

CANADIAN TRAVEL MARKET

Sailing and Surfing While on Trips Of One or More Nights

A Profile Report

October 18, 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



Sailing and Surfing While on Trips

Executive Summary

Over the last two years, 4.7% (1,159,884) of adult Canadians went sailing or surfing while on an out-of-town, overnight trip of one or more nights. Sailing and surfing was the 15th most common outdoor activity pursued by Canadian Pleasure Travelers during this time. Sailing activities (3.3% sailing, 1.0% parasailing) were more popular than surfing activities (0.8% windsurfing, 0.2% kite surfing). Of those who went sailing, 30.0% stated that this activity was the main reason for taking at least one trip in the past two years.

Relative to the average Canadian Pleasure Traveler, Sailors and Surfers are somewhat more likely to be male (53.8%), 18 to 44 years of age and married. They are over-represented among Young Singles and Young Couples and are less likely than average to have dependent children (under 18) living at home. This outdoor activity type is affluent with an above-average level of education (43.1% have a university degree – ranked 3rd of the 21 outdoor activity types) and household incomes (\$85,891 ranked 4th of the 21 outdoor activity types). They are well-represented across Canada.

Sailors and Surfers are frequent out-of-country travelers and the most likely of the 21 outdoor activity types to have taken a trip to the Caribbean (35.7%) in the past two years. They were the second most likely to have visited Mexico (24.9%) and the 5th most likely to have traveled to the United States (64.6%). Sailors and Surfers also travel extensively in Canada and were the 6th most likely to have taken a trip to a non-adjacent province or region (39.9%) although travel within their own province or region (91.7%) was ranked 16th out of the 21 outdoor activity types. They were especially likely to have visited the Atlantic Provinces and Alberta.

Sailors and Surfers pursue a very wide variety of outdoor and culture and entertainment activities while on trips. Relative to the average Canadian Pleasure Traveler, Sailors and Surfers are especially active in high-energy, strenuous activities (e.g., extreme air sports, downhill skiing and snowboarding, exercise and jogging) and water-based activities (e.g., fresh water scuba and snorkeling, boating & swimming). They were also very active in cultural pursuits (e.g., high art performances, literary and film festivals) and entertainment activities (e.g., wine, beer & food tastings). They exhibit a preference for seaside resorts, health spas and wilderness accommodation and were much more likely than average to take tours and cruises. They seek novel, intellectually stimulating and physically energizing vacations.

Sailors and Surfers are among the heaviest users of the Internet to plan (78.9%) and book travel (55.0%). They avidly consume travel information and may also be reached through media related to outdoor activities, photography and videos and business.

Sailing and Surfing While on Trips

Market Incidence

Over the last two years, 4.7% (1,159,884) of adult Canadians went sailing or surfing while on an out-of-town, overnight trip of one or more nights. Sailing and surfing is a relatively uncommon outdoor activity and the 15th most common outdoor activity pursued by Canadian Pleasure Travelers in the past two years. Sailing (3.3%) was the most popular activity, followed by parasailing (1.0%), windsurfing (0.8%) and kite surfing (0.2%). Among those who participated in these activities, only sailing (30.0%) and windsurfing (13.6%) were cited as being the main reason for taking at least one trip over the last two years.

Fig. 1 Incidence of Sailing and Surfing While on Trips¹

	Number of Sailors and Surfers ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	1,159,884	270,446	18,439,508	24,776,103
Sailing and Surfing (All Activities)	1,159,884	23.3%	6.3%	4.7%
Sailing	820,172	30.0%	4.4%	3.3%
Parasailing	237,427	0.0%	1.3%	1.0%
Windsurfing	203,758	13.6%	1.1%	0.8%
Kite surfing	51,702	0.0%	0.3%	0.2%
Participated in all four activities	1,520	0.0%	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 - "Sailors and Surfers" are defined as individuals who went sailing or surfing 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

Sailors and Surfers are well-represented in all provinces and regions in Canada. However, they are slightly less likely to live in Manitoba.

Fig. 2 Geographic Distribution of Those Who Sailed or Surfed While on Trips

	Total Population	Estimated Number Who Sailed & Surfed on a Trip	Percent of Pleasure Travelers in Region Who Sailed & Surfed on a Trip	Percent of Total Regional Population Who Sailed & Surfed on a Trip
Canada	24,776,103	1,159,884	6.3%	4.7%
Atlantic Provinces	1,822,494	91,078	7.2%	5.0%
Quebec	5,940,869	248,486	5.9%	4.2%
Ontario	9,671,592	471,154	6.6%	4.9%
Manitoba	843,107	26,461	4.4%	3.1%
Saskatchewan	706,325	33,333	6.2%	4.7%
Alberta	2,465,540	130,650	6.5%	5.3%
British Columbia	3,326,176	158,722	6.0%	4.8%

Demographic Profile

Relative to the average Canadian Pleasure Traveler, Sailors and Surfers are more likely to be males (53.8%), 18 to 44 years of age, and married. They are over-represented among Young Singles and Young Couples and are less likely than average to have dependent children (under 18) living at home. This is an affluent activity segment with an above-average level of education (43.1% have a university degree – ranked 3rd of the 21 outdoor activity types) and above-average household incomes (\$85,891 ranked 4th of the 21 outdoor activity types).

