

CANADIAN TRAVEL MARKET

Wildlife Viewing While on Trips Of One or More Nights

A Profile Report

October 16, 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
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Wildlife Viewing While on Trips

Executive Summary

Over the last two years, 30.7% (7,605,527) of adult Canadians went wildlife viewing while on an out-of-town, overnight trip of one or more nights. Wildlife viewing was the second most common outdoor activity undertaken by Canadian Pleasure Travelers. Visiting a nature park (22.8%) was the most popular activity, followed by viewing land-based animals (10.4%), whales and other marine life (8.4%), wildflowers and flora (7.7%), birds (7.5%), and the Northern Lights (4.4%). Of those who went wildlife viewing, 35.3% (2,681,779) reported that this activity was the main reason for taking at least one trip. Wildlife viewing was the outdoor activity cited eighth most often as the main reason for taking a trip.

Relative to the average Canadian Pleasure Traveler, Wildlife Viewers are slightly more likely to be female (52.9%), 25 to 54 years of age and married with dependent children living at home. They are more likely to have a university education and their household income is close to the average Canadian Pleasure Traveler (\$74,554). They are over-represented in the Western Provinces and especially in Alberta.

Wildlife Viewers frequently travel within Canada (97.9%) and were more likely than the average Canadian Pleasure Traveler to have taken trips to other provinces or regions in the past two years. They were especially more likely than average to have visited the western provinces, the northern territories and Prince Edward Island.

Wildlife Viewers were more likely to have participated in outdoor activities when on trips than the typical Canadian Pleasure Traveler and especially in nature-oriented activities (e.g., hiking, climbing & paddling; cycling; cross-country skiing & snowshoeing, wilderness activities). They were also more likely to have camped, stayed in the wilderness and to have taken wilderness tours in the last two years. Wildlife Viewers were also very active in culture and entertainment activities when traveling, and were particularly likely to have patronized educational attractions (e.g., historical sites, museums & galleries; science & technology exhibits; aboriginal cultural experiences). Relative to other Canadian Pleasure Travelers, Wildlife Viewers seek vacations that are intellectually stimulating, novel and memorable.

Wildlife Viewers were more likely than average to use the Internet to plan (69.2%) and book travel (44.9%). They are particularly likely to use official tourism information sources (e.g., brochures & guides, visitor information centres, websites) to plan trips. They can be most effectively targeted effectively through travel, nature and home-related media.

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 went wildlife viewing 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.

Wildlife Viewing While on Trips

Market Incidence

Over the last two years, one-third of adult Canadians (30.7%, or 7,605,527) went wildlife viewing while on an out-of-town, overnight trip of one or more nights. Wildlife viewing was the second most common outdoor activity undertaken by Canadian Pleasure Travelers. Visiting a nature park (22.8%) was the most popular wildlife viewing activity. Viewing land-based animals (10.4%) was next most popular, followed by watching whales and other marine life (8.4%), viewing wildflowers and flora (7.7%), birdwatching (7.5%) and viewing Northern Lights (4.4%). 0.4% of adult Canadians (97,597) participated in all six wildlife viewing activities while on trips during the past two years.

Of those who went wildlife viewing, 35.3% (2,681,779) 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. Those who visited a nature park (37.9%) were more likely than other Wildlife Viewers to report that this activity was the main reason for taking at least one trip over the last two years.

Fig. 1 Incidence of Wildlife Viewing While on Trips¹

	Number of Wildlife Viewers ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	7,605,527	2,681,779	18,439,508	24,776,103
Wildlife Viewing (All Activities)	7,605,527	35.3%	41.2%	30.7%
Visiting nature park (national, provincial/state)	5,641,104	37.9%	30.6%	22.8%
Viewing land-based animals	2,568,271	17.8%	13.9%	10.4%
Whale watching & other marine life	2,089,761	23.9%	11.3%	8.4%
Viewing wildflowers/flora	1,918,587	14.3%	10.4%	7.7%
Birdwatching	1,852,950	16.6%	10.0%	7.5%
Viewing northern lights	1,085,075	10.3%	5.9%	4.4%
Participated in all six wildlife viewing activities	97,597	6.4%	0.5%	0.4%

- 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 - "Wildlife Viewers" are defined as individuals who went wildlife viewing 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

Wildlife Viewers are well-represented in all regions of the country. However, they are more likely to live in Western Canada (i.e., British Columbia, Alberta, Saskatchewan and Manitoba) than in Central Canada (i.e., Ontario, Quebec) or the Atlantic Provinces.

Fig. 2 Geographic Distribution of Those Who Went Wildlife Viewing While on Trips

	Total Population	Estimated Number Who Went Wildlife Viewing on a Trip	Percent of Pleasure Travelers in Region Who Went Wildlife Viewing on a Trip	Percent of Total Regional Population Who Went Wildlife Viewing on a Trip
Canada	24,776,103	7,605,527	41.2%	30.7%
Atlantic Provinces	1,822,494	488,618	38.5%	26.8%
Quebec	5,940,869	1,636,014	39.0%	27.5%
Ontario	9,671,592	2,749,560	38.4%	28.4%
Manitoba	843,107	256,492	43.1%	30.4%
Saskatchewan	706,325	245,973	45.4%	34.8%
Alberta	2,465,540	1,000,914	49.9%	40.6%
British Columbia	3,326,176	1,227,956	46.1%	36.9%

Demographic Profile

Relative to the average Canadian Pleasure Traveler, Wildlife Viewers are slightly more likely to be female, 25 to 54 years of age and married with dependent children (less than 18 years of age) living at home. They are more likely to have a university education than the average Canadian Pleasure Traveler. Their household income is only slightly above-average relative to the average Canadian Pleasure Traveler.

