

CANADIAN TRAVEL MARKET

Ocean Activities While on Trips Of One or More Nights

A Profile Report

October 20, 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



Ocean Activities While on Trips

Executive Summary

Over the last two years, 36.1% (8,951,385) of adult Canadians participated in ocean activities while on an out-of-town, overnight trips of one or more nights. Ocean activities were the most common outdoor activities pursued by Canadian Pleasure Travelers in the last two years. Sunbathing (30.5%) and swimming (21.4%) were the most popular activities, followed by snorkeling in the ocean (7.9%) and scuba diving in the ocean (2.1%). Of those who participated in ocean activities, 42.5% (3,806,110) reported that this activity was the main reason for taking at least one trip. Ocean activities were the sixth most common reason stated for taking at least one trip in the past two years.

Relative to the average Canadian Pleasure Traveler, those who participated in ocean activities while on trips are slightly more likely to be female (52.8%) and generally between 18 and 54 years of age. They were more likely to have dependent children (under 18) living at home. This is a moderately affluent segment with above-average levels of education (35.1% have a university degree) and household incomes (\$80,025). They are over-represented in British Columbia, Quebec, Ontario and Alberta.

Those who participated in Ocean Activities have traveled frequently outside of Canada in the past two years. They were the 4th most likely of the 21 outdoor activity types to have taken a trip to the Caribbean (25.7%), the 5th most likely to have visited Mexico (20.0%) and the 8th most likely to have traveled to the United States (59.2%). By contrast, they were the least likely of the 21 outdoor segments to have traveled within their own province or region (89.5%), the 19th most likely to have visited an adjacent province or region (52.1%) and the 18th most likely to have visited a non-adjacent region (34.7%).

Relative to the average Canadian Pleasure Traveler, those who participated in ocean activities were especially active in water-related activities (e.g., freshwater scuba diving and snorkeling, sailing and surfing, boating and swimming). They were also more likely to visit spas, comedy festivals and clubs and music concerts, festivals and fairs. They were much more likely than the average Canadian Pleasure Traveler to have stayed at a seaside resort and to have taken a Caribbean Ocean cruise. They seek vacations that offer an opportunity to relax and relieve stress, create lasting memories and strengthen family relationships.

Those who participated in ocean activities on trips are above-average users of the Internet to plan (71.5%) and book travel (47.1%). They are avid consumers of travel media and may also be effectively targeted effectively through popular entertainment media (e.g., entertainment/music magazines and websites, Top 40/Current hits radio) and magazines focusing on city lifestyles, fashion and beauty.

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 participated in ocean activities 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.

Ocean Activities While on Trips

Market Incidence

Over the last two years, 36.1% (8,951,385) of adult Canadians participated in ocean activities while on an out-of-town, overnight trip of one or more nights. Ocean activities were the most common outdoor activities pursued by Canadian Pleasure Travelers in the last two years. Sunbathing or sitting on a beach (30.5%) was the most popular activity followed by swimming in the ocean (21.4%), snorkeling in the ocean (7.9%) and scuba diving in the ocean (2.1%). 1.2% (309,445) of adult Canadians participated in all four ocean activities while on trips during the past two years.

Of those who participated in an ocean activity, 42.5% (3,806,110) reported that this activity was the main reason for taking at least one trip in the past two years. Ocean activities were the sixth most common reason stated for taking at least one trip in the past two years. Sunbathing or sitting on a beach (43.4%) was more likely than swimming (29.7%), scuba diving (23.7%) or snorkeling (13.8%) in the ocean to be the main reason for taking at least one trip over the course of the last two years.

Fig. 1 Incidence of Participating in Ocean Activities While on Trips¹

	Number Who Participated in Ocean Activities ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	8,951,385	3,806,110	18,439,508	24,776,103
Ocean Activities (All Activities)	8,951,385	42.5%	48.5%	36.1%
Sunbathing or sitting on a beach	7,550,089	43.4%	40.9%	30.5%
Swimming in the sea or ocean	5,298,304	29.7%	28.7%	21.4%
Snorkeling in the sea or ocean	1,947,938	13.8%	10.6%	7.9%
Scuba diving in the sea or ocean	517,056	23.7%	2.8%	2.1%
Participated in all four ocean activities	309,445	4.9%	1.7%	1.2%

- 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 participated in ocean activities while on an out-of-town, overnight trip of one or more nights during the past two years and who took at least one out-of-town pleasure trip of one or more nights during the past two years. This column reports the number of individuals who participated in the activity on at least one trip during the last two years.
- 3 - This column reports the percent who participated in each activity who stated that the activity was the main reason for taking at least one trip during the past two years.
- 4 - "Pleasure Travelers" are defined as individuals who have taken at least one out-of-town pleasure trip of one or more nights in the last two years. This column reports the percent of Pleasure Travelers who participated in each activity on at least one trip during the last two years.
- 5 - This column reports the percent of the Total Canadian Adult Market who participated in each activity on a trip during the past two years.

Incidence by Region

Those who participated in ocean activities while on trips are more likely to live in British Columbia (51.6%), Quebec (50.1%), Alberta (49.2%) and Ontario (48.7%). They are least likely to live in Saskatchewan or the Atlantic Regions.

Fig. 2 Geographic Distribution of Those Who Participated in Ocean Activities While on Trips

	Total Population	Estimated Number Who Participated in Ocean Activities on a Trip	Percent of Pleasure Travelers in Region Who Participated in Ocean Activities on a Trip	Percent of Total Regional Population Who Participated in Ocean Activities on a Trip
Canada	24,776,103	8,951,385	48.5%	36.1%
Atlantic Provinces	1,822,494	504,324	39.8%	27.7%
Quebec	5,940,869	2,103,012	50.1%	35.4%
Ontario	9,671,592	3,493,703	48.7%	36.1%
Manitoba	843,107	264,406	44.4%	31.4%
Saskatchewan	706,325	225,908	41.7%	32.0%
Alberta	2,465,540	985,627	49.2%	40.0%
British Columbia	3,326,176	1,374,405	51.6%	41.3%

Demographic Profile

Relative to the average Canadian Pleasure Traveler, those who participated in ocean activities are slightly more likely to be female (52.4%) and between 18 to 54 years of age. They are more likely to have dependent children at home. This is a moderately affluent segment with an above-average level of education (35.1% have a university degree) and household income (\$80,025 – ranked 7th of the 21 outdoor activity types).