Fig. 3 Demographic Profile of Sailors and Surfers Relative to All Canadian Pleasure Travelers

Attribute	Size of Market	Sailors and Surfers	Non-Sailors and Surfers ¹	Pleasure Travelers	Index ²
		1,159,884	17,279,625	18,439,508	100
Gender	Male	53.8%	48.5%	48.8%	110
	Female	46.2%	51.5%	51.2%	90
Age of Respondent	18 to 24	17.2%	12.5%	12.8%	134
	25 to 34	21.6%	19.1%	19.3%	112
	35 to 44	22.8%	20.4%	20.5%	111
	45 to 54	20.7%	20.3%	20.3%	102
	55 to 64	11.7%	14.3%	14.1%	83
	65 Plus	6.1%	13.4%	12.9%	47
Average Age		40.7	44.8	44.5	N/A
Marital Status	Not married	31.6%	32.3%	32.2%	98
	Married	68.4%	67.7%	67.8%	101
Parental Status	No children under 18	73.7%	70.9%	71.1%	104
	Children under 18	26.3%	29.1%	28.9%	91
Education	High school or less	23.7%	37.1%	36.2%	65
	Some post-secondary	13.6%	11.0%	11.2%	122
	Post-secondary diploma/certificate	19.6%	22.0%	21.9%	90
	University degree	43.1%	29.9%	30.7%	140
Household Income	Under \$20,000	6.3%	5.7%	5.7%	110
	\$20,000 to \$39,999	9.3%	14.8%	14.5%	64
	\$40,000 to \$59,999	9.1%	17.0%	16.5%	55
	\$60,000 to \$79,999	13.0%	15.4%	15.2%	85
	\$80,000 to \$99,999	11.0%	12.3%	12.2%	90
	\$100,000 or more	38.0%	21.8%	22.8%	166
	Not stated	13.3%	13.0%	13.0%	102
Average Household Income		\$85,891	\$71,956	\$72,829	N/A

- 1 - "Non-Sailors and Surfers" 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 go sailing or surfing on any trip. The number of Sailors and Surfers and Non-Sailors and Surfers equals the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Sailors and Surfers in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Sailors and Surfers 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)

Sailors and Surfers are frequent out-of-country travelers and the most likely of the 21 outdoor activity types to have taken a trip to the Caribbean (35.7%) and to overseas destinations (50.5%) in the past two years. They were the second most likely to have visited Mexico (24.9%) and the 5th most likely to have traveled to the United States (64.6%).

Sailors and Surfers also travel extensively in Canada and were the 6th most likely to have taken a trip to a non-adjacent province or region (39.9%). However their travel to adjacent provinces and regions (58.5%) was ranked 9th and their travel within their own province or region (91.7%) was ranked 16th out of the 21 outdoor activity types. They were especially likely to have visited the Atlantic Provinces and Alberta.

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

	Sailors and Surfers	Non-Sailors and Surfers	Pleasure Travelers	Index
Size of Market	1,159,884	17,279,625	18,439,508	100
Canada	97.4%	94.6%	94.8%	103
Took a trip within own province / region	91.7%	85.5%	85.9%	107
Took a trip to an adjacent province / region	58.5%	47.9%	48.6%	120
Took a trip to non-adjacent province / region	39.9%	30.9%	31.4%	127
Newfoundland and Labrador	6.2%	4.2%	4.3%	145
Prince Edward Island	10.5%	6.9%	7.2%	146
New Brunswick	18.3%	11.4%	11.8%	155
Nova Scotia	15.8%	12.5%	12.7%	124
Quebec	48.2%	38.3%	38.9%	124
Ontario	61.7%	53.0%	53.5%	115
Manitoba	10.4%	9.1%	9.2%	114
Saskatchewan	12.7%	11.3%	11.4%	111
Alberta	34.8%	25.2%	25.8%	135
British Columbia	36.5%	30.3%	30.6%	119
Yukon	1.0%	1.0%	1.0%	103
Northwest Territories	0.7%	0.7%	0.7%	106
Nunavut	0.3%	0.3%	0.3%	117
United States	64.6%	49.7%	50.7%	127
Mexico	24.9%	11.5%	12.4%	201
Caribbean	35.7%	14.2%	15.6%	229
All other destinations	38.4%	22.7%	23.6%	162