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

		Wildlife Viewers	Non-Wildlife Viewers ¹	Pleasure Travelers	Index ²
Attribute	Size of Market	7,605,527	10,833,982	18,439,508	100
Gender	Male	47.1%	50.1%	48.8%	96
	Female	52.9%	49.9%	51.2%	103
Age of Respondent	18 to 24	12.0%	13.3%	12.8%	94
	25 to 34	22.2%	17.2%	19.3%	115
	35 to 44	21.6%	19.8%	20.5%	105
	45 to 54	21.1%	19.8%	20.3%	104
	55 to 64	13.4%	14.6%	14.1%	95
	65 Plus	9.6%	15.2%	12.9%	75
Average Age		43.2	45.5	44.5	N/A
Marital Status	Not married	30.4%	33.5%	32.2%	94
	Married	69.6%	66.5%	67.8%	103
Parental Status	No children under 18	68.9%	72.7%	71.1%	97
	Children under 18	31.1%	27.3%	28.9%	108
Education	High school or less	30.3%	40.4%	36.2%	84
	Some post-secondary	11.5%	10.9%	11.2%	103
	Post-secondary diploma/certificate	22.3%	21.6%	21.9%	102
	University degree	35.9%	27.0%	30.7%	117
Household Income	Under \$20,000	5.0%	6.2%	5.7%	88
	\$20,000 to \$39,999	13.6%	15.1%	14.5%	94
	\$40,000 to \$59,999	17.0%	16.2%	16.5%	103
	\$60,000 to \$79,999	16.1%	14.6%	15.2%	106
	\$80,000 to \$99,999	11.9%	12.4%	12.2%	98
	\$100,000 or more	24.5%	21.7%	22.8%	107
	Not stated	11.9%	13.7%	13.0%	92
Average Household Income		\$74,554	\$71,593	\$72,829	N/A

1 - "Non-Wildlife Viewers" 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 wildlife viewing on any trip. The numbers of Wildlife Viewers and Non-Wildlife Viewers equal the number of Pleasure Travelers.

2 - The "Index" is calculated by dividing the percent for Wildlife Viewers in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Wildlife Viewers 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)

Wildlife Viewers frequently travel within Canada (97.9%) and were more likely than the average Canadian Pleasure Traveler to have taken trips to adjacent provinces / regions (56.5%) and non-adjacent provinces / regions (37.4%) in the past two years. Ontario (56.6%), Quebec (41.4%), British Columbia (37.8%) and Alberta (33.6%) were the most common destinations. However, in relative terms, Wildlife Viewers were especially over-represented among visitors to the western provinces and the northern territories.

Wildlife Viewers were the fourth least likely of the 21 outdoor activity types to have taken a trip to the United States (52.7%). Their travel activity to Mexico and the Caribbean is also below that of most other outdoor activity types (although they were slightly more likely to have visited Mexico or overseas destinations than the typical Canadian Pleasure Traveler).