Fig. 3 Demographic Profile of Those Who Participated in Ocean Activities When on Trips
Relative to All Canadian Pleasure Travelers

Attribute	Size of Market	Participated in Ocean Activities	Did Not Participate in Ocean Activities ¹	Pleasure Travelers	Index ²
		8,951,385	9,488,124	18,439,508	100
Gender	Male	47.2%	50.4%	48.8%	97
	Female	52.8%	49.6%	51.2%	103
Age of Respondent	18 to 24	14.4%	11.3%	12.8%	112
	25 to 34	21.2%	17.5%	19.3%	110
	35 to 44	23.3%	18.0%	20.5%	113
	45 to 54	21.4%	19.3%	20.3%	105
	55 to 64	11.8%	16.3%	14.1%	84
	65 Plus	7.9%	17.6%	12.9%	61
Average Age		42.0	46.9	44.5	N/A
Marital Status	Not married	31.9%	32.5%	32.2%	99
	Married	68.1%	67.5%	67.8%	100
Parental Status	No children under 18	67.6%	74.4%	71.1%	95
	Children under 18	32.4%	25.6%	28.9%	112
Education	High school or less	30.6%	41.5%	36.2%	84
	Some post-secondary	11.6%	10.8%	11.2%	103
	Post-secondary diploma/certificate	22.7%	21.1%	21.9%	104
	University degree	35.1%	26.5%	30.7%	114
Household Income	Under \$20,000	4.1%	7.2%	5.7%	72
	\$20,000 to \$39,999	11.3%	17.5%	14.5%	78
	\$40,000 to \$59,999	14.4%	18.5%	16.5%	87
	\$60,000 to \$79,999	15.8%	14.7%	15.2%	104
	\$80,000 to \$99,999	13.5%	11.0%	12.2%	111
	\$100,000 or more	29.1%	16.9%	22.8%	128
	Not stated	11.7%	14.3%	13.0%	90
Average Household Income		\$80,025	\$65,835	\$72,829	N/A

- 1 - "Did Not Participate in Ocean Activities" is 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 participate in ocean activities on any trip. The number of participants and non-participants equals the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Ocean Activities in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Ocean Activities are over or under-represented relative to the average Pleasure Traveler. An index of 100 means the percent participating in the activity is the same as that of the average Canadian Pleasure Traveler. Index values over 100 indicate that those participating in the activity are over-represented relative to the average Canadian Pleasure Traveler. Index values less than 100 indicate that those participating in the activity are under-represented relative to the average Canadian Pleasure Traveler.

Travel Activity (During Last Two Years)

While 95.9% of those who participated in ocean activities took a trip within Canada in the last two years, this activity segment is more noteworthy for their travel outside of Canada. They were the fourth most likely of the 21 outdoor activity types to have taken a trip to the Caribbean (25.7), the fifth most likely to have visited Mexico (20.0%) and the eighth most likely to have traveled to the United States (59.2%).

By contrast, they were the least likely of the 21 outdoor segments to have traveled within their own province or region (89.5%), the 19th most likely to taken a trip to an adjacent province or region (52.1%) and the 18th most likely to have visited a non-adjacent province or region (34.7%). In relative terms, those in this segment are slightly over-represented among visitors to Prince Edward Island and British Columbia.

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

	Participated in Ocean Activities	Did Not Participate in Ocean Activities	Pleasure Travelers	Index
Size of Market	8,951,385	9,488,124	18,439,508	100
Canada	95.9%	93.7%	94.8%	101
Took a trip within own province / region	89.5%	82.4%	85.9%	104
Took a trip to an adjacent province / region	52.1%	45.2%	48.6%	107
Took a trip to non-adjacent province / region	34.7%	28.4%	31.4%	110
Newfoundland and Labrador	4.2%	4.4%	4.3%	97
Prince Edward Island	8.5%	5.9%	7.2%	119
New Brunswick	12.9%	10.9%	11.8%	109
Nova Scotia	14.1%	11.4%	12.7%	111
Quebec	41.6%	36.4%	38.9%	107
Ontario	56.5%	50.7%	53.5%	106
Manitoba	9.9%	8.5%	9.2%	108
Saskatchewan	12.3%	10.5%	11.4%	108
Alberta	28.5%	23.4%	25.8%	110
British Columbia	34.4%	27.1%	30.6%	112
Yukon	1.1%	0.9%	1.0%	107
Northwest Territories	0.6%	0.7%	0.7%	90
Nunavut	0.3%	0.3%	0.3%	102
United States	59.2%	42.6%	50.7%	117
Mexico	20.0%	5.2%	12.4%	162
Caribbean	25.9%	5.9%	15.6%	166
All other destinations	28.7%	18.8%	23.6%	122