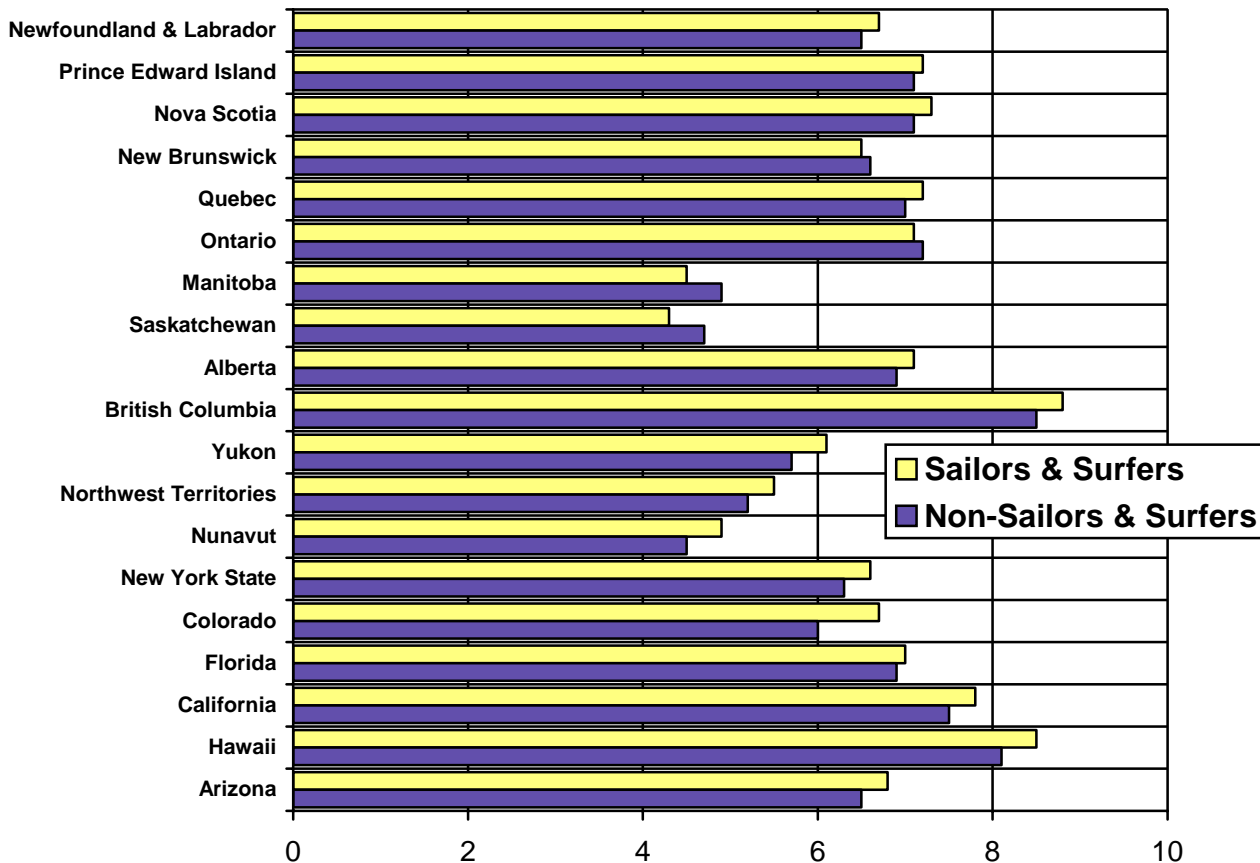
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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 Sailors and Surfers were comparable to those of Non-Sailors and Surfers for most Canadian destinations although they were slightly more likely to perceive British Columbia and the Atlantic Region as appealing.

On the other hand, the U.S. reference states were generally more appealing to Sailors and Surfers than to Non-Sailors and Surfers, and especially Hawaii (8.5), California (7.8) and Colorado (6.7).

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

Sailors and Surfers were much more likely than the average Canadian Pleasure Traveler to participate in almost all outdoor activities when on a trip. The large majority of Sailors and Surfers participated in other water-based activities (e.g., ocean activities, boating & swimming activities), went hiking, climbing and paddling and went wildlife viewing while on trips. Relative to the average Canadian Pleasure Traveler, Sailors and Surfers were two to three times more likely to participate in physically challenging outdoor activities such as downhill skiing and snowboarding, exercising and jogging, cycling, skating, cross-country skiing and snowshoeing, freshwater scuba and snorkeling and extreme air sports. This pattern reflects the fact that this is a young, affluent travel segment, which are attributes associated with high levels of outdoor physical activity while traveling.

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

	Sailors and Surfers	Non-Sailors and Surfers	Pleasure Travelers	Index
Size of Market	1,159,884	17,279,625	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	82.9%	46.2%	48.5%	171
Boating & Swimming (e.g., motorboating, swimming in lakes)	69.7%	39.2%	41.1%	170
Hiking, Climbing & Paddling	62.8%	32.1%	34.1%	184
Wildlife Viewing	59.7%	40.0%	41.2%	145
Sports & Games (e.g., tennis, board games)	40.6%	21.5%	22.7%	179
Downhill Skiing & Snowboarding	37.5%	13.1%	14.6%	256
Exercising & Jogging	34.9%	14.6%	15.9%	220
Fishing	31.8%	23.0%	23.6%	135
Golfing	29.7%	17.5%	18.3%	162
Cycling	29.1%	12.5%	13.5%	215
Skating (e.g., ice skating, rollerblading)	24.7%	11.1%	12.0%	207
Cross-country Skiing & Snowshoeing	22.1%	8.4%	9.3%	238
Snowmobiling & ATVing	20.4%	10.7%	11.3%	180
Team Sports (e.g., hockey, baseball)	19.7%	10.8%	11.4%	174
Horseback Riding	10.9%	4.5%	4.9%	223
Freshwater Scuba & Snorkeling	9.9%	2.6%	3.0%	327
Wilderness Activities (e.g., wilderness skills course)	5.1%	2.2%	2.4%	217
Extreme Air Sports (e.g., parachuting)	4.4%	0.9%	1.1%	387
Hunting	4.3%	4.7%	4.7%	92
Motorcycling	3.8%	2.9%	3.0%	126

Outdoor Activities Pursued in a Typical Year

The high activity level pursued by Sailors and Surfers while on trips is also apparent when they are not traveling. In addition to going sailing or boating, Sailors and Surfers frequently go swimming, take day outings to parks, exercise at home or at a fitness club, and go hiking and cycling. Relative to the average Canadian Pleasure Traveler, Sailors and Surfers were twice as likely to go sailing or boating, canoeing or kayaking, downhill skiing, cross-country skiing, snowboarding and skateboarding while not traveling.

