Travel Activities & Motivation Survey

Interest in Golf

Profile Report

TAMS
Travel Attitudes &
Motivation Survey

April, 2001

Lang
RESEARCH

Travel Activities & Motivation Survey

Prepared By:

Lang Research Inc.

…on behalf of…

Atlantic Tourism Partnership

Canadian Tourism Commission

Department of Canadian Heritage

Greater Toronto Hotel Association

Manitoba Ministry of Industry, Trade & Tourism

Northern Ontario Heritage Fund

Ontario Casino Corporation

Ontario Ministry of Agriculture, Food and Rural Affairs

Ontario Ministry of Tourism, Culture & Recreation

Ontario Tourism Marketing Partnership

Parks Canada

Saskatchewan Tourism Authority

Tourism B.C.

Tourism Toronto

Yukon Government Department of Tourism

TAMS
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Lang RESEARCH

Interest In Golf

- Key Findings -

5.1 % of U.S. travelers and 4.1 % of Canadian travelers were considered Avid Golfers (i.e., those who frequently or occasionally play golf and to have played golf while on a trip during the past 2 years). 36.7 % of Canadian travelers and 27.9 % of American travelers were considered Occasional Golfers. Canadian travelers were 23.6 % more likely to be classified as “Occasional Golfers” than Americans. 33.0 % of American travelers and 40.8 % of the Canadian travelers have played golf during the past 2 years. In terms of day-to-day golf activity alone, 25.8 % of American travelers and 31.0 % of Canadians travelers play golf at least occasionally. As well, 22.5 % of Canadians travelers and 17.9 % of Americans travelers have played golf at least once while on a trip during the past two years. Golf is clearly a very popular activity in both Canada and the U.S.

In Canada, males were 62 % more likely to have played golf than females and 103 % more likely to be “Avid Golfers”. In the United States, males were 38 % more likely to have played golf than females and 46 % more likely to be classified as “Avid Golfers”. In both countries, the incidence of golfers is higher among Young Singles, Young Couples and Young Families. The higher incidence of golf within the younger segments suggests that golf may be an emergent sport with considerable growth potential in the years to come. However, Affluent Mature and Senior Couples are the most likely to be Avid Golfers and this is a prime target market for golf related tourism promotions aimed at golf enthusiasts. Participation in golf is weakly related to the education level of the respondent, but does tend to increase as the household income increases.

Canadian Avid Golfers who traveled domestically were more likely to have visited Prince Edward Island than other provinces suggesting that this destination is very appealing to golf enthusiasts. American golfers who visited Canada were more likely to have visited the western provinces. In part, this reflects that fact that golf is a more popular sport in the states that border the western provinces than in others parts of the United States.

Golfers were more likely to have sought out vacation experiences associated with sports (i.e., to participate in a hobby or sport) but are also quite interested in personal indulgence (e.g., to experience the good life, visiting a casino, experiencing city life such as night life) and romance and relaxation (e.g., experience intimacy and romance, relax and recuperate). Advertising and promotional materials designed to promote golf should emphasize the opportunities for entertainment, personal indulgence and relaxation offered by the destination.

Interest In Golf

- Key Findings (Continued) -

Both Avid and Occasional Golfers tend to be more interested in most outdoor activities than Non-Golfers. However, Avid Golfers are less interested in non-golf related outdoor activities than Occasional Golfers, who appear to value an eclectic outdoor experience involving a broad range of outdoor activities and not just golf.

There is a strong association between interest in golf and interest in professional sports. This is evident both in the incidence of golfers who attend professional sporting events while traveling as well as the extent to which golfers watch professional sports on television and read sports-related magazines (e.g., Sports Illustrated). Golfers were also more likely to watch news programming than those who do not play golf. Golfers also exhibit considerable interest in wine tours and cruises (including Great Lake Cruises). Combining golf packages with wine tours may be especially appealing to Avid Golfers.