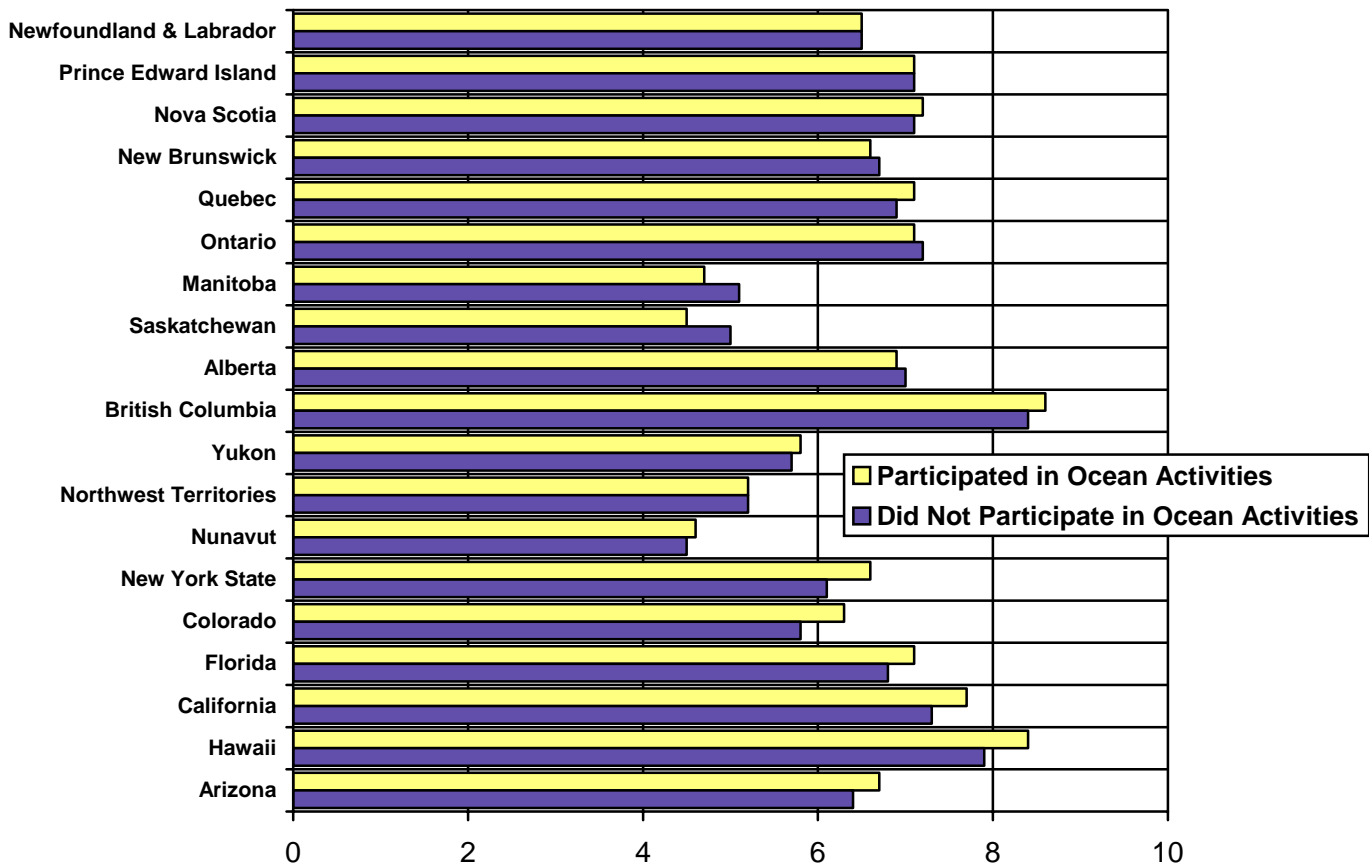
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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 Canadian destinations among those who participated in ocean activities while on trips were comparable to those of other Canadian Pleasure Travelers. Those who participated in ocean activities rated British Columbia (8.6) as most appealing destination followed by Nova Scotia (7.2), Prince Edward Island (7.1), Quebec (7.1) and Ontario (7.1).

On the other hand, those who participated in ocean activities tend to rate the U.S. reference states as more appealing than other Canadian Pleasure Travelers. Hawaii (8.4), California (7.7) and Florida (7.1) received the highest ratings from 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 Outdoor Activities Pursued While on Trips

Those who participated in ocean activities while on trips were more likely than the average Canadian Pleasure Traveler to have participated in most outdoor activities while on trips. Relative to the average Canadian Pleasure Traveler, those who participated in ocean activities while on trips were especially likely to have participated in water-related activities (e.g., boating and swimming, sailing and surfing, freshwater scuba diving and snorkeling). They also exhibit above-average participation rates in family-oriented outdoor activities such as horseback riding, hiking, climbing and paddling, sports and games and cycling.

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

	Participated in Ocean Activities	Did Not Participate in Ocean Activities	Pleasure Travelers	Index
Size of Market	8,951,385	9,488,124	18,439,508	100
Boating & Swimming (e.g., motorboating, swimming in lakes)	61.5%	21.9%	41.1%	150
Wildlife Viewing	54.5%	28.8%	41.2%	132
Hiking, Climbing & Paddling	48.2%	20.7%	34.1%	142
Sports & Games (e.g., tennis, board games)	33.2%	12.9%	22.7%	146
Fishing	27.8%	19.6%	23.6%	118
Exercising & Jogging	23.5%	8.7%	15.9%	148
Golfing	23.1%	13.8%	18.3%	126
Downhill Skiing & Snowboarding	20.9%	8.8%	14.6%	143
Cycling	19.9%	7.5%	13.5%	147
Skating (e.g., ice skating, rollerblading)	18.4%	5.8%	12.0%	154
Team Sports (e.g., hockey, baseball)	14.5%	8.4%	11.4%	127
Cross-country Skiing & Snowshoeing	13.9%	4.9%	9.3%	150
Snowmobiling & ATVing	13.7%	9.1%	11.3%	121
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	10.7%	2.1%	6.3%	171
Horseback Riding	7.5%	2.5%	4.9%	152
Freshwater Scuba & Snorkeling	5.5%	0.7%	3.0%	183
Hunting	4.4%	5.0%	4.7%	93
Motorcycling	4.2%	1.9%	3.0%	140
Wilderness Activities (e.g., wilderness skills course)	3.3%	1.5%	2.4%	140
Extreme Air Sports (e.g., parachuting)	1.4%	0.9%	1.1%	124

Outdoor Activities Pursued in a Typical Year

Those who participated in ocean activities while on trips are also moderately active in outdoor activities while not traveling. In addition to going swimming, the majority in this segment went on day outings to parks and picnicking, exercised at home or at a fitness club, went hiking and cycling and gardened at home. Relative to the average Canadian Pleasure Traveler, this segment was particularly likely to have participated in water-based summer activities (e.g., canoeing and kayaking, swimming, sailing and other boating) and winter skiing activities (downhill skiing, cross-country skiing) while not traveling.