Fig. 7 Outdoor Activities Pursued in a Typical Year

	Sailors and Surfers	Non-Sailors and Surfers	Pleasure Travelers	Index
Size of Market	1,159,884	17,279,625	18,439,508	100
Swimming	79.6%	59.0%	60.3%	132
Day outing to a park	74.1%	66.4%	66.9%	111
Exercising at home or at a fitness club	68.9%	60.5%	61.0%	113
Hiking	67.1%	47.5%	48.8%	138
Cycling	61.5%	43.2%	44.3%	139
Gardening	61.0%	59.7%	59.8%	102
Picnicking	54.1%	53.0%	53.1%	102
Sailing or other boating	51.8%	21.5%	23.4%	221
Camping	49.0%	37.9%	38.6%	127
Jogging	40.2%	23.0%	24.1%	167
Canoeing or kayaking	39.3%	15.4%	16.9%	232
Golfing	37.9%	28.8%	29.4%	129
Downhill skiing	35.8%	14.9%	16.2%	221
Ice-skating	34.9%	28.1%	28.5%	123
Playing team sports	34.6%	22.2%	22.9%	151
Playing racquet sports (e.g., tennis or badminton)	30.9%	18.4%	19.1%	162
Fishing	28.3%	29.3%	29.3%	96
Cross-country skiing	25.1%	11.6%	12.5%	202
Rollerblading	24.4%	13.7%	14.4%	170
Riding an all-terrain vehicle (ATV)	16.1%	14.2%	14.3%	113
Snowboarding	13.9%	4.5%	5.0%	275
Horseback riding	12.8%	6.4%	6.8%	188
Snowmobiling	11.9%	9.6%	9.8%	122
Hunting	5.2%	7.9%	7.7%	68
Skateboarding	3.8%	1.4%	1.6%	240

Culture and Entertainment Activities Pursued While on Trips

Sailors and Surfers are much more active than the average Canadian Pleasure Traveler in culture and entertainment activities when traveling. They frequently went shopping and dining, visited historical sites, museums and art galleries, attended fairs and festivals and visited theme parks & exhibits while on trips. Sailors and Surfers were twice as likely as the average Canadian Pleasure Traveler to visit spas, attend high art performances and literary and film festivals. They were also more likely to attend musical concerts, festivals and attractions, and comedy festivals and clubs, participate in wine, beer and food tastings, attend professional sporting events and take part in participatory historical activities 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)

	Sailors and Surfers	Non-Sailors and Surfers	Pleasure Travelers	Index
Size of Market	1,159,884	17,279,625	18,439,508	100
Shopping & Dining	93.2%	82.2%	82.9%	112
Historical Sites, Museums & Art Galleries	76.5%	57.1%	58.3%	131
Fairs & Festivals	55.0%	36.5%	37.7%	146
Theme Parks & Exhibits	51.9%	38.3%	39.2%	132
Musical Concerts, Festivals & Attractions	49.6%	31.6%	32.7%	151
Wine, Beer & Food Tastings	41.9%	22.6%	23.8%	176
Science & Technology Exhibits	37.0%	22.2%	23.1%	160
Casinos	32.8%	25.4%	25.9%	127
Live Theatre	29.8%	20.5%	21.1%	141
Garden Theme Attractions	27.1%	17.0%	17.6%	154
Professional Sporting Events	24.9%	15.0%	15.7%	159
High Art Performances	22.2%	10.2%	11.0%	202
Spas	19.6%	9.4%	10.0%	195
Amateur Tournaments	19.2%	11.3%	11.8%	163
Agro-Tourism	18.4%	15.5%	15.7%	117
Comedy Festivals & Clubs	17.8%	9.6%	10.1%	175
Aboriginal Cultural Experiences	16.9%	11.2%	11.6%	145
Participatory Historical Activities	11.5%	6.4%	6.7%	171
Equestrian & Western Events	9.6%	6.5%	6.7%	144
National & International Sporting Events	5.5%	3.1%	3.2%	170
Literary & Film Festivals	4.9%	2.4%	2.6%	192

Culture and Entertainment Activities Pursued in a Typical Year

Sailors and Surfers are also quite active in most culture and entertainment pursuits while not traveling. The majority of Sailors and Surfers dine in local restaurants, visit local festivals and fairs and attended local amateur sporting events. Relative to the average Canadian Pleasure Traveler, Sailors and Surfers were especially likely to visit local day spas, attend local rock music and jazz performances (e.g., bars with live pop or rock bands, rock music concerts, jazz clubs), and patronize the local performing arts (e.g., live theatre, classical music concerts, ballet, opera).

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

	Sailors and Surfers	Non-Sailors and Surfers	Pleasure Travelers	Index
Size of Market	1,159,884	17,279,625	18,439,508	100
Going out to eat in restaurants	94.2%	91.3%	91.5%	103
Going to festivals or fairs	66.2%	61.1%	61.4%	108
Going to amateur sporting events	52.9%	41.3%	42.0%	126
Going to bars with live pop or rock bands	44.7%	26.6%	27.7%	161
Going to historic sites or heritage buildings	44.5%	39.0%	39.3%	113
Going to live theatre	42.0%	34.3%	34.8%	121
Going dancing	41.4%	29.1%	29.9%	139
Going to art galleries or art shows	40.7%	31.2%	31.8%	128
Going to museums	40.0%	32.2%	32.7%	122
Going to pick-your-own farms or farmers' market	39.7%	41.1%	41.0%	97
Going to professional sporting events	38.7%	31.6%	32.1%	121
Going to rock music concerts	34.3%	21.6%	22.4%	153
Going to zoos or aquariums	32.1%	30.3%	30.4%	106
Going to botanical gardens	31.4%	25.0%	25.4%	124
Going to amusement or theme parks	27.5%	29.0%	28.9%	95
Going to day spas	23.2%	13.1%	13.8%	169
Going to classical music concerts	22.9%	16.1%	16.5%	139
Going to jazz clubs	16.1%	7.0%	7.5%	214
Going to gamble in casinos	15.5%	18.3%	18.1%	86
Staying overnight in a hotel or B&B in own city	12.5%	9.7%	9.9%	127
Going to the ballet	11.9%	7.0%	7.3%	164
Going to the opera	11.5%	6.3%	6.6%	174
Going to rodeos	9.8%	7.2%	7.3%	134

