

CANADIAN TRAVEL MARKET

Wilderness Activities While on Trips Of One or More Nights

A Profile Report

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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



Wilderness Activities While on Trips

Executive Summary

Over the last two years, only 1.8% (436,817) of adult Canadians participated in wilderness activities while on an out-of-town, overnight trip of one or more nights. Participation in wilderness activities was the 20th most common outdoor activity undertaken by Canadian Pleasure Travelers while traveling in the past two years. Taking a wilderness skills course (1.1%) was the most common activity, followed by dog sledding (0.7%) and ice climbing (0.2%). Wilderness skills courses (41.2%) and dog sledding (36.9%) were often reported as the main reason for taking at least one trip.

Those who participated in wilderness activities are more likely to be young (18 to 34 years of age) and single. In fact, they are the 3rd youngest of the 21 outdoor activity types and over-represented among Young Singles and Young Couples as well as Mature Singles. They are well-educated and the 5th most likely of the outdoor activity segments to have a university education (40.5%). However, perhaps reflecting their youth or lifestyle imperatives, their household incomes (\$73,987) ranked 19th out of the 21 outdoor activity types. They are highly over-represented in British Columbia.

Those who participated in wilderness activities are most likely to travel within their own province or region. They were the 4th most likely of the 21 outdoor activity types to have taken a trip within their own province or region (95.0%), but only the 18th most likely to have traveled to an adjacent province or region (38.7%) and the 8th most likely to have visited a nonadjacent province or region (53.6%). They were especially likely to have recently visited the Yukon and Northwest Territories. Those who participated in wilderness activities are less likely to take out-of-country, tropical trips. They were the 17th most likely to have visited the United States (53.5%) and the least likely of the 21 outdoor activity types to have visited Mexico (8.8%) and the Caribbean (11.5%).

Relative to the average Canadian Pleasure Traveler, those who participated in wilderness activities were exceptionally active when traveling. They were especially active in outdoor activities associated with wilderness settings (e.g., hiking, climbing & paddling; cross-country skiing & snowshoeing, hunting) and exhibit keen interest in culture and entertainment activities that are educational or experiential (e.g., aboriginal cultural experiences, wilderness tours). They seek vacations that are novel, physically challenging and intellectually stimulating as well as social and inexpensive.

Relative to the other 21 outdoor activity types, those who participated in wilderness activities are below-average users the Internet to plan (68.0%) and book travel (41.6%). They can be most effectively targeted effectively through outdoor, nature and science magazines, travel magazines and multicultural and jazz radio programming.

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 wilderness 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.

Wilderness Activities While on Trips

Market Incidence

Over the last two years, only 1.8% (436,817) of adult Canadians participated in wilderness activities while on an out-of-town, overnight trip of one or more nights. Participation in wilderness activities was the 20th most common outdoor activity undertaken by Canadian Pleasure Travelers while traveling in the past two years. 1.1% took a wilderness skills course while 0.7% went dog sledding and 0.2% went ice climbing.

41.2% of those who took a wilderness skills course and 36.9% of those who went dog sledding reported that this activity was the main reason for taking at least one trip in the past two years. Wildlife viewing was the outdoor activity cited eighth most often as the main reason for taking a trip. None of those who went ice climbing stated that this activity as a main reason for taking at least one trip.

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

	Number Who Participated In Wilderness Activities ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	436,817	166,041	18,439,508	24,776,103
Wilderness Activities (All Activities)	436,817	38.0%	2.4%	1.8%
Wilderness skills course	266,234	41.2%	1.4%	1.1%
Dog sledding	166,296	36.9%	0.9%	0.7%
Ice climbing	37,318	0.0%	0.2%	0.2%
Participated in all three wilderness activities	6,110	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 - Defined as individuals who participated in wilderness activity 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 wilderness activities are over-represented among Canadian Pleasure Travelers living in British Columbia. They are least likely to live in the Atlantic Provinces.

Fig. 2 Geographic Distribution of Those Who Participate in Wilderness Activities While on Trips

	Total Population	Estimated Number Who Participated in Wilderness Activities on a Trip	Percent of Pleasure Travelers in Region Who Participated in Wilderness Activities on a Trip	Percent of Total Regional Population Who Participated in Wilderness Activities on a Trip
Canada	24,776,103	436,817	2.4%	1.8%
Atlantic Provinces	1,822,494	15,707	1.2%	0.9%
Quebec	5,940,869	90,389	2.2%	1.5%
Ontario	9,671,592	175,763	2.5%	1.8%
Manitoba	843,107	11,594	1.9%	1.4%
Saskatchewan	706,325	10,131	1.9%	1.4%
Alberta	2,465,540	42,473	2.1%	1.7%
British Columbia	3,326,176	90,760	3.4%	2.7%

Demographic Profile

Those who participated in wilderness activities were the 3rd youngest of the 21 outdoor activity types and over-represented among Young Singles and Young Couples as well as Mature Singles. They are well-educated and the 5th most likely to have a university education (40.5%). However, perhaps reflecting their youth or lifestyle imperatives, their household incomes (\$73,987) ranked 19th out of the 21 outdoor activity types.