Fig. 7 Outdoor Activities Pursued in a Typical Year

	Participated in Ocean Activities	Did Not Participate in Ocean Activities	Pleasure Travelers	Index
Size of Market	8,951,385	9,488,124	18,439,508	100
Day outing to a park	72.7%	61.3%	66.9%	109
Swimming	71.0%	50.2%	60.3%	118
Exercising at home or at a fitness club	65.9%	56.3%	61.0%	108
Gardening	62.1%	57.6%	59.8%	104
Picnicking	57.9%	48.5%	53.1%	109
Hiking	56.2%	41.8%	48.8%	115
Cycling	51.6%	37.4%	44.3%	116
Camping	44.1%	33.4%	38.6%	114
Ice-skating	34.3%	23.0%	28.5%	120
Golfing	32.7%	26.2%	29.4%	111
Jogging	28.9%	19.5%	24.1%	120
Fishing	28.9%	29.7%	29.3%	99
Sailing or other boating	27.6%	19.6%	23.4%	118
Playing team sports	26.7%	19.4%	22.9%	116
Playing racquet sports (e.g., tennis or badminton)	22.7%	15.8%	19.1%	118
Canoeing or kayaking	21.6%	12.5%	16.9%	128
Downhill skiing	21.0%	11.7%	16.2%	130
Rollerblading	17.8%	11.1%	14.4%	124
Cross-country skiing	14.9%	10.2%	12.5%	120
Riding an all-terrain vehicle (ATV)	12.9%	15.6%	14.3%	90
Snowmobiling	9.2%	10.3%	9.8%	94
Horseback riding	7.9%	5.8%	6.8%	116
Hunting	6.2%	9.2%	7.7%	80
Snowboarding	5.9%	4.2%	5.0%	117
Skateboarding	1.6%	1.6%	1.6%	102

Culture and Entertainment Activities Pursued While on Trips

Those who participated in ocean activities on trips in the past two years were more active than the average Canadian Pleasure Traveler in most culture and entertainment pursuits while traveling. Relative to the average Canadian Pleasure Traveler, they were especially likely to visit family-oriented, educational attractions (e.g., theme parks & exhibits, science & technology exhibits, aboriginal cultural experiences, participatory historical activities), fairs and festivals, and live-art performances (e.g., musical concerts, festivals & attractions; live theatre, comedy festivals and clubs). They were also more likely to participate in wine, beer and food tastings and visit day spas 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)

	Participated in Ocean Activities	Did Not Participate in Ocean Activities	Pleasure Travelers	Index
Size of Market	8,951,385	9,488,124	18,439,508	100
Shopping & Dining	90.8%	75.4%	82.9%	110
Historical Sites, Museums & Art Galleries	68.6%	48.6%	58.3%	118
Theme Parks & Exhibits	49.2%	29.7%	39.2%	126
Fairs & Festivals	47.5%	28.4%	37.7%	126
Musical Concerts, Festivals & Attractions	42.7%	23.4%	32.7%	130
Wine, Beer & Food Tastings	30.7%	17.3%	23.8%	129
Casinos	30.2%	21.9%	25.9%	117
Science & Technology Exhibits	27.8%	18.8%	23.1%	120
Live Theatre	27.0%	15.5%	21.1%	128
Garden Theme Attractions	21.3%	14.1%	17.6%	121
Professional Sporting Events	19.9%	11.7%	15.7%	127
Agro-Tourism	18.3%	13.2%	15.7%	117
Aboriginal Cultural Experiences	15.7%	7.7%	11.6%	136
Amateur Tournaments	15.2%	8.6%	11.8%	128
Spas	15.1%	5.3%	10.0%	150
High Art Performances	14.6%	7.5%	11.0%	133
Comedy Festivals & Clubs	13.7%	6.7%	10.1%	136
Participatory Historical Activities	9.2%	4.3%	6.7%	137
Equestrian & Western Events	8.3%	5.2%	6.7%	124
National & International Sporting Events	4.0%	2.4%	3.2%	126
Literary & Film Festivals	3.4%	1.8%	2.6%	133

Culture and Entertainment Activities Pursued in a Typical Year

While not traveling, those who participated in ocean activities were only slightly more active than the average Canadian Pleasure Traveler in local culture and entertainment activities. The majority dined in restaurants and visited festivals and fairs, but only marginally more often than the average Canadian Pleasure Traveler. However, they were more likely to visit local spas and attend local, live rock and jazz performances (e.g., bars with live pop or rock bands, rock music concerts, jazz clubs) than the typical Canadian Pleasure Traveler.

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

	Participated in Ocean Activities	Did Not Participate in Ocean Activities	Pleasure Travelers	Index
Size of Market	8,951,385	9,488,124	18,439,508	100
Going out to eat in restaurants	93.4%	89.7%	91.5%	102
Going to festivals or fairs	65.5%	57.6%	61.4%	107
Going to amateur sporting events	47.4%	36.9%	42.0%	113
Going to pick-your-own farms or farmers' market	42.7%	39.4%	41.0%	104
Going to historic sites or heritage buildings	40.3%	38.4%	39.3%	102
Going to live theatre	38.5%	31.3%	34.8%	111
Going to professional sporting events	36.6%	27.7%	32.1%	114
Going to museums	35.0%	30.5%	32.7%	107
Going dancing	34.8%	25.2%	29.9%	117
Going to art galleries or art shows	34.3%	29.4%	31.8%	108
Going to bars with live pop or rock bands	33.9%	21.9%	27.7%	122
Going to amusement or theme parks	33.1%	24.9%	28.9%	115
Going to zoos or aquariums	33.1%	27.9%	30.4%	109
Going to rock music concerts	27.4%	17.7%	22.4%	122
Going to botanical gardens	26.0%	24.8%	25.4%	102
Going to gamble in casinos	17.9%	18.3%	18.1%	99
Going to day spas	17.9%	9.8%	13.8%	130
Going to classical music concerts	17.1%	15.9%	16.5%	104
Staying overnight in a hotel or B&B in own city	10.9%	8.9%	9.9%	111
Going to jazz clubs	9.1%	6.0%	7.5%	121
Going to the ballet	8.0%	6.6%	7.3%	110
Going to the opera	7.1%	6.2%	6.6%	107
Going to rodeos	7.1%	7.6%	7.3%	96

Accommodation Stayed In While on a Trip

Relative to the average Canadian Pleasure Traveler, those who participated in ocean activities while on trips were especially likely to stay at seaside resorts. Public campgrounds were also popular within this segment. Those who participated in ocean activities while on trips were also more likely than average to stay in other types of resorts (e.g., lakeside or riverside, ski or mountain) and at health spas.