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

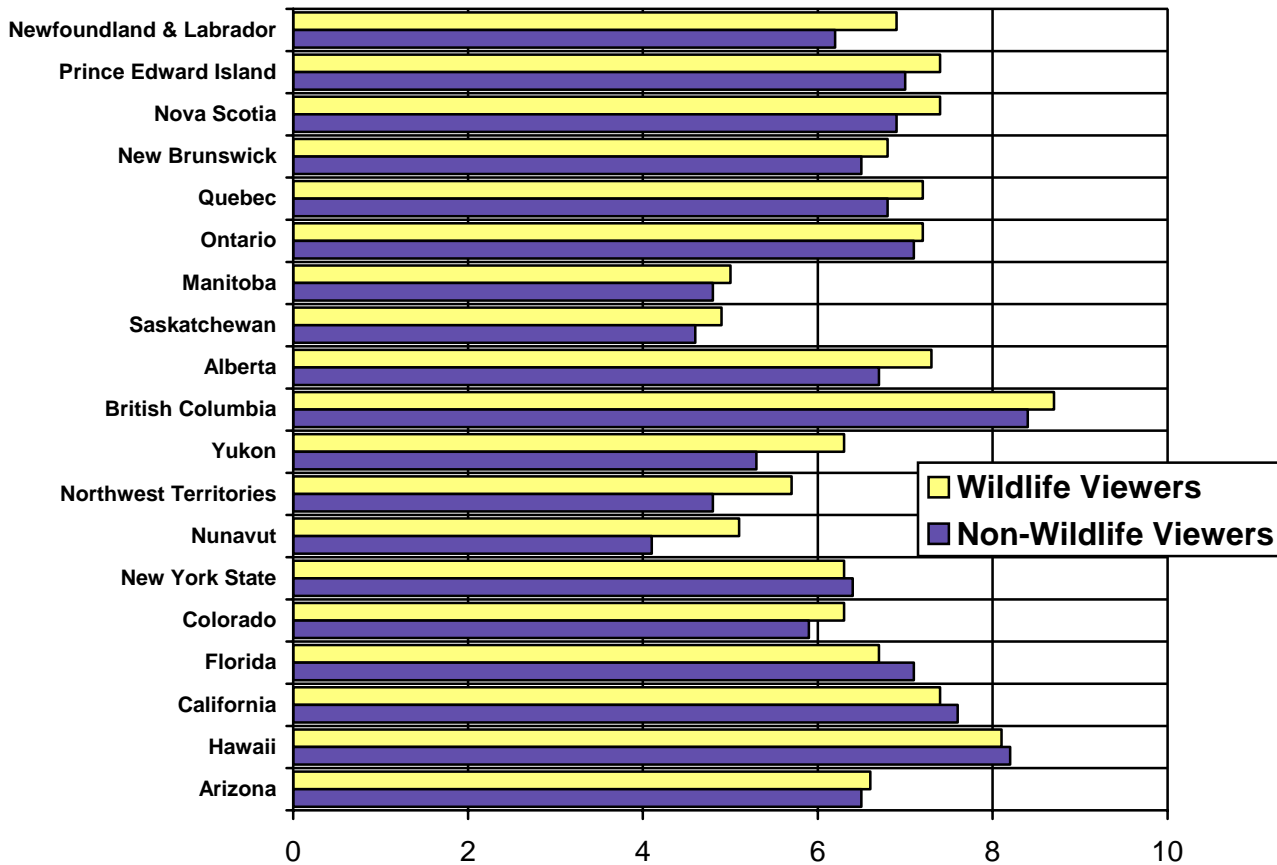
	Wildlife Viewers	Non-Wildlife Viewers	Pleasure Travelers	Index
Size of Market	7,605,527	10,833,982	18,439,508	100
Canada	97.9%	92.5%	94.8%	103
Took a trip within own province / region	92.3%	81.3%	85.9%	108
Took a trip to an adjacent province / region	56.5%	43.0%	48.6%	116
Took a trip to non-adjacent province / region	37.4%	27.3%	31.4%	119
Newfoundland and Labrador	4.9%	3.9%	4.3%	115
Prince Edward Island	9.5%	5.5%	7.2%	132
New Brunswick	14.2%	10.2%	11.8%	120
Nova Scotia	15.4%	10.8%	12.7%	121
Quebec	41.4%	37.2%	38.9%	106
Ontario	56.6%	51.4%	53.5%	106
Manitoba	11.1%	7.8%	9.2%	122
Saskatchewan	14.8%	9.0%	11.4%	130
Alberta	33.6%	20.4%	25.8%	130
British Columbia	37.8%	25.6%	30.6%	123
Yukon	1.7%	0.5%	1.0%	170
Northwest Territories	1.1%	0.4%	0.7%	166
Nunavut	0.5%	0.2%	0.3%	158
United States	52.7%	49.2%	50.7%	104
Mexico	13.6%	11.5%	12.4%	110
Caribbean	15.6%	15.6%	15.6%	100
All other destinations	26.1%	21.9%	23.6%	110

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, Wildlife Viewers were more likely than other Canadian Pleasure Travelers to rate Canadian Provinces and Territories as appealing destinations, and especially British Columbia, Alberta, the Atlantic Provinces and the northern territories. The appeal of the U.S. reference states is similar among Wildlife Viewers and Non-Wildlife Viewers. Overall, British Columbia was perceived as the most appealing destination by Wildlife Viewers.

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

Wildlife Viewers were more likely than the average Canadian Pleasure Traveler to have participated in outdoor activities while on a trip. The majority of Wildlife Viewers participated in ocean activities (e.g., sunbathing, swimming in ocean) and went hiking, climbing and paddling, as well as boating and swimming. Relative to the average Canadian Pleasure Traveler, Wildlife Viewers were also especially likely to participate in activities with a nature-theme such as wilderness activities, hiking, climbing and paddling, horseback riding, freshwater scuba and snorkeling and cross-country skiing and snowshoeing.

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

	Wildlife Viewers	Non-Wildlife Viewers	Pleasure Travelers	Index
Size of Market	7,605,527	10,833,982	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	64.1%	37.6%	48.5%	132
Hiking, Climbing & Paddling	56.7%	18.2%	34.1%	166
Boating & Swimming (e.g., motorboating, swimming in lakes)	56.4%	30.3%	41.1%	137
Sports & Games (e.g., tennis, board games)	33.7%	15.0%	22.7%	148
Fishing	29.6%	19.4%	23.6%	125
Exercising & Jogging	24.0%	10.2%	15.9%	151
Cycling	21.8%	7.7%	13.5%	161
Golfing	19.1%	17.7%	18.3%	104
Downhill Skiing & Snowboarding	18.1%	12.2%	14.6%	124
Skating (e.g., ice skating, rollerblading)	17.7%	7.9%	12.0%	148
Cross-country Skiing & Snowshoeing	15.4%	5.0%	9.3%	165
Snowmobiling & ATVing	14.2%	9.4%	11.3%	125
Team Sports (e.g., hockey, baseball)	12.4%	10.6%	11.4%	109
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	9.1%	4.3%	6.3%	145
Horseback Riding	8.5%	2.4%	4.9%	172
Hunting	5.2%	4.4%	4.7%	109
Freshwater Scuba & Snorkeling	5.0%	1.6%	3.0%	166
Wilderness Activities (e.g., wilderness skills course)	4.5%	0.9%	2.4%	189
Motorcycling	3.7%	2.5%	3.0%	123
Extreme Air Sports (e.g., parachuting)	1.5%	0.8%	1.1%	137

Outdoor Activities Pursued in a Typical Year

Wildlife Viewers are also quite active in outdoor activities while not traveling. Wildlife Viewers frequently go on day outings to parks and on picnics, swim, garden at home and exercise at home or at a fitness club. However, relative to the average Canadian Pleasure Traveler, Wildlife Viewers are especially likely to participate in nature-oriented activities such as hiking, camping, canoeing or kayaking, cross-country skiing, and horseback riding. They are less likely than average to play golf, ride an ATV or snowmobile or go hunting.