Fig. 3 Demographic Profile of Those Who Participated in Wilderness Activities
Relative to All Canadian Pleasure Travelers

Attribute	Size of Market	Participated in Wilderness Activities	Did Not Participate In Wilderness Activities ¹	Pleasure Travelers	Index ²
		436,817	18,002,691	18,439,508	100
Gender	Male	50.6%	48.8%	48.8%	104
	Female	49.4%	51.2%	51.2%	97
Age of Respondent	18 to 24	21.9%	12.6%	12.8%	171
	25 to 34	28.5%	19.1%	19.3%	148
	35 to 44	22.1%	20.5%	20.5%	107
	45 to 54	17.2%	20.4%	20.3%	84
	55 to 64	6.3%	14.3%	14.1%	45
	65 Plus	4.1%	13.1%	12.9%	32
Average Age		37.1	44.7	44.5	N/A
Marital Status	Not married	47.5%	31.8%	32.2%	148
	Married	52.5%	68.2%	67.8%	77
Parental Status	No children under 18	74.8%	71.0%	71.1%	105
	Children under 18	25.2%	29.0%	28.9%	87
Education	High school or less	28.9%	36.4%	36.2%	80
	Some post-secondary	13.2%	11.1%	11.2%	118
	Post-secondary diploma/certificate	17.4%	22.0%	21.9%	80
	University degree	40.5%	30.5%	30.7%	132
Household Income	Under \$20,000	6.6%	5.7%	5.7%	115
	\$20,000 to \$39,999	13.1%	14.5%	14.5%	90
	\$40,000 to \$59,999	14.1%	16.6%	16.5%	86
	\$60,000 to \$79,999	22.8%	15.1%	15.2%	149
	\$80,000 to \$99,999	8.1%	12.3%	12.2%	66
	\$100,000 or more	25.4%	22.8%	22.8%	111
	Not stated	10.0%	13.1%	13.0%	77
Average Household Income		\$73,987	\$72,800	\$72,829	N/A

- 1 - "No Wilderness Activities" 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 participate in wilderness activity on any trip. The numbers of Did Wilderness Activities and No Wilderness Activities equal the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Did Wilderness Activities in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Did Wilderness 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)

Those who participated in wilderness activities are most likely to travel within their own province or region. They were the 4th most likely of the 21 outdoor activity types to have taken a trip within their own province or region (95.0%), but the 18th most likely to have traveled to an adjacent province or region (38.7%) and the 8th most likely to have visited a nonadjacent province or region (53.6%). They were especially likely to have visited the Yukon and Northwest Territories in the past two years and to a lesser extent, the Western Provinces.

They are somewhat less likely to travel to the traditional tropical destinations and the least likely of the 21 outdoor activity types to have visited Mexico (8.8%) and the Caribbean (11.5%) in the last two years. They were the 17th most likely to have visited the United States (53.5%). However, this segment was the 5th most likely to have taken an overseas trip in the last two years.

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

	Participated in Wilderness Activities	Did Not Participate In Wilderness Activities	Pleasure Travelers	Index
Size of Market	436,817	18,002,691	18,439,508	100
Canada	97.1%	94.7%	94.8%	103
Took a trip within own province / region	95.0%	85.6%	85.9%	111
Took a trip to an adjacent province / region	53.6%	48.4%	48.6%	110
Took a trip to non-adjacent province / region	38.7%	31.3%	31.4%	123
Newfoundland and Labrador	3.6%	4.3%	4.3%	83
Prince Edward Island	7.6%	7.2%	7.2%	106
New Brunswick	11.4%	11.8%	11.8%	97
Nova Scotia	15.5%	12.6%	12.7%	122
Quebec	42.5%	38.8%	38.9%	109
Ontario	57.8%	53.4%	53.5%	108
Manitoba	14.0%	9.0%	9.2%	153
Saskatchewan	14.9%	11.3%	11.4%	131
Alberta	33.6%	25.7%	25.8%	130
British Columbia	41.1%	30.4%	30.6%	134
Yukon	7.1%	0.9%	1.0%	706
Northwest Territories	2.9%	0.6%	0.7%	432
Nunavut	0.3%	0.3%	0.3%	116
United States	53.5%	50.6%	50.7%	105
Mexico	8.8%	12.5%	12.4%	71
Caribbean	11.6%	15.7%	15.6%	74
All other destinations	31.7%	23.5%	23.6%	134