Fig. 10 Accommodation Stayed in While on Trips

	Participated in Ocean Activities	Did Not Participate in Ocean Activities	Pleasure Travelers	Index
Size of Market	8,951,385	9,488,124	18,439,508	100
Seaside Resort	34.9%	7.4%	20.7%	168
A Public Campground in a National, State, Provincial or Municipal Park	34.8%	18.4%	26.4%	132
Lakeside / Riverside Resort	29.6%	15.4%	22.3%	133
A Private Campground	23.7%	14.2%	18.8%	126
Ski Resort or Mountain Resort	19.4%	8.9%	13.9%	139
A Camp Site in a Wilderness Setting (Not a Campground)	10.2%	7.1%	8.6%	118
Health Spa	8.2%	3.8%	5.9%	138
Wilderness Lodge You Can Drive to by Car	6.9%	4.4%	5.6%	123
Country Inn or Resort with Gourmet Restaurant	6.6%	3.7%	5.1%	130
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	5.2%	3.8%	4.5%	116
Farm or Guest Ranch	3.7%	2.4%	3.0%	122
Remote or Fly-In Wilderness Lodge	2.0%	1.2%	1.6%	127
On a Houseboat	1.8%	0.9%	1.4%	134
Remote or Fly-In Wilderness Outpost	0.7%	0.4%	0.6%	123
Cooking School	0.5%	0.2%	0.4%	141
Wine Tasting School	0.4%	0.1%	0.3%	152

Tours and Cruises Taken During Past Two Years

Those who participated in ocean activities while on trips frequently took tours and cruises in the past two years. Self-guided and guided sameday tours were the most popular tours, followed by city tours, scenic countryside drives and self-guided, multi-location overnight tours. Relative to the average Canadian Pleasure Traveler, this outdoor activity segment was especially likely to have taken water-based sightseeing cruises, Caribbean ocean cruises and wilderness tours.

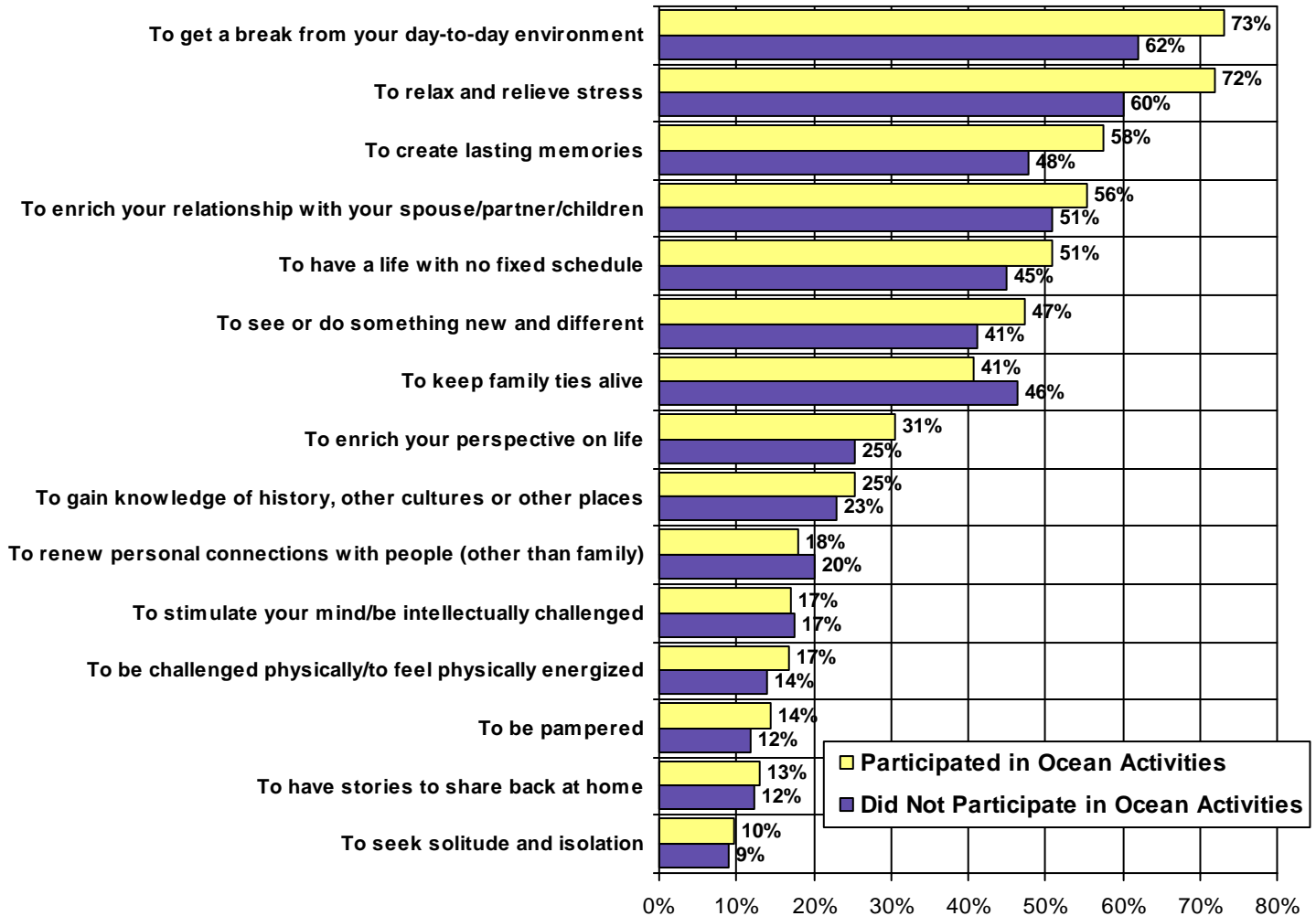
Fig. 11 Tours and Cruises Taken During Past Two Years