Fig. 7 Outdoor Activities Pursued in a Typical Year

	Wildlife Viewers	Non-Wildlife Viewers	Pleasure Travelers	Index
Size of Market	7,605,527	10,833,982	18,439,508	100
Day outing to a park	79.1%	58.3%	66.9%	118
Swimming	66.6%	55.9%	60.3%	110
Gardening	65.4%	55.8%	59.8%	109
Exercising at home or at a fitness club	64.5%	58.5%	61.0%	106
Picnicking	62.5%	46.4%	53.1%	118
Hiking	61.9%	39.6%	48.8%	127
Cycling	52.0%	38.9%	44.3%	117
Camping	49.1%	31.2%	38.6%	127
Ice-skating	32.2%	25.9%	28.5%	113
Fishing	30.2%	28.6%	29.3%	103
Jogging	27.4%	21.7%	24.1%	114
Golfing	27.2%	30.9%	29.4%	93
Sailing or other boating	25.9%	21.7%	23.4%	111
Canoeing or kayaking	24.1%	11.8%	16.9%	143
Playing team sports	24.0%	22.2%	22.9%	105
Playing racquet sports (e.g., tennis or badminton)	21.9%	17.2%	19.1%	114
Downhill skiing	18.5%	14.6%	16.2%	114
Cross-country skiing	16.6%	9.5%	12.5%	133
Rollerblading	15.5%	13.6%	14.4%	108
Riding an all-terrain vehicle (ATV)	13.7%	14.7%	14.3%	96
Snowmobiling	9.2%	10.2%	9.8%	94
Horseback riding	8.7%	5.5%	6.8%	127
Hunting	7.4%	8.0%	7.7%	95
Snowboarding	5.5%	4.7%	5.0%	109
Skateboarding	1.6%	1.6%	1.6%	101

Culture and Entertainment Activities Pursued While on Trips

Wildlife Viewers were more active than the average Canadian Pleasure Traveler in culture and entertainment activities while on trips and especially those which are intellectually stimulating. Relative to the average Canadian Pleasure Traveler, Wildlife Viewers were especially attracted to educational exhibits (e.g., science & technology exhibits; garden theme attractions) and educational participatory experiences (e.g., agro-tourism, aboriginal cultural experiences, participatory historical activities). They also exhibit above-average interest in high art performances, literary and film festivals and musical concerts.

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

	Wildlife Viewers	Non-Wildlife Viewers	Pleasure Travelers	Index
Size of Market	7,605,527	10,833,982	18,439,508	100
Shopping & Dining	91.6%	76.7%	82.9%	111
Historical Sites, Museums & Art Galleries	77.4%	44.9%	58.3%	133
Fairs & Festivals	52.9%	27.0%	37.7%	140
Theme Parks & Exhibits	52.5%	29.8%	39.2%	134
Musical Concerts, Festivals & Attractions	44.7%	24.3%	32.7%	137
Science & Technology Exhibits	32.8%	16.4%	23.1%	142
Wine, Beer & Food Tastings	32.3%	17.9%	23.8%	136
Casinos	29.5%	23.4%	25.9%	114
Garden Theme Attractions	28.4%	10.0%	17.6%	161
Live Theatre	26.7%	17.1%	21.1%	127
Agro-Tourism	23.5%	10.2%	15.7%	150
Aboriginal Cultural Experiences	21.5%	4.7%	11.6%	185
Professional Sporting Events	18.9%	13.4%	15.7%	120
High Art Performances	15.7%	7.7%	11.0%	143
Amateur Tournaments	15.1%	9.5%	11.8%	128
Spas	14.2%	7.1%	10.0%	142
Comedy Festivals & Clubs	13.2%	8.0%	10.1%	130
Participatory Historical Activities	12.7%	2.5%	6.7%	190
Equestrian & Western Events	9.6%	4.6%	6.7%	144
National & International Sporting Events	4.4%	2.4%	3.2%	136
Literary & Film Festivals	4.3%	1.3%	2.6%	168

Culture and Entertainment Activities Pursued in a Typical Year

Wildlife Viewers were more active than the average Canadian Pleasure Traveler while not traveling. They exhibit particular interest in educational exhibits (e.g., botanical gardens, museums, art galleries). They are also more likely than average to attend live arts performances (e.g., classical music concerts, jazz, ballet, opera). On the other hand, Wildlife Viewers are less likely to go gambling in a casino.

