weekend newspaper	50.7%	45.6%	47.3%	107
Types of Magazines Read (Top 5 Indexed)	Photography and video	5.8%	3.1%	4.1%	144
	Science and geography	22.8%	13.4%	16.6%	138
	Outdoor activities / sports	16.9%	10.7%	12.8%	132
	Magazines about your city	15.5%	10.1%	12.0%	130
	Computers, electronics and technology	12.4%	9.4%	10.4%	119
Type of Television Programs Watched (Top 5 Indexed)	Science & nature shows	50.2%	40.6%	43.8%	114
	Science fiction / Fantasy shows	21.9%	17.8%	19.2%	114
	Travel shows	33.0%	28.9%	30.3%	109
	Late night talk shows	28.8%	26.8%	27.5%	105
	Dramas (e.g., Law & Order)	57.6%	57.1%	57.3%	101
Type of Radio Programs Listened To (Top 5 Indexed)	Jazz / Big band	12.0%	7.1%	8.8%	137
	Classical music	21.2%	15.2%	17.2%	123
	Modern rock / Alternative rock	45.1%	32.9%	37.1%	122
	Multicultural	10.0%	7.5%	8.4%	120
	Top 40 / Current hits	28.6%	23.4%	25.2%	114
Types of Websites Visited (Top 5 Indexed)	Sites for specific activities or interests	42.2%	32.0%	35.9%	118
	Network news sites (e.g., CBC, CNN)	40.7%	33.3%	36.1%	113
	Travel	56.9%	46.6%	50.6%	113
	Magazine sites	18.2%	15.6%	16.6%	110
	Shopping (all types)	36.0%	31.9%	33.5%	108

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