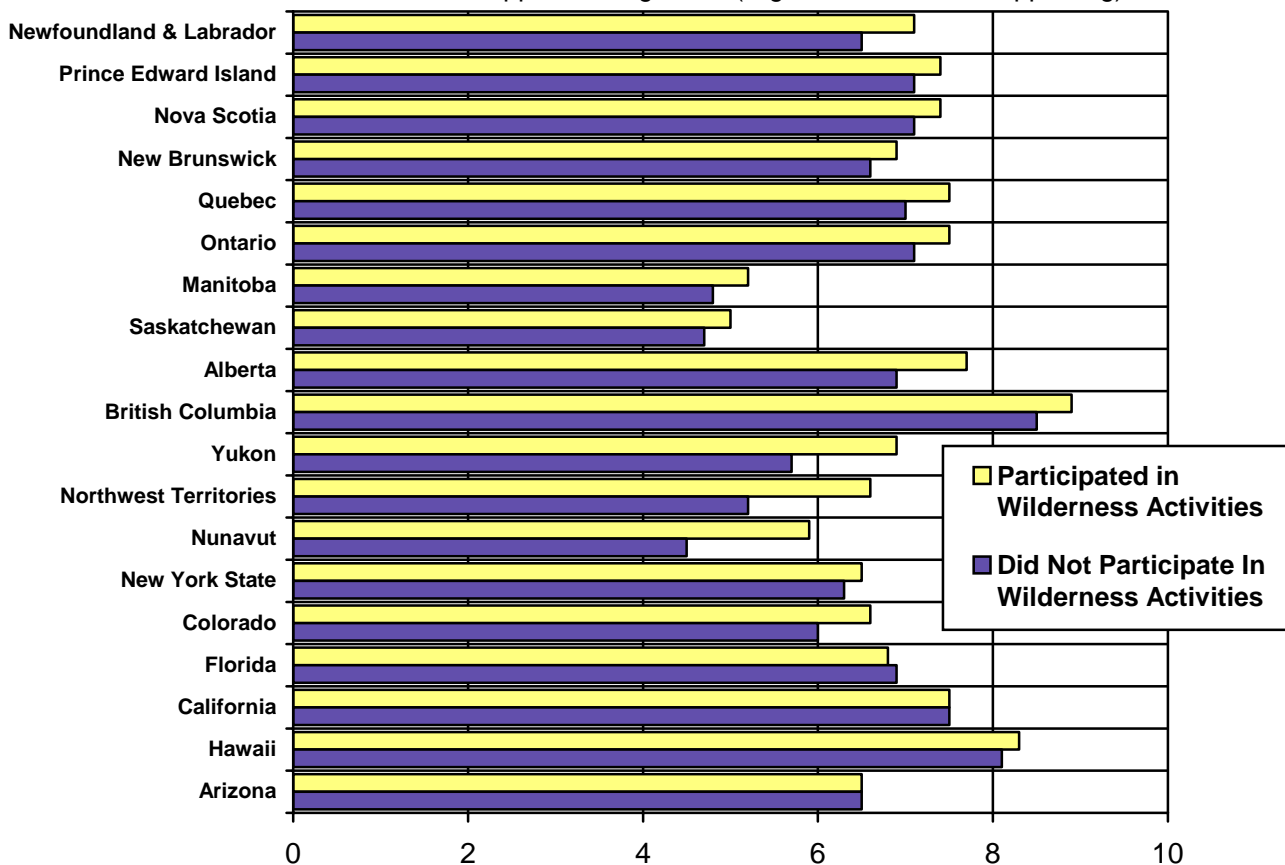
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Those who participated in wilderness activities while on trips have very favourable impressions of Canadian destinations and tended to give them higher appeal rating than other Canadian Pleasure Travelers, and especially the Yukon and the Northwest Territories. British Columbia was considered the most appealing Canadian destination.

Their appeal ratings of the U.S. reference states were comparable to those of other Canadian Pleasure Travelers with the exception of Colorado which was perceived more favourably.

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 wilderness activities were extremely active in outdoor activities while on trips relative to other Canadian Pleasure Travelers. They frequently went wildlife viewing, hiking, climbing and paddling and boating and swimming (e.g., motorboating, swimming in lake) while on trips. They were especially active in activities associated with wilderness settings, including fishing, cross-country skiing and snowshoeing, snowmobiling and ATVing, hunting, and horseback riding. Moreover, this segment was exceptionally active in physically strenuous outdoor pursuits including sports (e.g., sports & games, team sports), downhill skiing and snowboarding, skating, exercising and jogging, cycling, sailing and surfing, freshwater scuba diving and snorkeling and extreme air sports.

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

	Participated in Wilderness Activities	Did Not Participate In Wilderness Activities	Pleasure Travelers	Index
Size of Market	436,817	18,002,691	18,439,508	100
Wildlife Viewing	78.0%	40.4%	41.2%	189
Hiking, Climbing & Paddling	72.3%	33.1%	34.1%	212
Ocean Activities (e.g., swimming in ocean, sunbathing)	68.0%	48.1%	48.5%	140
Boating & Swimming (e.g., motorboating, swimming in lakes)	66.6%	40.5%	41.1%	162
Sports & Games (e.g., tennis, board games)	45.5%	22.2%	22.7%	201
Fishing	42.3%	23.1%	23.6%	179
Cross-country Skiing & Snowshoeing	41.0%	8.5%	9.3%	441
Downhill Skiing & Snowboarding	37.9%	14.1%	14.6%	259
Skating (e.g., ice skating, rollerblading)	36.6%	11.4%	12.0%	306
Exercising & Jogging	36.0%	15.4%	15.9%	227
Cycling	33.2%	13.1%	13.5%	245
Snowmobiling & ATVing	26.5%	11.0%	11.3%	234
Team Sports (e.g., hockey, baseball)	25.1%	11.0%	11.4%	221
Golfing	19.4%	18.3%	18.3%	106
Hunting	17.3%	4.4%	4.7%	366
Horseback Riding	13.8%	4.7%	4.9%	282
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	13.6%	6.1%	6.3%	217
Freshwater Scuba & Snorkeling	12.2%	2.8%	3.0%	404
Extreme Air Sports (e.g., parachuting)	7.5%	1.0%	1.1%	664
Motorcycling	3.7%	3.0%	3.0%	122

Outdoor Activities Pursued in a Typical Year

Those who participated in wilderness activities while on trips continue to exhibit a strong preference for wilderness and nature-related activities while not traveling. They frequently went canoeing and kayaking, hiking, swimming and on day outings to parks while not traveling. Relative to the typical Canadian Pleasure Traveler, they were also much more likely to go horseback riding, hunting, cross-country skiing, downhill skiing, snowboarding, ice-skating, snowmobiling and sailing and boating. Those who participated in wilderness activities are also more likely to play racquet sports and team sports and go jogging and rollerblading while not traveling. On the other hand, they are less likely than average to play golf.