Avid Golfers consult a larger variety of information sources when planning brief and longer vacations and especially travel agents, the Internet, newspaper and magazine articles, airline reservation systems, newspaper and magazine advertising and direct mail material. Occasional Golfers also consult a larger array of information sources than Non-Golfers when planning vacations such as the Internet, travel agents and newspaper and magazine advertising, but fewer information sources than Avid Golfers. These patterns reflect the affluence of Avid and Occasional Golfers relative to Non-Golfers.

Among Canadians, there is little association between interest in golf and the impressions held about Canada and Ontario as a vacation destination. However, American who are Avid Golfers perceive Canada and Ontario to offer fewer opportunities for culture and entertainment than Americans who do not play golf.

An assessment of the overall market potential indicates that in Canada the five affluent segments (i.e., Affluent Young Singles, Affluent Young Couples, Affluent Families, Affluent Mature Couples, Affluent Mature and Senior Couples) are the most likely to be responsive to golf-related promotional initiatives. There is little difference in the market potential of these five segments and they represent 24.5 % of the Canadian travelers. In the United States, the greatest potential is offered by the Affluent Mature and Senior Couples and the Affluent Young Couples. These two segments represent 9.0 % of the U.S. travelers.

Background

An association of Canadian Tourism Ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. The TAMS database consisted of a telephone survey and a self-completed mail-back survey. The survey was conducted in Canada and the United States between September 27, 1999 to April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. Persons participating in the telephone survey who had traveled in the past two years or expressed interest in travel in the next two years were asked to complete a mail-back questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these 11,892 (29.4 %) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 %) returning the questionnaire while 6,405 (26.0 %) of the U.S. respondents returned the questionnaire.

This current study examines interest in golf while not traveling as well as golf-related activities while on vacation. The database was used to identify sectors of the market that exhibit a moderate interest (Occasional Golfers) and high interest (Avid Golfers) in golf. This report provides the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations and impressions of Canada and Ontario relative to the interest shown in golf. This report also provides an overall market potential of each segment of the market to identify those segments that offer the best potential for marketing, advertising and promotional activities designed to promote Canada's/Ontario's golf vacation products.

Golf Activity Index

Construction of the Index

The TAMS Mailback survey contained four items specifically associated with golf that were use to construct an overall Golf Interest index. These were:

- Whether the respondent played golf while not traveling “frequently”, “occasionally”, “rarely” or “not at all”.
- Whether the respondent did any of the following golf related activities while traveling in the past 2 years:
  - Playing the occasional game of golf while on a trip
  - Staying at a golf resort for one or more nights
  - Taking a packaged golf tour to play on various courses

The responses to the first of these items (i.e,. the extent to which golf is played while not traveling) was converted into a four point scale where “Not at all” was set to “0”, “Rarely” was set to “1”, “Occasionally” was set to “2” and “Frequently” was set to “3”. The three golf-related travel activities were converted into binary variables where “0” was “Did not participate” and “1” was “Did Participate”. The four items were summed to produce an overall score ranging from “0” to “6”. This score was reduced to three levels as follows: A score of “0” was set to “No golf activity” and score between “1” and “3” was set to “Occasional Golfer” and a score between “4” and “6” was set to “Avid Golfer”.