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

	Wildlife Viewers	Non-Wildlife Viewers	Pleasure Travelers	Index
Size of Market	7,605,527	10,833,982	18,439,508	100
Going out to eat in restaurants	92.7%	90.7%	91.5%	101
Going to festivals or fairs	68.5%	56.5%	61.4%	112
Going to historic sites or heritage buildings	47.6%	33.5%	39.3%	121
Going to pick-your-own farms or farmers' market	47.5%	36.4%	41.0%	116
Going to amateur sporting events	44.0%	40.6%	42.0%	105
Going to museums	41.3%	26.7%	32.7%	126
Going to art galleries or art shows	39.3%	26.5%	31.8%	124
Going to live theatre	38.0%	32.5%	34.8%	109
Going to zoos or aquariums	36.6%	26.1%	30.4%	120
Going to amusement or theme parks	32.9%	26.1%	28.9%	114
Going to botanical gardens	32.2%	20.6%	25.4%	127
Going dancing	31.4%	28.8%	29.9%	105
Going to bars with live pop or rock bands	31.2%	25.2%	27.7%	113
Going to professional sporting events	31.2%	32.6%	32.1%	97
Going to rock music concerts	24.4%	21.0%	22.4%	109
Going to classical music concerts	20.0%	14.0%	16.5%	121
Going to gamble in casinos	16.3%	19.4%	18.1%	90
Going to day spas	14.8%	13.0%	13.8%	107
Staying overnight in a hotel or B&B in own city	10.7%	9.3%	9.9%	108
Going to jazz clubs	9.6%	6.1%	7.5%	127
Going to the ballet	9.2%	6.0%	7.3%	126
Going to rodeos	8.2%	6.7%	7.3%	112
Going to the opera	7.6%	5.9%	6.6%	115

Accommodation Stayed In While on a Trip

The appeal of nature to Wildlife Viewers is clearly evident in the types of accommodation stayed in during the past two years. Wildlife Viewers most often stayed in public campgrounds while on trips. They also frequently stayed at lakeside or riverside resorts and were much more likely than the average Canadian Pleasure Traveler to have stayed in accommodation in a wilderness setting (e.g., wilderness lodge accessible by car, remote or fly-in wilderness lodge or outpost).

Fig. 10 Accommodation Stayed in While on Trips

	Wildlife Viewers	Non-Wildlife Viewers	Pleasure Travelers	Index
Size of Market	7,605,527	10,833,982	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	40.9%	16.1%	26.4%	155
Lakeside / Riverside Resort	29.7%	17.1%	22.3%	133
Seaside Resort	27.8%	15.8%	20.7%	134
A Private Campground	26.5%	13.4%	18.8%	141
Ski Resort or Mountain Resort	18.3%	10.9%	13.9%	131
A Camp Site in a Wilderness Setting (Not a Campground)	13.6%	5.1%	8.6%	159
Wilderness Lodge You Can Drive to by Car	8.9%	3.4%	5.6%	157
Health Spa	7.7%	4.7%	5.9%	129
Country Inn or Resort with Gourmet Restaurant	7.4%	3.5%	5.1%	145
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	6.5%	3.0%	4.5%	146
Farm or Guest Ranch	4.9%	1.8%	3.0%	160
Remote or Fly-In Wilderness Lodge	2.5%	1.0%	1.6%	155
On a Houseboat	2.1%	0.9%	1.4%	152
Remote or Fly-In Wilderness Outpost	0.8%	0.4%	0.6%	140
Cooking School	0.3%	0.4%	0.4%	98
Wine Tasting School	0.2%	0.3%	0.3%	78

Tours and Cruises Taken During Past Two Years

Wildlife Viewers were more likely than the average Canadian Pleasure Traveler to have taken tours and cruises in the past two years. The tours taken most often taken include sameday tours, scenic countryside drives and city tours. Relative to the average Canadian Pleasure Traveler, Wildlife Viewers were especially likely to have taken self-guided, multi-location tours, wilderness tours, sightseeing cruises, air tours and tours of wineries and factories.