	Participated in Ocean Activities	Did Not Participate in Ocean Activities	Pleasure Travelers	Index
Size of Market	8,951,385	9,488,124	18,439,508	100
A self-guided, sameday tour while on an overnight trip	38.2%	20.9%	29.3%	130
An organized, sameday, guided tour while on an overnight trip	30.9%	14.0%	22.2%	139
Around the city	30.2%	16.9%	23.4%	129
Around the countryside - scenic drives	29.1%	16.2%	22.4%	129
A self-guided, overnight tour where you stayed in different locations	22.5%	13.9%	18.1%	124
On the water (sightseeing cruise)	19.1%	7.4%	13.1%	146
Wilderness tour	18.2%	8.1%	13.0%	140
Some other type of tour	13.9%	6.0%	9.8%	141
An organized, overnight, guided tour where you stayed in different locations	11.9%	8.4%	10.1%	118
An organized, overnight, guided tour where you stayed in a single location	9.8%	6.0%	7.8%	125
Caribbean ocean cruise	8.1%	2.9%	5.4%	149
To a casino	7.6%	5.5%	6.5%	116
To a winery	7.3%	4.1%	5.6%	130
Ocean cruise – Other	4.4%	2.3%	3.3%	131
To a factory	3.9%	1.5%	2.6%	146
In the air as a pilot or passenger of an airplane or helicopter	2.7%	1.1%	1.9%	145
Cruise on another lake or river	2.6%	2.1%	2.4%	111
Cruise on the St. Lawrence River	1.9%	1.9%	1.9%	100
Some other type of cruise	1.9%	1.3%	1.6%	121
Alaskan ocean cruise	1.5%	1.8%	1.6%	90
Great Lakes cruise	0.7%	0.9%	0.8%	86
Submarine cruise	0.2%	0.1%	0.1%	117

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travelers, the majority of those who participated in ocean activities 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 enrich family relationships and to live without a fixed schedule. Relative to other Canadian Pleasure Travelers, this segment considers it especially important that a vacation provides an opportunity to relax and unwind (e.g., get a break from their daily environment, relieve stress, have no fixed schedule). They are also more likely to consider it important that a vacation creates lasting memories, provides an opportunity to see or do something new and different and enriches their perspective on life.

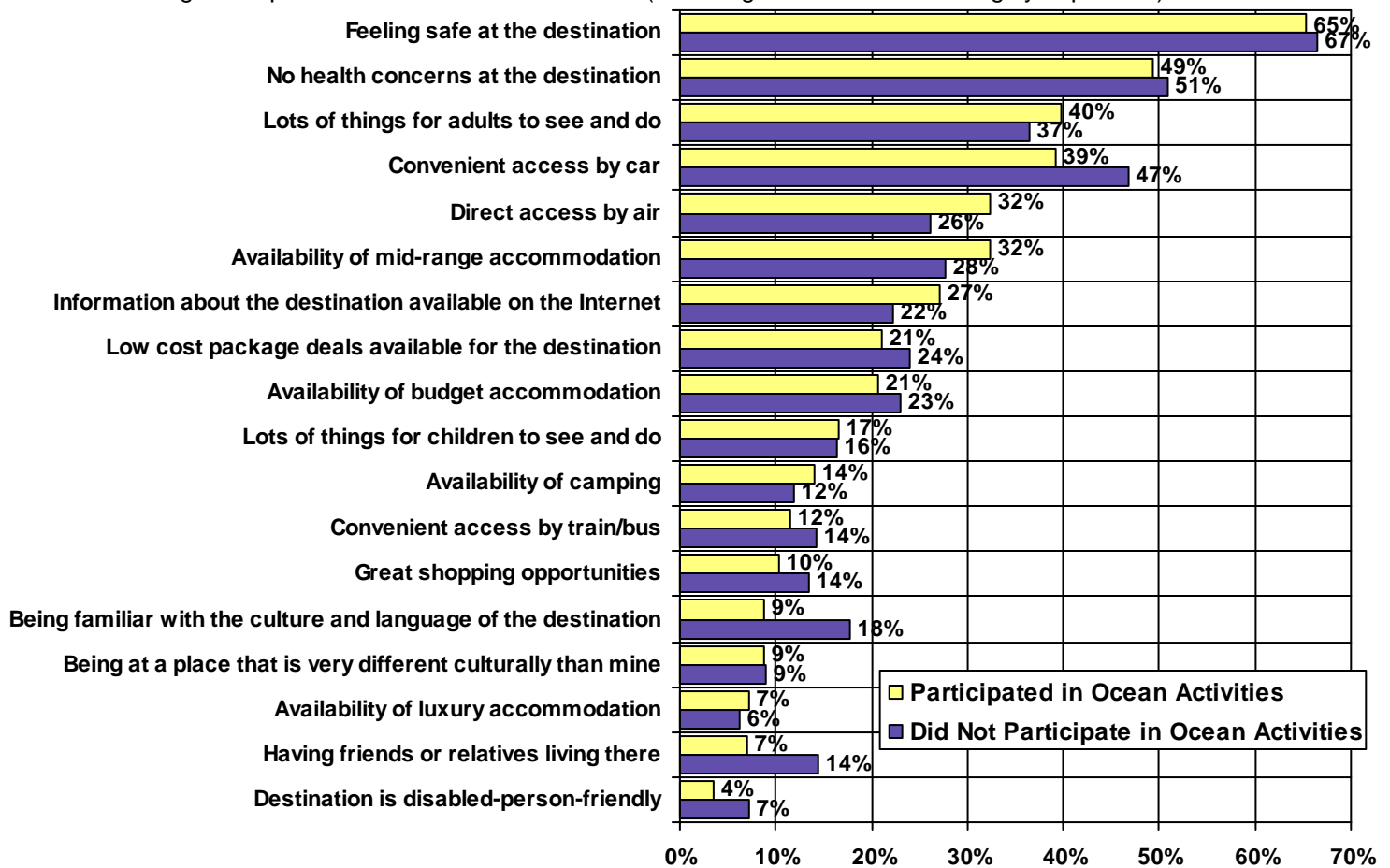
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

Similar to other Canadian Pleasure Travelers, the majority of those who participated in ocean activities consider it important that they feel safe at a destination. Relative to other Canadian Pleasure Travelers, this segment considers it important that a destination is directly accessible by air, offers mid-priced accommodation and provides information concerning the destination on the Internet. They are less likely than others to consider it important that a destination is conveniently accessible by car, has a familiar culture and language and has friends and family 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, those who participated in ocean activities while on trips tend to start planning trips with a particular destination in mind. They are next more likely to begin vacation planning with a particular type of vacation experience in mind. In addition, this segment may be somewhat more responsive to winter travel discount packages than the average Canadian Pleasure Traveler.