Fig. 7 Outdoor Activities Pursued in a Typical Year

	Participated in Wilderness Activities	Did Not Participate In Wilderness Activities	Pleasure Travelers	Index
Size of Market	436,817	18,002,691	18,439,508	100
Day outing to a park	79.5%	66.6%	66.9%	119
Hiking	77.7%	48.1%	48.8%	159
Swimming	70.8%	60.0%	60.3%	117
Exercising at home or at a fitness club	67.5%	60.8%	61.0%	111
Picnicking	64.8%	52.8%	53.1%	122
Camping	62.7%	38.0%	38.6%	162
Gardening	62.2%	59.7%	59.8%	104
Cycling	57.9%	44.0%	44.3%	131
Canoeing or kayaking	51.4%	16.1%	16.9%	304
Ice-skating	49.9%	28.0%	28.5%	175
Jogging	42.7%	23.6%	24.1%	178
Sailing or other boating	37.5%	23.1%	23.4%	160
Fishing	37.4%	29.1%	29.3%	128
Playing racquet sports (e.g., tennis or badminton)	36.6%	18.7%	19.1%	191
Playing team sports	31.5%	22.7%	22.9%	137
Cross-country skiing	29.4%	12.0%	12.5%	236
Rollerblading	29.0%	14.0%	14.4%	202
Downhill skiing	26.6%	15.9%	16.2%	164
Golfing	24.9%	29.5%	29.4%	85
Riding an all-terrain vehicle (ATV)	22.3%	14.1%	14.3%	156
Hunting	18.2%	7.5%	7.7%	235
Snowmobiling	18.0%	9.6%	9.8%	184
Horseback riding	17.0%	6.6%	6.8%	250
Snowboarding	14.3%	4.8%	5.0%	284
Skateboarding	2.1%	1.6%	1.6%	135

Culture and Entertainment Activities Pursued While on Trips

Those who participated in wilderness activities while on trips are also highly active in a wide range of culture and entertainment activities while on trips. Most visited historical sites, museums and art galleries, theme parks & exhibits and science & technology exhibits and attended musical concerts, festivals and attractions while on trips. Relative to other Canadian Pleasure Travelers, they exhibit particular interest in learning educational or experiential activities (e.g., aboriginal cultural experiences, participatory historical activities, literary and film festivals, agro-tourism, wine, beer and food tastings). They also patronize live art performances (e.g., high art performances, comedy festivals and clubs) and sporting events (e.g., professional sporting events, amateur tournaments, national & international sporting events) while on trips.

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

	Participated in Wilderness Activities	Did Not Participate In Wilderness Activities	Pleasure Travelers	Index
Size of Market	436,817	18,002,691	18,439,508	100
Shopping & Dining	91.7%	82.7%	82.9%	111
Historical Sites, Museums & Art Galleries	85.9%	57.6%	58.3%	147
Theme Parks & Exhibits	68.9%	38.4%	39.2%	176
Fairs & Festivals	67.5%	37.0%	37.7%	179
Musical Concerts, Festivals & Attractions	59.7%	32.1%	32.7%	182
Science & Technology Exhibits	53.6%	22.4%	23.1%	232
Wine, Beer & Food Tastings	47.8%	23.2%	23.8%	201
Agro-Tourism	38.9%	15.1%	15.7%	248
Garden Theme Attractions	38.8%	17.1%	17.6%	220
Professional Sporting Events	38.2%	15.1%	15.7%	244
Live Theatre	37.0%	20.7%	21.1%	175
Casinos	35.4%	25.7%	25.9%	137
Aboriginal Cultural Experiences	34.0%	11.1%	11.6%	293
Participatory Historical Activities	26.9%	6.2%	6.7%	402
Amateur Tournaments	25.5%	11.5%	11.8%	216
Comedy Festivals & Clubs	24.1%	9.8%	10.1%	238
Spas	22.6%	9.7%	10.0%	225
High Art Performances	21.3%	10.7%	11.0%	194
Equestrian & Western Events	13.5%	6.5%	6.7%	203
Literary & Film Festivals	9.7%	2.4%	2.6%	376
National & International Sporting Events	8.5%	3.1%	3.2%	265

Culture and Entertainment Activities Pursued in a Typical Year

While not traveling, those who participated in wilderness activities were also quite active in local culture and entertainment pursuits. The majority dine in local restaurants, visit local festivals and fairs and visit local historic sites or heritage buildings. They are especially more likely than others to attend local live rock and jazz performances (e.g., bars with live pop or rock bands, rock music concerts, jazz clubs) and local live art performances (e.g., classical music concerts, opera, ballet). On the other hand, they are less likely to go gambling at a local casino.

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

	Participated in Wilderness Activities	Did Not Participate In Wilderness Activities	Pleasure Travelers	Index
Size of Market	436,817	18,002,691	18,439,508	100
Going out to eat in restaurants	93.1%	91.5%	91.5%	102
Going to festivals or fairs	71.0%	61.2%	61.4%	116
Going to historic sites or heritage buildings	51.9%	39.0%	39.3%	132
Going to pick-your-own farms or farmers' market	49.6%	40.8%	41.0%	121
Going to bars with live pop or rock bands	47.9%	27.2%	27.7%	173
Going to museums	46.2%	32.4%	32.7%	141
Going to amateur sporting events	43.9%	41.9%	42.0%	104
Going dancing	40.9%	29.6%	29.9%	137
Going to professional sporting events	38.4%	31.9%	32.1%	120
Going to rock music concerts	37.7%	22.1%	22.4%	168
Going to art galleries or art shows	37.2%	31.6%	31.8%	117
Going to amusement or theme parks	36.7%	28.7%	28.9%	127
Going to live theatre	36.4%	34.7%	34.8%	105
Going to zoos or aquariums	34.6%	30.3%	30.4%	114
Going to botanical gardens	32.3%	25.2%	25.4%	127
Going to classical music concerts	28.9%	16.2%	16.5%	175
Going to day spas	21.0%	13.6%	13.8%	153
Going to jazz clubs	14.9%	7.3%	7.5%	198
Going to the opera	14.1%	6.4%	6.6%	214
Staying overnight in a hotel or B&B in own city	13.7%	9.8%	9.9%	138
Going to the ballet	13.6%	7.1%	7.3%	187
Going to gamble in casinos	12.8%	18.2%	18.1%	71
Going to rodeos	12.2%	7.2%	7.3%	166