Accommodation Stayed In While on a Trip

Sailors and Surfers were twice as likely as the average Canadian Pleasure Traveler to have stayed at seaside resorts while on trips in the past two years. Relative to the average Canadian Pleasure Traveler, Sailors and Surfers were particularly likely to stay at several of the more exotic types of accommodation, including health spas and venues that specialize in fine cuisine (e.g. inn or resort with gourmet dining, cooking school, wine tasting school). They were also more likely than the average Canadian Pleasure Traveler to have stayed in a wilderness setting (e.g., campsite, remote or fly-in wilderness lodge or outpost) and on houseboats.

Fig. 10 Accommodation Stayed in While on Trips

	Sailors and Surfers	Non-Sailors and Surfers	Pleasure Travelers	Index
Size of Market	1,159,884	17,279,625	18,439,508	100
Seaside Resort	45.6%	19.1%	20.7%	220
A Public Campground in a National, State, Provincial or Municipal Park	37.3%	25.6%	26.4%	141
Lakeside / Riverside Resort	32.2%	21.6%	22.3%	144
A Private Campground	27.5%	18.2%	18.8%	146
Ski Resort or Mountain Resort	26.7%	13.1%	13.9%	191
A Camp Site in a Wilderness Setting (Not a Campground)	17.0%	8.0%	8.6%	198
Health Spa	10.4%	5.6%	5.9%	175
Country Inn or Resort with Gourmet Restaurant	8.7%	4.8%	5.1%	170
Wilderness Lodge You Can Drive to by Car	7.3%	5.5%	5.6%	129
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	5.2%	4.4%	4.5%	116
Farm or Guest Ranch	4.6%	2.9%	3.0%	153
Remote or Fly-In Wilderness Lodge	3.0%	1.5%	1.6%	188
On a Houseboat	2.9%	1.3%	1.4%	215
Remote or Fly-In Wilderness Outpost	1.6%	0.5%	0.6%	276
Cooking School	0.9%	0.3%	0.4%	254
Wine Tasting School	0.6%	0.2%	0.3%	230

Tours and Cruises Taken During Past Two Years

Sailors and Surfers were more likely than the average Canadian Pleasure Traveler to take all types of tours in the past two years. The most popular tours for this segment were sameday tours (both guided and non-guided), tours around a city, scenic drives in the country, and self-guided, overnight tours. Relative to the average Canadian Pleasure Traveler, Sailors and Surfers were more than twice as likely to have taken a wilderness tour, a winery tour and an air tour in an airplane or helicopter. They were also more than twice as likely to have taken a sightseeing cruise, a Great Lakes cruise and an ocean cruise (other than a Caribbean or Alaskan cruise).

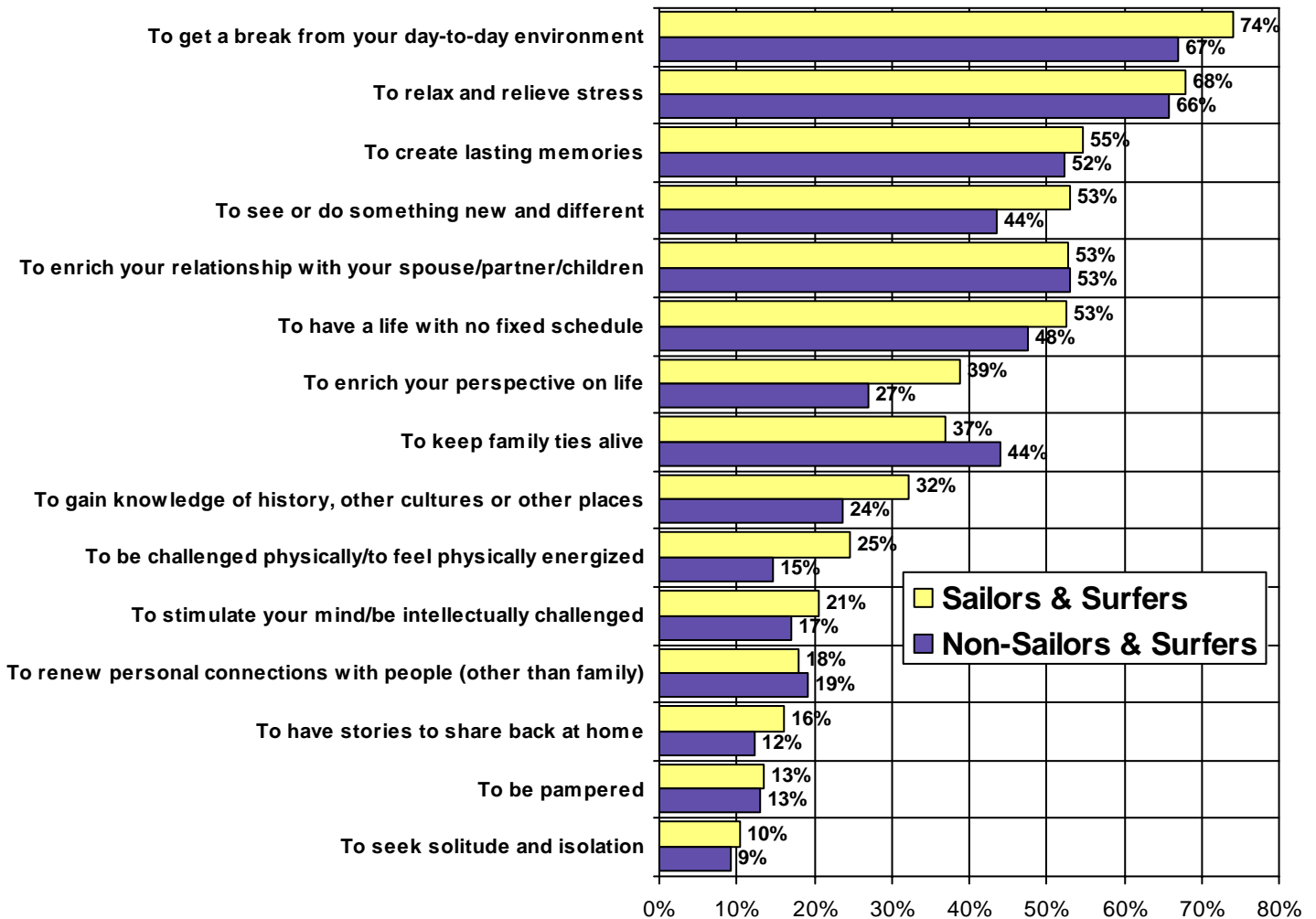
Fig. 11 Tours and Cruises Taken During Past Two Years