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

	Participated in Ocean Activities	Did Not Participate in Ocean Activities	Pleasure Travelers	Index
Size of Market	8,951,385	9,488,124	18,439,508	100
Summer				
Started with a desired destination in mind	48.9%	48.0%	48.5%	101
Started by considering specific activities wanted to do	14.6%	13.0%	13.8%	106
Started with a certain type of vacation experience in mind	25.7%	21.7%	23.7%	108
Looked for packaged deals - no destination in mind	1.1%	1.5%	1.3%	83
Considered something else first	3.8%	4.8%	4.3%	89
Don't know / Other	6.0%	11.0%	8.4%	71
Winter				
Started with a desired destination in mind	48.6%	48.6%	48.6%	100
Started by considering specific activities wanted to do	16.5%	14.4%	15.6%	106
Started with a certain type of vacation experience in mind	20.6%	17.6%	19.3%	107
Looked for packaged deals - no destination in mind	4.0%	2.1%	3.2%	126
Considered something else first	3.8%	5.8%	4.7%	81
Don't know / Other	6.5%	11.4%	8.6%	75

Trip Planning and Information Sources Consulted

The majority of those who participated in ocean activities while on trips were responsible for planning their trips either on their own (42.2%) or with someone else (15.5%). When making vacation plans, they tend to consult a wider variety of information sources than the average Canadian Pleasure Traveler. The majority used Internet websites, word-of-mouth and past experiences to plan travel. However, they are more likely than average to obtain trip planning information from travel guidebooks such as Fodor's, television programs, travel agents and email newsletters or magazines.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Participated in Ocean Activities	Did Not Participate in Ocean Activities	Pleasure Travelers	Index
Size of Market		8,951,385	9,488,124	18,439,508	100
Who Plans Trips?	Respondent plans trips	42.3%	41.8%	42.0%	101
	Trip planning a shared responsibility	15.5%	17.4%	16.4%	94
	Someone else plans trips	42.2%	40.8%	41.5%	102
Information Sources Consulted	An Internet website	76.1%	54.1%	65.2%	117
	Advice of others / Word-of-mouth	60.2%	41.9%	51.1%	118
	Past experience / Been there before	57.3%	43.4%	50.4%	114
	A travel agent	44.0%	24.0%	34.1%	129
	Maps	35.5%	29.5%	32.6%	109
	Official travel guides or brochures from state / province	31.2%	20.6%	26.0%	120
	Visitor information centres	27.5%	19.2%	23.4%	117
	Articles in newspapers / magazines	25.3%	16.3%	20.9%	121
	An auto club such as CAA	20.1%	15.2%	17.7%	114
	Travel guide books such as Fodor's	17.9%	9.2%	13.6%	132
	Advertisements in newspapers / magazines	17.2%	11.2%	14.3%	121
	Travel information received in the mail	10.2%	7.4%	8.8%	116
	Programs on television	9.8%	5.2%	7.5%	130
	An electronic newsletter or magazine received by e-mail	5.5%	2.9%	4.2%	131
	Advertisements on television	5.2%	4.8%	5.0%	104
Visits to trade, travel or sports shows	3.8%	2.4%	3.1%	121	

Use of the Internet to Plan and Arrange Trips

Those who participated in ocean activities while on trips are more likely than the average Canadian Pleasure Traveler to use the Internet to plan (71.5%) or book travel (47.1%).

The majority use hotel or resort websites, the tourism websites of specific countries, regions or cities, travel planning or booking websites (e.g., Expedia) and airline websites. They are also slightly more likely than average to use cruise line websites.

The most commonly purchased trip components include airline tickets and accommodation.

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

		Participated in Ocean Activities	Did Not Participate in Ocean Activities	Pleasure Travelers	Index
	Size of Market	8,951,385	9,488,124	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	28.4%	52.5%	40.8%	70
	Uses Internet to plan trips only	24.4%	20.0%	22.1%	110
	Uses Internet to book part of trip	47.1%	27.5%	37.0%	127
Types of Websites Consulted	A website of a hotel or resort	61.3%	50.8%	57.0%	107
	A tourism website of a country / region / city	53.3%	44.7%	49.8%	107
	A travel planning/booking website	51.3%	37.6%	45.7%	112
	An airline website	50.5%	40.3%	46.3%	109
	A website of an attraction	35.5%	33.0%	34.5%	103
	Some other website	27.8%	27.3%	27.6%	101
	A cruise line website	9.8%	5.5%	8.1%	122
A motorcoach website	2.5%	2.3%	2.5%	103	
Parts of Trips Booked Over The Internet	Air tickets	71.8%	65.7%	69.5%	103
	Accommodation	71.7%	65.0%	69.2%	104
	Car rental	28.8%	24.5%	27.1%	106
	Tickets or fees for specific activities or attractions	24.7%	21.9%	23.6%	105
	A package containing two or more items	18.2%	10.8%	15.4%	118
	Tickets for rail, bus or boat /ship fares	16.5%	13.4%	15.3%	108
	Other	4.2%	3.6%	3.9%	106

Media Consumption Habits

Those who participated in ocean activities while on trips were somewhat more likely than the average Canadian Pleasure Traveler to read the travel sections of daily and weekend newspapers and travel magazines, to visit travel websites, and to watch travel shows on television. Therefore the travel-media is an effective channel by which to reach this segment. They may also be effectively targeted through popular entertainment and music media (e.g., entertainment & music magazines, entertainment websites, top 40 & current hits radio) and magazines focusing on city lifestyles, fashion and beauty.