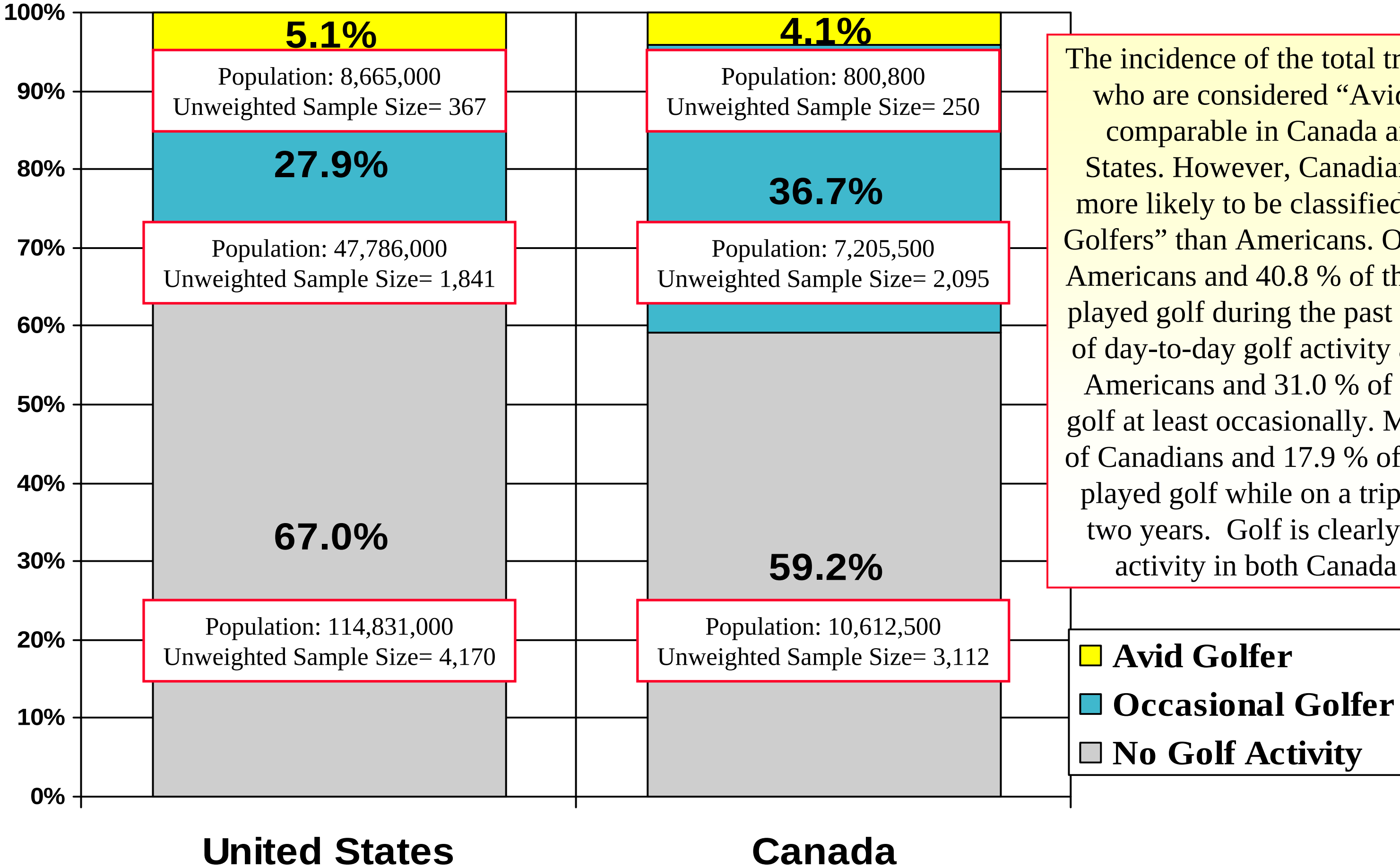
Note, this scoring scheme meant that in order to qualify as an “Avid Golfer”, “frequent day-to-day” golfers were required to participated in at least one golf-related activity while on a trip, “occasional day-to-day” golfers were required to participated in at least two golf-related activity while on a trip and those who golfed “rarely” were required to participated in all three golf-related activities while on a trip. Those who did not golf while not traveling and had not participated in any golf-related trip activity were classified as “Non-Golfers”. All others were classified as “Occasional Golfers”.