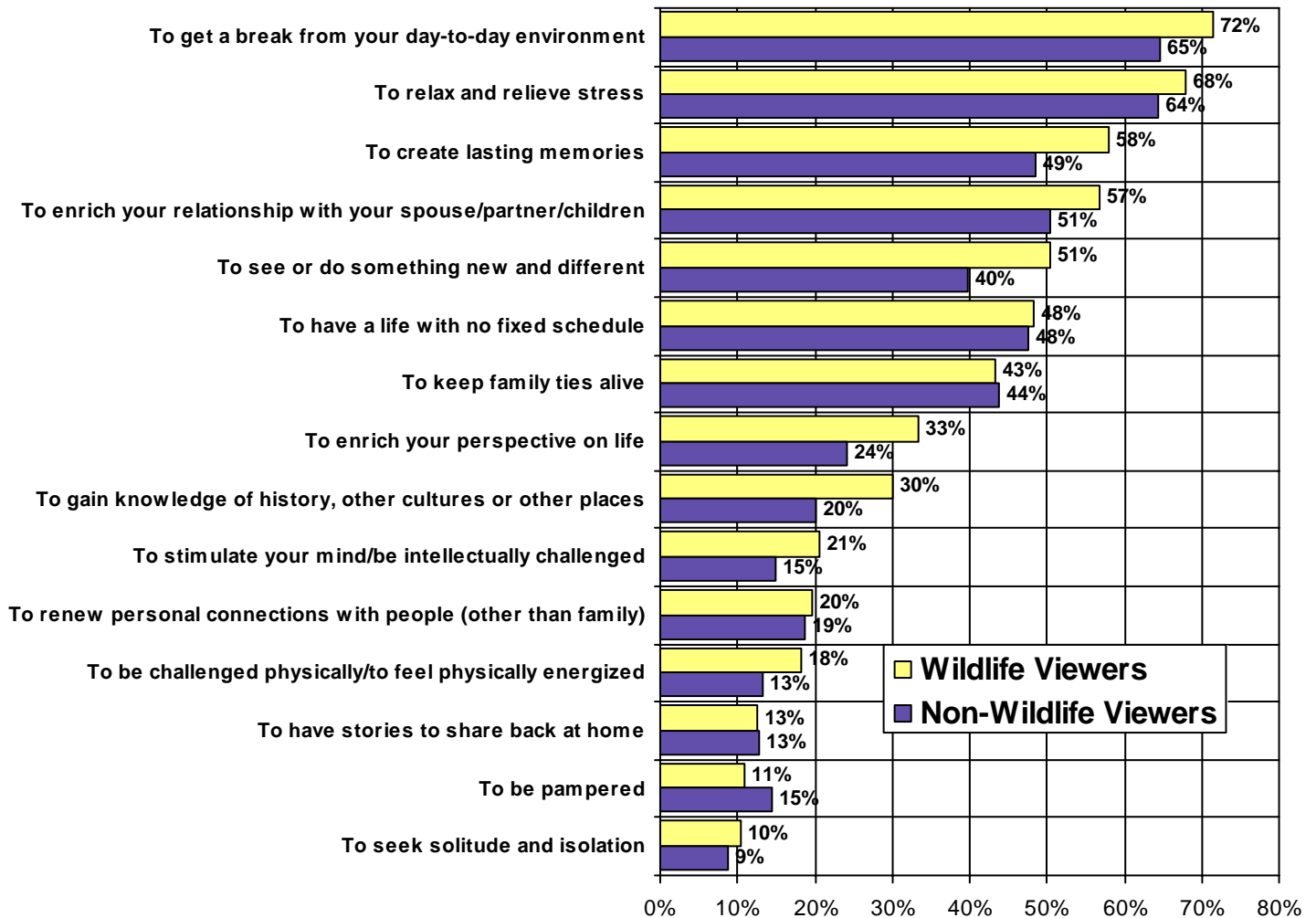
Fig. 11 Tours and Cruises Taken During Past Two Years

	Wildlife Viewers	Non-Wildlife Viewers	Pleasure Travelers	Index
Size of Market	7,605,527	10,833,982	18,439,508	100
A self-guided, sameday tour while on an overnight trip	41.6%	20.7%	29.3%	142
Around the countryside - scenic drives	33.3%	14.8%	22.4%	148
Around the city	31.2%	17.9%	23.4%	134
An organized, sameday, guided tour while on an overnight trip	30.9%	16.1%	22.2%	139
A self-guided, overnight tour where you stayed in different locations	27.0%	11.9%	18.1%	149
Wilderness tour	22.6%	6.3%	13.0%	173
On the water (sightseeing cruise)	20.4%	8.0%	13.1%	156
Some other type of tour	14.6%	6.5%	9.8%	149
An organized, overnight, guided tour where you stayed in different locations	12.2%	8.6%	10.1%	121
An organized, overnight, guided tour where you stayed in a single location	10.3%	6.1%	7.8%	132
To a casino	8.4%	5.2%	6.5%	129
To a winery	8.1%	3.9%	5.6%	144
Caribbean ocean cruise	5.2%	5.5%	5.4%	97
To a factory	4.1%	1.6%	2.6%	156
Ocean cruise – Other	3.9%	2.9%	3.3%	118
Cruise on another lake or river	3.2%	1.8%	2.4%	135
In the air as a pilot or passenger of an airplane or helicopter	2.9%	1.2%	1.9%	153
Cruise on the St. Lawrence River	2.7%	1.4%	1.9%	138
Some other type of cruise	1.9%	1.4%	1.6%	121
Alaskan ocean cruise	1.9%	1.5%	1.6%	114
Great Lakes cruise	1.0%	0.6%	0.8%	129
Submarine cruise	0.1%	0.1%	0.1%	107

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travelers, Wildlife Viewers generally 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 see or do something new or different. However, relative to other Canadian Pleasure Travelers, Wildlife Viewers are especially likely to seek out opportunities to learn (e.g., enrich perspective on life, gain knowledge of the history or cultures of places, mental stimulation or challenge) while on vacation.