Fig. 17 Media Consumption Habits

		Participated in Ocean Activities	Did Not Participate in Ocean Activities	Pleasure Travelers	Index
Size of Market		8,951,385	9,488,124	18,439,508	100
Newspaper Readership	Reads daily newspaper	87.0%	87.6%	87.3%	100
	Reads weekend edition of newspaper	87.4%	87.2%	87.3%	100
	Reads local neighbourhood or community newspapers	62.4%	60.7%	61.5%	101
	Reads other types of newspapers	16.7%	17.6%	17.2%	97
	Frequently or occasionally reads travel section of daily newspaper	49.9%	41.8%	45.7%	109
	Frequently or occasionally reads travel section of weekend newspaper	52.7%	42.3%	47.3%	111
Types of Magazines Read (Top 5 Indexed)	Travel (e.g., Condé Nast)	14.0%	9.7%	11.8%	119
	Magazines about your city	13.8%	10.3%	12.0%	115
	Fashion and beauty	27.2%	20.3%	23.7%	115
	Entertainment and music	36.5%	28.6%	32.4%	113
	Business, finance and investing	18.2%	14.5%	16.3%	112
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	33.7%	27.1%	30.3%	111
	Reality shows (e.g., Canadian Idol)	43.3%	36.5%	39.8%	109
	Situation comedies (e.g., Friends)	54.7%	48.0%	51.3%	107
	Dramas (e.g., Law & Order)	61.0%	53.7%	57.3%	107
	Late night talk shows	29.2%	25.9%	27.5%	106
Type of Radio Programs Listened To (Top 5 Indexed)	Top 40 / Current hits	30.4%	20.2%	25.2%	121
	Modern rock / Alternative rock	44.0%	30.6%	37.1%	119
	Jazz / Big band	9.9%	7.7%	8.8%	113
	Soft music / Adult contemporary	28.0%	23.6%	25.7%	109
	All sports	11.9%	10.3%	11.1%	107
Types of Websites Visited (Top 5 Indexed)	Travel	59.0%	41.2%	50.6%	117
	House and home	29.7%	26.4%	28.1%	106
	Weather	58.9%	52.9%	56.1%	105
	Shopping (all types)	34.9%	32.0%	33.5%	104
	Entertainment	53.6%	49.2%	51.5%	104

Appendix One: Canadian TAMS 2006 Outdoor Activity Segmentation

Activity Segment	Activities in Segment	
Golfing	Played During a Stay at a Golf Resort with Overnight Stay	Golf Tour Package to Play on Various Courses
	Played an Occasional Game While on a Trip	
Hunting	Hunting for Small Game	Hunting for Birds
	Hunting for Big Game	
Fishing	Fresh-Water Fishing	Salt-Water Fishing
	Ice Fishing	Trophy Fishing
Wildlife Viewing	Viewing Land Based Animals	Bird Watching
	Whale Watching & Other Marine Life	Visited National, Provincial/State Park
	Wildflowers/Flora Viewing	Viewing Northern Lights
Hiking, Climbing & Paddling	Mountain Climbing/Trekking	Fresh Water Kayaking/Canoeing
	Rock Climbing	Ocean Kayaking / Canoeing
	Hiking/Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
		White Water Rafting
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkeling in Sea/Ocean
	Sunbathing, Sitting on a Beach	Scuba Diving in Sea/Ocean
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Freshwater Scuba & Snorkeling	Scuba Diving in Lakes/Rivers	Snorkeling in Lakes/Rivers
Exercising & Jogging	Working Out in Fitness Centre	Jogging or Exercising Outdoors
Cycling	Overnight Touring Trip	Recreational - Same Day Excursion
	Mountain Biking	
Motorcycling	Overnight Touring Trip	Same Day Excursion
Horseback Riding	With an Overnight Stop	Same Day Excursion
Snowmobiling & ATVing	All Terrain Vehicle - Overnight Touring Trip	Snowmobiling As an Overnight Touring Trip
	All Terrain Vehicle - Same Day Excursion	Snowmobiling Day Use on Organized Trail
Downhill Skiing & Snowboarding	Snowboarding	Downhill Skiing
Cross-country Skiing & Snowshoeing	Cross-country Skiing	Cross-country or Back Country as an Overnight Touring Trip
	Snowshoeing	
Wilderness Activities	Wilderness Skills Courses	Dog Sledding
	Ice Climbing	
Skating	Ice Skating	In-Line/Rollerblading
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	
Team Sports	Ice Hockey	Curling
	Football	Basketball
	Baseball or Softball	Soccer
Sports & Games	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	

Appendix Two Canadian TAMS 2006 Culture and Entertainment Segmentation		
Activity Segment	Activities in Segment	
Historical Sites, Museums & Art Galleries	Well-known Historic Sites or Buildings	Well-known Natural Wonders
	Other Historic Sites, Monuments and Buildings	Historical Replicas of Cities or Towns With Historic Re-Enactments
	Strolling Around a City to Observe Buildings and Architecture	Museum - Military /War Museums
	Museum - General History or Heritage Museums	Art Galleries
		Paleontological/Archaeological Sites
Shopping & Dining	Shop Or Browse - Bookstore or Music Store	Shop Or Browse – Antiques
	Shop Or Browse - Clothing, Shoes and Jewellery	Shop Or Browse - Gourmet Foods in Retail Stores
	Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	Shop Or Browse - Greenhouse or Garden Centre
	Dining - Restaurants Offering Local Ingredients and Recipes	High-End Restaurants with an International Reputation
	Went to Local Outdoor Cafes	Other High-End Restaurants
Aboriginal Cultural Experiences	Aboriginal Cuisine (Tasted or Sampled)	Aboriginal Arts and Crafts Shows
	Aboriginal Heritage Attractions (e.g., Museums, Interpretive Centres)	Aboriginal Cultural Experiences in a Remote or Rural Setting
	Aboriginal Festivals & Events (e.g., Powwows)	Aboriginal Outdoor Adventure and /or Sports
Fairs & Festivals	Farmers' Markets or Country Fairs	Firework Displays
	Carnivals	Ethnic Festivals
	Exhibition or Fairs	Food/Drink Festivals
Science & Technology Exhibits	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
Theme Parks & Exhibits	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Entertainment Farms (e.g., Corn Maze, Petting Zoo)
	Wax Museums	
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	Professional Soccer Games
Live Theatre	Live Theatre	Live Theatre with Dinner
	Theatre Festivals	
Literary & Film Festivals	Literary Festivals or Events	International Film Festivals
Tastings	Went to Wineries for Day Visits and Tasting	Cooking /Wine Tasting Courses
	Went to Breweries for Day Visits and Tasting	Visited Food Processing Plants (e.g., Cheese Factory)
Casinos	Went to a Casino	
Spas	Day Visit to a Health & Wellness Spas while on an Overnight Trip	
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National /Provincial Park
	Curatorial Tours	Archaeological Digs
Equestrian & Western	Equine (Horse) Competitions	Western Theme Events (e.g., Rodeos)

Appendix Two		
Canadian TAMS 2006 Culture and Entertainment Segmentation		
Events	Horse Races	
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