	Sailors and Surfers	Non-Sailors and Surfers	Pleasure Travelers	Index
Size of Market	1,159,884	17,279,625	18,439,508	100
A self-guided, sameday tour while on an overnight trip	44.3%	28.3%	29.3%	151
An organized, sameday, guided tour while on an overnight trip	38.9%	21.1%	22.2%	175
Around the city	34.3%	22.6%	23.4%	147
Around the countryside - scenic drives	33.5%	21.7%	22.4%	149
A self-guided, overnight tour where you stayed in different locations	30.9%	17.3%	18.1%	170
Wilderness tour	25.7%	12.2%	13.0%	198
On the water (sightseeing cruise)	24.2%	12.3%	13.1%	185
An organized, overnight, guided tour where you stayed in different locations	16.8%	9.6%	10.1%	166
Some other type of tour	14.0%	9.6%	9.8%	143
An organized, overnight, guided tour where you stayed in a single location	11.6%	7.6%	7.8%	149
To a winery	10.0%	5.4%	5.6%	177
Caribbean ocean cruise	8.0%	5.2%	5.4%	149
To a casino	7.8%	6.4%	6.5%	119
Ocean cruise – Other	6.3%	3.1%	3.3%	191
In the air as a pilot or passenger of an airplane or helicopter	5.3%	1.7%	1.9%	280
To a factory	4.0%	2.6%	2.6%	150
Some other type of cruise	3.4%	1.5%	1.6%	212
Cruise on another lake or river	3.1%	2.3%	2.4%	130
Cruise on the St. Lawrence River	2.3%	1.9%	1.9%	120
Great Lakes cruise	1.8%	0.7%	0.8%	227
Alaskan ocean cruise	1.2%	1.7%	1.6%	76
Submarine cruise	0.2%	0.1%	0.1%	160

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travelers, Sailors and Surfers take vacations to get a break from their day-to-day environment, to relax and relieve stress, to create lasting memories, to see or do something new and different, to enrich family relationships and to live without a fixed schedule. Relative to other Canadian Pleasure Travelers, Sailors and Surfers are particularly more likely to seek novelty (e.g., seeing or doing something new and different), intellectual stimulation (e.g., gain knowledge of history or culture of a destination) and physical challenge.