Accommodation Stayed In While on a Trip

The majority of those who participated in wilderness activities while on trips stayed at a public campground in a national, provincial, state or municipal park in the past two years. They were also likely to have stayed at a lakeside or riverside resort. Relative to the average Canadian Pleasure Traveler, those who participated in wilderness activities were over four times more likely to have stayed in a wilderness setting (e.g., wilderness campsite, lodge accessible by car, fly-in or remote lodge or outpost). They were also more than twice as likely as others to have stayed at a ski or mountain resort, health spa, farm or guest ranch, a houseboat and a cooking school.

Fig. 10 Accommodation Stayed in While on Trips

	Participated in Wilderness Activities	Did Not Participate In Wilderness Activities	Pleasure Travelers	Index
Size of Market	436,817	18,002,691	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	53.8%	25.7%	26.4%	204
Lakeside / Riverside Resort	44.0%	21.8%	22.3%	197
A Camp Site in a Wilderness Setting (Not a Campground)	39.1%	7.8%	8.6%	456
A Private Campground	30.9%	18.5%	18.8%	164
Ski Resort or Mountain Resort	30.5%	13.5%	13.9%	219
Seaside Resort	28.4%	20.5%	20.7%	137
Wilderness Lodge You Can Drive to by Car	26.2%	5.1%	5.6%	466
Health Spa	13.5%	5.7%	5.9%	228
Farm or Guest Ranch	11.8%	2.8%	3.0%	388
Remote or Fly-In Wilderness Lodge	8.0%	1.4%	1.6%	502
Country Inn or Resort with Gourmet Restaurant	7.1%	5.0%	5.1%	140
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	5.3%	4.5%	4.5%	119
Remote or Fly-In Wilderness Outpost	4.6%	0.5%	0.6%	808
On a Houseboat	4.1%	1.3%	1.4%	298
Cooking School	0.8%	0.3%	0.4%	226
Wine Tasting School	0.2%	0.3%	0.3%	67

Tours and Cruises Taken During Past Two Years

Those who participated in wilderness activities while on trips frequently took tours and freshwater cruises in the past two years. They most often took self-guided sameday tours and scenic countryside drives. However, in relative terms, they were especially likely to have taken wilderness tours, tours of wineries or factories, air tours in an airplane or helicopter and organized single-location and multiple-location overnight tours. They were also much more likely than the average Canadian Pleasure Traveler to have taken freshwater lake and river cruises (e.g., St. Lawrence River, Great Lakes). On the other hand, they were less likely to have gone on a Caribbean or Alaskan ocean cruise in the past two years.

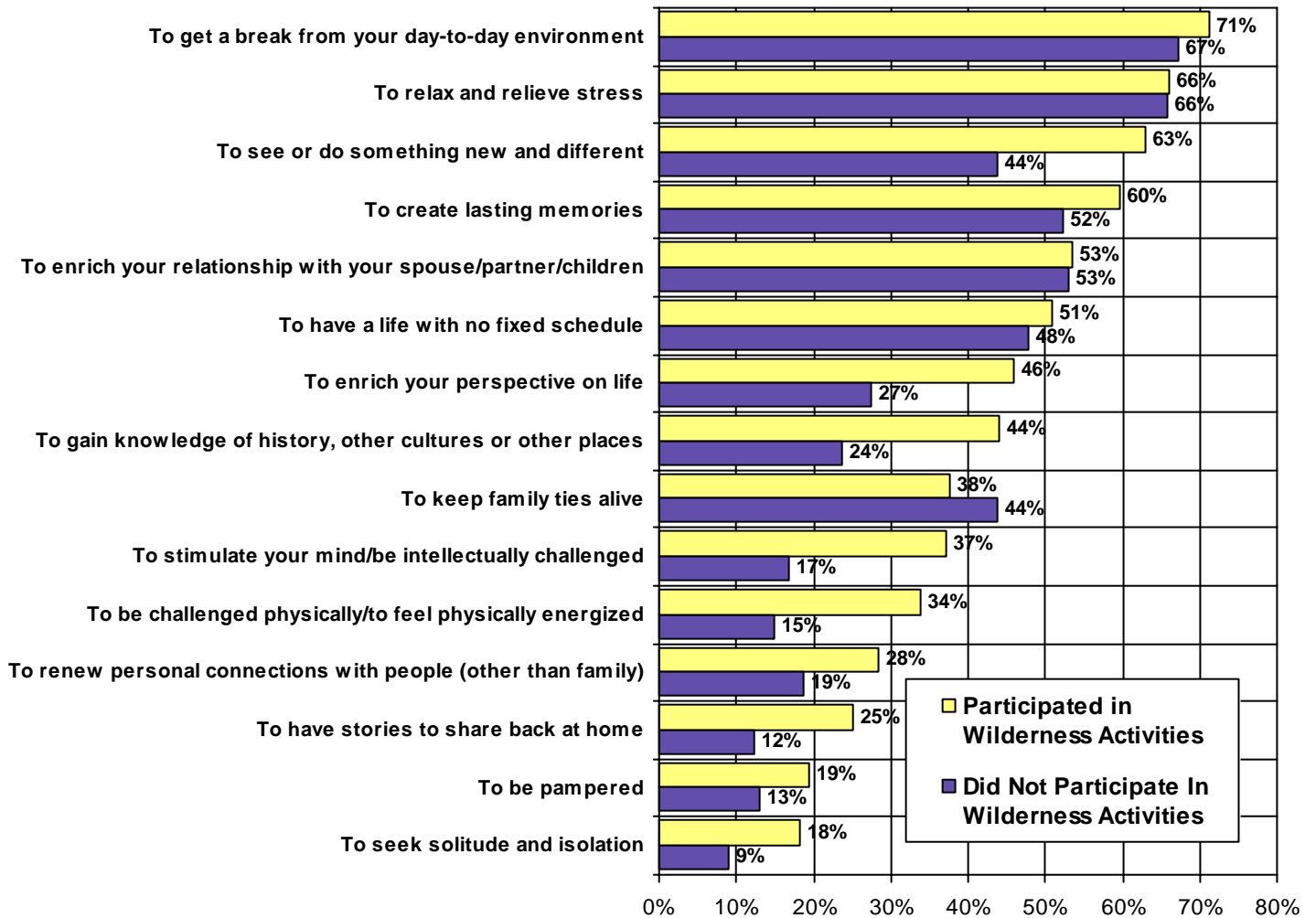
Fig. 11 Tours and Cruises Taken During Past Two Years