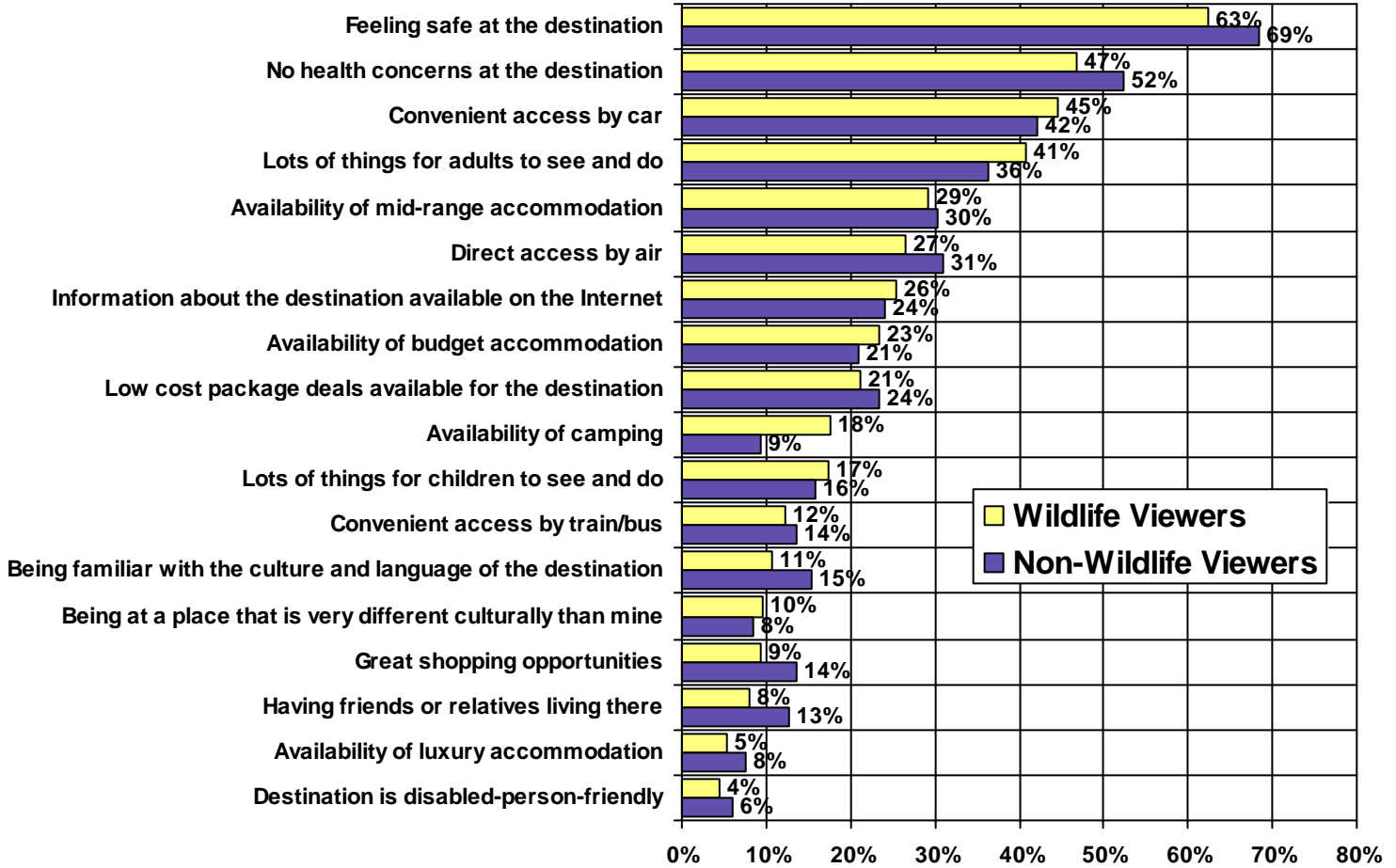
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, Wildlife Viewers consider it important that they feel safe at a destination (although to a lesser extent than the average Canadian Pleasure Travelers). They are more likely to consider it important that a destination has camping available and lots of things for adults to see and do

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



How Destinations are Selected

Similar to the majority of Canadian Pleasure Travelers, Wildlife Viewers tend to start planning trips with a particular destination in mind. However, Wilderness Viewers are somewhat more likely to begin planning a vacation by considering what activities they would like to do.

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

	Wildlife Viewers	Non-Wildlife Viewers	Pleasure Travelers	Index
Size of Market	7,605,527	10,833,982	18,439,508	100
Summer				
Started with a desired destination in mind	50.0%	47.3%	48.5%	103
Started by considering specific activities wanted to do	15.6%	12.4%	13.8%	113
Started with a certain type of vacation experience in mind	24.2%	23.3%	23.7%	102
Looked for packaged deals - no destination in mind	1.2%	1.4%	1.3%	92
Considered something else first	3.9%	4.6%	4.3%	90
Don't know / Other	5.2%	10.9%	8.4%	61
Winter				
Started with a desired destination in mind	47.7%	49.3%	48.6%	98
Started by considering specific activities wanted to do	17.5%	14.0%	15.6%	112
Started with a certain type of vacation experience in mind	21.1%	17.8%	19.3%	109
Looked for packaged deals - no destination in mind	2.8%	3.5%	3.2%	87
Considered something else first	4.3%	4.9%	4.7%	93
Don't know / Other	6.6%	10.4%	8.6%	76

Trip Planning and Information Sources Consulted

The majority of Wildlife Viewers were responsible for planning trips either on their own (40.3%) or with someone else (16.0%).

When making vacation plans, Wildlife Viewers consulted a wider variety of sources than the average Canadian Pleasure Traveler. The majority in this segment used the Internet, word-of-mouth and past experiences to plan travel. Wildlife Viewers were also particularly more likely than average to obtain trip planning information from official travel brochures or guides and visitor information centres. They also frequently obtain travel information from programs on television, trade, travel or sports shows, guidebooks such as Fodor's and from information received in the mail.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Wildlife Viewers	Non-Wildlife Viewers	Pleasure Travelers	Index
Size of Market		7,605,527	10,833,982	18,439,508	100
Who Plans Trips?	Respondent plans trips	40.3%	43.4%	42.0%	96
	Trip planning a shared responsibility	16.0%	16.8%	16.4%	97
	Someone else plans trips	43.8%	39.8%	41.5%	105
Information Sources Consulted	An Internet website	73.5%	59.0%	65.2%	113
	Advice of others / Word-of-mouth	61.2%	43.5%	51.1%	120
	Past experience / Been there before	59.8%	43.3%	50.4%	119
	Maps	42.8%	24.8%	32.6%	132
	Official travel guides or brochures from state / province	38.6%	16.3%	26.0%	149
	A travel agent	35.7%	32.9%	34.1%	105
	Visitor information centres	34.5%	15.0%	23.4%	148
	Articles in newspapers/magazines	26.7%	16.5%	20.9%	128
	An auto club such as CAA	22.8%	13.8%	17.7%	129
	Travel guide books such as Fodor's	19.0%	9.6%	13.6%	139
	Advertisements in newspapers / magazines	18.3%	11.2%	14.3%	128
	Travel information received in the mail	12.1%	6.4%	8.8%	137
	Programs on television	10.9%	4.9%	7.5%	145
	Advertisements on television	6.3%	4.0%	5.0%	127
	An electronic newsletter or magazine received by e-mail	5.3%	3.3%	4.2%	128
Visits to trade, travel or sports shows	4.4%	2.1%	3.1%	143	