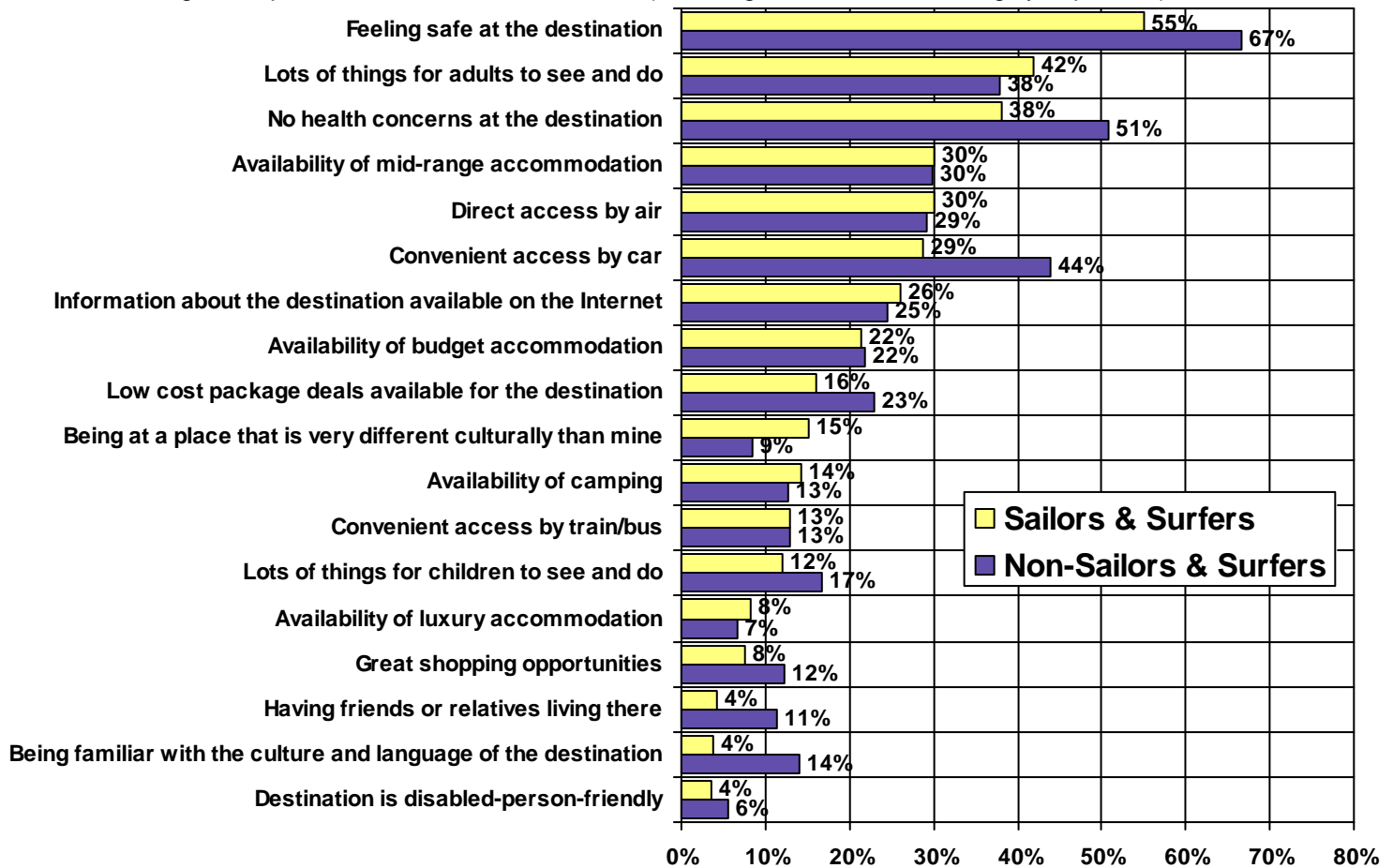
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, Sailors and Surfers consider it important that they feel safe at a destination, but much less so than the average Canadian Pleasure Traveler. Sailors and Surfers seek vacation destinations that have lots of things for adults to see and do and that are culturally different from their own home. Conversely, they are less likely to consider it important that a destination has a lot of things for children to see and do, has a familiar culture and language, is conveniently accessible by car, provides great shopping opportunities 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, Sailors and Surfers tend to start planning vacations with a particular destination in mind. However, for summer trips, they are more likely than others to begin planning by considering what types of vacation experience they would like to have. For winter trips, they are more likely to begin planning by considering what activities that they want to do. They are also more likely than average to look for packaged deals without any specific destination in mind when planning a winter vacation.

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

	Sailors and Surfers	Non-Sailors and Surfers	Pleasure Travelers	Index
Size of Market	1,159,884	17,279,625	18,439,508	100
Summer				
Started with a desired destination in mind	53.9%	48.1%	48.5%	111
Started by considering specific activities wanted to do	16.1%	13.6%	13.8%	116
Started with a certain type of vacation experience in mind	21.6%	23.9%	23.7%	91
Looked for packaged deals - no destination in mind	0.6%	1.4%	1.3%	45
Considered something else first	3.4%	4.4%	4.3%	79
Don't know / Other	4.5%	8.7%	8.4%	53
Winter				
Started with a desired destination in mind	46.5%	48.8%	48.6%	96
Started by considering specific activities wanted to do	23.0%	14.9%	15.6%	148
Started with a certain type of vacation experience in mind	15.9%	19.6%	19.3%	83
Looked for packaged deals - no destination in mind	5.0%	3.0%	3.2%	156
Considered something else first	4.5%	4.7%	4.7%	96
Don't know / Other	5.0%	9.0%	8.6%	58

Trip Planning and Information Sources Consulted

The majority of Sailors and Surfers were responsible for planning their trips either on their own (47.5%) or with someone else (12.3%). Relative to the average Canadian Pleasure Traveler, Sailors and Surfers are more likely to be responsible for planning their own trips.

When making vacation plans, Sailors and Surfers tended to consult a wider variety of sources than the average Canadian Pleasure Traveler. The majority in this segment used Internet websites, word-of-mouth and past experiences to plan travel. Relative to the average Canadian Pleasure Traveler, Sailors and Surfers were especially likely to obtain trip planning information from travel agents, newspaper or magazine articles, travel guidebooks such as Fodor's, email newsletters or magazines and trade, travel or sports shows.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Sailors and Surfers	Non-Sailors and Surfers	Pleasure Travelers	Index
Size of Market		1,159,884	17,279,625	18,439,508	100
Who Plans Trips?	Respondent plans trips	47.5%	41.6%	42.0%	113
	Trip planning a shared responsibility	12.3%	16.7%	16.4%	75
	Someone else plans trips	40.2%	41.6%	41.5%	97
Information Sources Consulted	An Internet website	82.2%	64.0%	65.2%	126
	Advice of others / Word-of-mouth	60.6%	50.5%	51.1%	118
	Past experience / Been there before	56.6%	50.0%	50.4%	112
	A travel agent	49.4%	33.0%	34.1%	145
	Maps	37.9%	32.2%	32.6%	116
	Articles in newspapers / magazines	33.3%	20.0%	20.9%	160
	Official travel guides or brochures from state / province	32.2%	25.5%	26.0%	124
	Visitor information centres	27.0%	23.1%	23.4%	115
	Travel guide books such as Fodor's	22.6%	13.0%	13.6%	166
	Advertisements in newspapers / magazines	21.0%	13.8%	14.3%	147
	An auto club such as CAA	20.1%	17.5%	17.7%	114
	Programs on television	10.9%	7.3%	7.5%	146
	Travel information received in the mail	10.8%	8.7%	8.8%	122
	An electronic newsletter or magazine received by e-mail	7.6%	3.9%	4.2%	182
	Visits to trade, travel or sports shows	6.8%	2.9%	3.1%	217
Advertisements on television	5.6%	5.0%	5.0%	111	