	Participated in Wilderness Activities	Did Not Participate In Wilderness Activities	Pleasure Travelers	Index
Size of Market	436,817	18,002,691	18,439,508	100
A self-guided, sameday tour on overnight trip	48.0%	28.8%	29.3%	164
Around the countryside - scenic drives	42.5%	22.0%	22.4%	189
Wilderness tour	39.3%	12.4%	13.0%	302
Around the city	38.3%	23.0%	23.4%	164
An organized, sameday, guided tour while on an overnight trip	36.2%	21.9%	22.2%	163
A self-guided, overnight tour where you stayed in different locations	32.4%	17.8%	18.1%	179
On the water (sightseeing cruise)	24.3%	12.8%	13.1%	186
An organized, overnight, guided tour where you stayed in different locations	23.3%	9.7%	10.1%	231
An organized, overnight, guided tour where you stayed in a single location	18.0%	7.6%	7.8%	230
Some other type of tour	16.6%	9.7%	9.8%	168
To a winery	13.7%	5.5%	5.6%	243
To a factory	9.3%	2.5%	2.6%	351
To a casino	8.0%	6.5%	6.5%	122
In the air as a pilot or passenger of an airplane or helicopter	6.4%	1.8%	1.9%	337
Cruise on the St. Lawrence River	6.1%	1.8%	1.9%	315
Cruise on another lake or river	5.5%	2.3%	2.4%	233
Ocean cruise – Other	3.7%	3.3%	3.3%	112
Some other type of cruise	3.4%	1.6%	1.6%	211
Caribbean ocean cruise	2.7%	5.5%	5.4%	49
Great Lakes cruise	2.1%	0.8%	0.8%	263
Alaskan ocean cruise	1.6%	1.6%	1.6%	98
Submarine cruise	0.1%	0.1%	0.1%	75

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travelers, those who participated in wilderness activities take vacations to get a break from their day-to-day environment, to relax and relieve stress, to see or do something new and different, to create lasting memories, to enrich family relationships and to live without a fixed schedule. However, for this activity type it is especially important that a vacation offers an opportunity to do or see something new or different. They also prefer vacations that are intellectually stimulating (e.g., enrich their perspective on life, gain knowledge), physical challenging, allow them to renew personal connections with friends and offer solitude and isolation.