Use of the Internet to Plan and Arrange Trips

Wildlife Viewers are more likely than the average Canadian Pleasure Traveler to use the Internet to plan (69.2%) and book (44.9%) travel. The majority of Wildlife Viewers use hotel or resort websites and the tourism websites for specific countries, regions or cities. Accommodation and airline tickets were the trip components most often purchased over the Internet.

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

		Wildlife Viewers	Non-Wildlife Viewers	Pleasure Travelers	Index
	Size of Market	7,605,527	10,833,982	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	30.8%	47.9%	40.8%	75
	Uses Internet to plan trips only	24.3%	20.6%	22.1%	110
	Uses Internet to book part of trip	44.9%	31.5%	37.0%	121
Types of Websites Consulted	A website of a hotel or resort	59.8%	54.4%	57.0%	105
	A tourism website of a country / region / city	57.3%	42.7%	49.8%	115
	An airline website	48.3%	44.5%	46.3%	104
	A travel planning/booking website	45.8%	45.6%	45.7%	100
	A website of an attraction	40.9%	28.3%	34.5%	119
	Some other website	30.2%	25.1%	27.6%	110
	A cruise line website	8.3%	7.9%	8.1%	102
	A motorcoach website	3.0%	2.0%	2.5%	121
Parts of Trips Booked Over The Internet	Accommodation	71.5%	66.8%	69.2%	103
	Air tickets	70.2%	68.7%	69.5%	101
	Car rental	28.3%	26.0%	27.1%	104
	Tickets or fees for specific activities or attractions	26.3%	21.0%	23.6%	111
	Tickets for rail, bus or boat/ship fares	17.9%	12.8%	15.3%	117
	A package containing two or more items	15.0%	15.8%	15.4%	97
	Other	4.7%	3.2%	3.9%	119

Media Consumption Habits

Wildlife Viewers are more likely than the average Canadian Pleasure Traveler to consume travel-related media, including the travel sections of newspapers, travel magazines, travel websites, and travel programs on television. This segment can be most effectively targeted through media with a natural science theme (e.g., science & geography magazines, science & nature television programming) or a home decorating or crafts theme (e.g., house & home websites; home & garden television programming; crafts, antiques & collectibles magazines).

Fig. 17 Media Consumption Habits

		Wildlife Viewers	Non-Wildlife Viewers	Pleasure Travelers	Index
Size of Market		7,605,527	10,833,982	18,439,508	100
Newspaper Readership	Reads daily newspaper	87.4%	87.1%	87.3%	100
	Reads weekend edition of newspaper	87.6%	87.1%	87.3%	100
	Reads local neighbourhood or community newspapers	65.0%	59.1%	61.5%	106
	Reads other types of newspapers	19.2%	15.7%	17.2%	112
	Frequently or occasionally reads travel section of daily newspaper	48.4%	43.9%	45.7%	106
	Frequently or occasionally reads travel section of weekend newspaper	51.0%	44.8%	47.3%	108
Types of Magazines Read (Top 5 Indexed)	Science and geography	22.8%	12.3%	16.6%	137
	Magazines about your city	14.5%	10.2%	12.0%	121
	Travel (e.g., Condé Nast)	14.1%	10.1%	11.8%	120
	Crafts, antiques and collectibles	15.0%	10.8%	12.5%	120
	Regional magazines	9.2%	6.9%	7.9%	117
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	35.0%	27.0%	30.3%	116
	Science & nature shows	50.5%	39.2%	43.8%	115
	Science fiction / Fantasy shows	20.7%	18.1%	19.2%	108
	Home & garden shows	35.9%	32.9%	34.2%	105
	History	42.9%	41.0%	41.8%	103
Type of Radio Programs Listened To (Top 5 Indexed)	Jazz / Big band	10.4%	7.6%	8.8%	119
	Multicultural	9.9%	7.3%	8.4%	118
	Classical music	20.2%	15.2%	17.2%	117
	News / Talk / Information	44.1%	36.1%	39.4%	112
	Modern rock / Alternative rock	40.9%	34.4%	37.1%	110
Types of Websites Visited (Top 5 Indexed)	Travel	56.0%	46.3%	50.6%	111
	Network news sites (e.g., CBC, CNN)	39.1%	33.8%	36.1%	108
	House and home	30.0%	26.7%	28.1%	107
	Shopping (all types)	34.9%	32.4%	33.5%	104
	Health	45.1%	42.3%	43.5%	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 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