Use of the Internet to Plan and Arrange Trips

Sailors and Surfers were the second most likely of the 21 outdoor activity types to use the Internet to plan travel (78.9%) and the most likely to have used the Internet to book at least a part of a trip (55.0%). The majority of Sailors and Surfers use airline websites, hotel or resort websites, tourism websites of specific countries, regions or cities and travel planning or booking websites (e.g., Expedia). Most of those in this segment who booked trip components over the Internet purchased airline tickets and accommodation. They were also more likely than others to book vacation packages, tickets for specific activities or attractions and fares for rail, bus or boat / ship over the Internet.

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

		Sailors and Surfers	Non-Sailors and Surfers	Pleasure Travelers	Index
Size of Market		1,159,884	17,279,625	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	21.1%	42.2%	40.8%	52
	Uses Internet to plan trips only	23.9%	22.0%	22.1%	108
	Uses Internet to book part of trip	55.0%	35.8%	37.0%	148
Types of Websites Consulted	An airline website	63.3%	44.8%	46.3%	137
	A website of a hotel or resort	62.1%	56.5%	57.0%	109
	A tourism website of a country / region / city	57.2%	49.1%	49.8%	115
	A travel planning / booking website	56.8%	44.7%	45.7%	124
	A website of an attraction	37.0%	34.2%	34.5%	107
	Some other website	26.4%	27.7%	27.6%	96
	A cruise line website	9.7%	7.9%	8.1%	120
Parts of Trips Booked Over The Internet	A motorcoach website	3.2%	2.4%	2.5%	129
	Air tickets	81.1%	68.3%	69.5%	117
	Accommodation	73.8%	68.7%	69.2%	107
	Car rental	33.5%	26.5%	27.1%	123
	Tickets or fees for specific activities or attractions	30.6%	22.9%	23.6%	130
	A package containing two or more items	23.7%	14.5%	15.4%	154
	Tickets for rail, bus or boat/ship fares	21.5%	14.7%	15.3%	140
Other	5.2%	3.8%	3.9%	132	

Media Consumption Habits

Sailors and Surfers are among the most avid consumers of travel-related media of the 21 outdoor activity types. They are more likely than the average Canadian Pleasure Traveler to read the travel sections of daily and weekend newspapers, read travel magazines, visit travel websites and watch travel shows on television. They are also particularly likely to use outdoor-related media, including visiting weather websites, reading outdoor activities and sports magazines and watching science and nature television shows. Other media of particular interest to this segment includes photography and video magazines, business, financing and investing magazines and modern or alternative rock music radio stations.

Fig. 17 Media Consumption Habits

		Sailors and Surfers	Non-Sailors and Surfers	Pleasure Travelers	Index
	Size of Market	1,159,884	17,279,625	18,439,508	100
Newspaper Readership	Reads daily newspaper	87.0%	87.3%	87.3%	100
	Reads weekend edition of newspaper	88.5%	87.2%	87.3%	101
	Reads local neighbourhood or community newspapers	57.5%	61.8%	61.5%	94
	Reads other types of newspapers	17.7%	17.1%	17.2%	103
	Frequently or occasionally reads travel section of daily newspaper	51.9%	45.3%	45.7%	113
	Frequently or occasionally reads travel section of weekend newspaper	57.1%	46.7%	47.3%	121
Types of Magazines Read (Top 5 Indexed)	Photography and video	7.4%	3.8%	4.1%	182
	Outdoor activities / sports	23.4%	12.1%	12.8%	182
	Business, finance and investing	26.8%	15.6%	16.3%	164
	Professional sports	11.8%	8.3%	8.5%	139
	Travel (e.g., Condé Nast)	16.0%	11.5%	11.8%	136
Type of Television Programs Watched (Top 5 Indexed)	Science & nature shows	50.0%	43.4%	43.8%	114
	Travel shows	33.6%	30.1%	30.3%	111
	Movies on TV	74.7%	70.5%	70.8%	106
	Dramas (e.g., Law & Order)	57.2%	57.3%	57.3%	100
	History	41.3%	41.9%	41.8%	99
Type of Radio Programs Listened To (Top 5 Indexed)	Jazz / Big band	14.1%	8.4%	8.8%	161
	Multicultural	10.9%	8.2%	8.4%	131
	Modern rock / Alternative rock	46.9%	36.4%	37.1%	127
	Top 40 / Current hits	30.0%	24.8%	25.2%	119
	Classical music	19.6%	17.1%	17.2%	114
Types of Websites Visited (Top 5 Indexed)	Travel	61.7%	49.7%	50.6%	122
	Sites for specific activities or interests	43.6%	35.2%	35.9%	122
	Weather	65.6%	55.3%	56.1%	117
	Sports	28.2%	26.8%	26.9%	105
	Network news sites (e.g., CBC, CNN)	37.4%	36.0%	36.1%	103

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 and 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