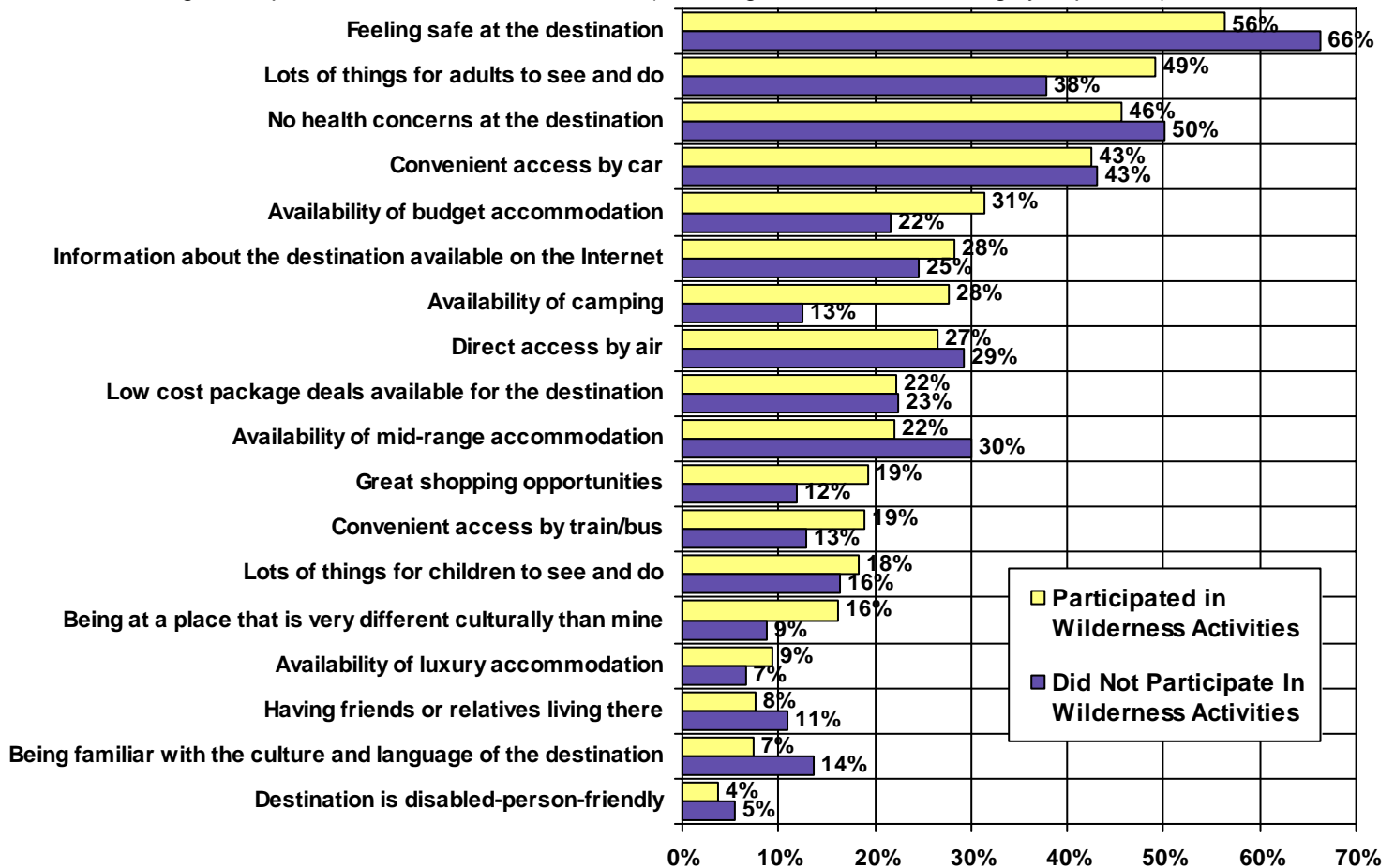
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, those who participated in wilderness activities consider it important that they feel safe at a destination, although to a lesser extent than other Canadian Pleasure Travelers. They also look for destinations that are culturally distinctive, offer lots of things for adults to see and do, have budget accommodation or camping, offer great shopping opportunities and are conveniently accessible by way of trains or buses.

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 participate in wilderness activities while on trips tend to start planning summer trips with a particular destination in mind. However, they are more likely than others to begin planning a vacation, and especially winter vacations, by considering the specific activities that they want to do while on the trip. This outdoor activity type is also likely to be more responsive to discount travel packages for summer travel.

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

	Participated in Wilderness Activities	Did Not Participate In Wilderness Activities	Pleasure Travelers	Index
Size of Market	436,817	18,002,691	18,439,508	100
Summer				
Started with a desired destination in mind	49.8%	48.4%	48.5%	103
Started by considering specific activities wanted to do	16.1%	13.7%	13.8%	116
Started with a certain type of vacation experience in mind	23.7%	23.7%	23.7%	100
Looked for packaged deals - no destination in mind	3.6%	1.3%	1.3%	274
Considered something else first	2.4%	4.3%	4.3%	55
Don't know / Other	4.5%	8.5%	8.4%	53
Winter				
Started with a desired destination in mind	40.9%	48.8%	48.6%	84
Started by considering specific activities wanted to do	28.1%	15.2%	15.6%	180
Started with a certain type of vacation experience in mind	18.8%	19.3%	19.3%	97
Looked for packaged deals - no destination in mind	2.2%	3.2%	3.2%	70
Considered something else first	1.9%	4.7%	4.7%	41
Don't know / Other	8.1%	8.7%	8.6%	94

Trip Planning and Information Sources Consulted

The majority of those who participated in wilderness activities while on trips were responsible for planning their trips either on their own (49.6%) or with someone else (13.2%). Relative to the average Canadian Pleasure Traveler, this segment is more likely to be solely responsible for planning their own trips.

When making vacation plans, this segment tends to consult a wider variety of information sources than the average Canadian Pleasure Traveler. The majority use the Internet, word-of-mouth and past experiences to plan travel. However, they are much more likely than the typical Canadian Pleasure Traveler to obtain travel information from television programs and television advertising, direct mail and electronic newsletters, travel guidebooks such as Fodor's and trade, travel or sports shows.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Participated in Wilderness Activities	Did Not Participate In Wilderness Activities	Pleasure Travelers	Index
Size of Market		436,817	18,002,691	18,439,508	100
Who Plans Trips?	Respondent plans trips	49.6%	41.9%	42.0%	118
	Trip planning a shared responsibility	13.2%	16.5%	16.4%	80
	Someone else plans trips	37.3%	41.6%	41.5%	90
Information Sources Consulted	An Internet website	74.2%	65.0%	65.2%	114
	Advice of others / Word-of-mouth	66.8%	50.7%	51.1%	131
	Past experience / Been there before	64.2%	50.1%	50.4%	127
	Maps	49.3%	32.1%	32.6%	151
	Official travel guides or brochures from state / province	44.5%	25.5%	26.0%	171
	A travel agent	40.1%	34.0%	34.1%	118
	Visitor information centres	38.1%	23.0%	23.4%	163
	Articles in newspapers / magazines	36.1%	20.5%	20.9%	173
	Travel guide books such as Fodor's	30.0%	13.2%	13.6%	220
	Advertisements in newspapers / magazines	24.5%	14.0%	14.3%	172
	Programs on television	24.3%	7.1%	7.5%	323
	An auto club such as CAA	23.7%	17.5%	17.7%	134
	Travel information received in the mail	20.1%	8.6%	8.8%	227
	Advertisements on television	10.5%	4.9%	5.0%	211
	Visits to trade, travel or sports shows	8.3%	3.0%	3.1%	268
An electronic newsletter or magazine received by e-mail	8.1%	4.1%	4.2%	194	

Use of the Internet to Plan and Arrange Trips

Relative to other outdoor activity types, those who participated in wilderness activities are below-average users of the Internet to plan (68.0%) and book (41.6%) travel. In fact, this outdoor activity type was the 15th most likely of the 21 outdoor activity types to plan travel using the Internet and the 16th most likely to have booked travel online. The majority use hotel or resort websites and the tourism websites of specific countries, regions or cities. They are most likely to purchase accommodation and airline tickets. However, relative to other Canadian Pleasure Travelers, those who participated in wilderness activities are much more likely than others to have purchased tickets for specific attractions and fairs for travel by rail, bus and boat or ship over the Internet.

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

		Participated in Wilderness Activities	Did Not Participate In Wilderness Activities	Pleasure Travelers	Index
	Size of Market	436,817	18,002,691	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	32.0%	41.1%	40.8%	78
	Uses Internet to plan trips only	26.4%	22.0%	22.1%	120
	Uses Internet to book part of trip	41.6%	36.9%	37.0%	112
Types of Websites Consulted	A website of a hotel or resort	69.7%	56.6%	57.0%	122
	A tourism website of a country / region / city	58.1%	49.6%	49.8%	117
	An airline website	48.3%	46.3%	46.3%	104
	A travel planning / booking website	45.2%	45.7%	45.7%	99
	A website of an attraction	43.5%	34.2%	34.5%	126
	Some other website	40.2%	27.2%	27.6%	146
	A cruise line website	7.9%	8.1%	8.1%	98
	A motorcoach website	4.2%	2.4%	2.5%	172
Parts of Trips Booked Over The Internet	Accommodation	80.5%	68.8%	69.2%	116
	Air tickets	72.4%	69.4%	69.5%	104
	Tickets or fees for specific activities or attractions	35.8%	23.3%	23.6%	151
	Car rental	32.9%	27.0%	27.1%	121
	Tickets for rail, bus or boat / ship fares	27.6%	15.0%	15.3%	180
	A package containing two or more items	20.4%	15.3%	15.4%	133
	Other	6.7%	3.9%	3.9%	172

Media Consumption Habits

Those who participated in wilderness activities while on trips are above-average users of travel-related media, including the travel sections of newspapers, travel magazines, travel websites, and travel shows on television. However they may be best reached through travel magazines. This outdoor activity type may also be effectively targeted through outdoor activity, nature and science magazines and multicultural and jazz radio programming.

Fig. 17 Media Consumption Habits

		Participated in Wilderness Activities	Did Not Participate In Wilderness Activities	Pleasure Travelers	Index
	Size of Market	436,817	18,002,691	18,439,508	100
Newspaper Readership	Reads daily newspaper	89.8%	87.2%	87.3%	103
	Reads weekend edition of newspaper	90.2%	87.2%	87.3%	103
	Reads local neighbourhood or community newspapers	68.6%	61.4%	61.5%	111
	Reads other types of newspapers	26.1%	16.9%	17.2%	152
	Frequently or occasionally reads travel section of daily newspaper	51.6%	45.6%	45.7%	113
	Frequently or occasionally reads travel section of weekend newspaper	54.8%	47.2%	47.3%	116
Types of Magazines Read (Top 5 Indexed)	Outdoor activities / sports	36.5%	12.3%	12.8%	285
	Science and geography	38.4%	16.1%	16.6%	231
	Travel (e.g., Condé Nast)	22.4%	11.5%	11.8%	191
	Computers, electronics and technology	18.1%	10.2%	10.4%	174
	Business, finance and investing	25.5%	16.1%	16.3%	156
Type of Television Programs Watched (Top 5 Indexed)	Science & nature shows	56.2%	43.5%	43.8%	128
	Music / Music video shows / channels	31.3%	25.3%	25.5%	123
	Science fiction / Fantasy shows	22.0%	19.1%	19.2%	114
	Travel shows	33.1%	30.2%	30.3%	109
	Other television shows	29.5%	28.7%	28.8%	103
Type of Radio Programs Listened To (Top 5 Indexed)	Multicultural	16.8%	8.2%	8.4%	201
	Jazz / Big band	16.7%	8.6%	8.8%	190
	Classical music	25.6%	17.0%	17.2%	148
	Top 40 / Current hits	32.8%	25.0%	25.2%	130
	Some other radio program	20.1%	15.5%	15.6%	129
Types of Websites Visited (Top 5 Indexed)	Sites for specific activities or interests	49.2%	35.5%	35.9%	137
	Magazine sites	21.8%	16.4%	16.6%	132
	Network news sites (e.g., CBC, CNN)	46.0%	35.9%	36.1%	127
	Travel	60.6%	50.3%	50.6%	120
	Sports	29.8%	26.8%	26.9%	111

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
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	

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