Interest in Golf

Canada versus United States

Based on Day-to-Day Golfing & Golf Activity While Traveling in the Past 2 Years

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

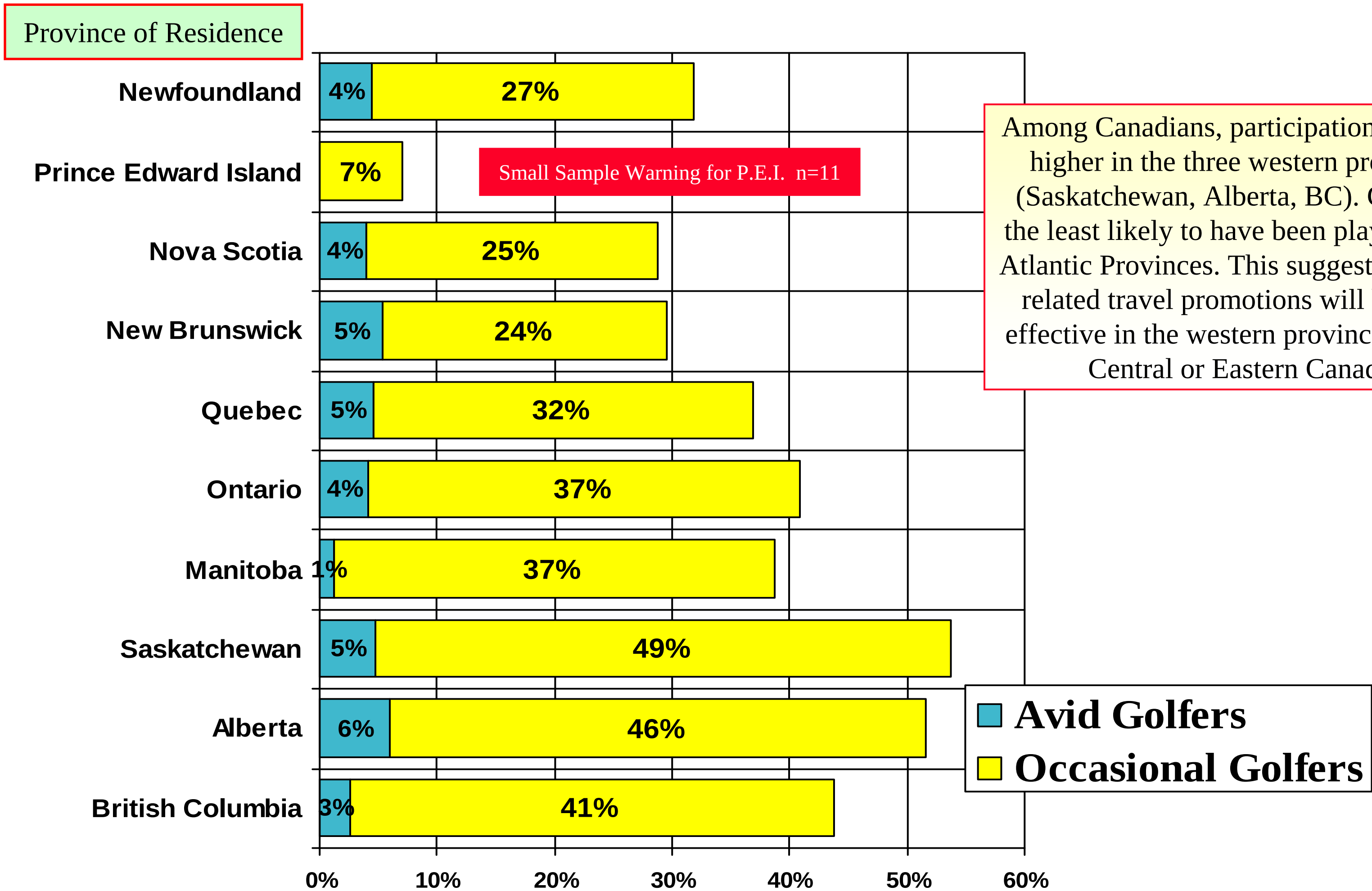


The incidence of the total travelers (18 plus) who are considered "Avid Golfers" was comparable in Canada and the United States. However, Canadians were 23.6 % more likely to be classified as "Occasional Golfers" than Americans. Overall, 33.0 % of Americans and 40.8 % of the Canadians had played golf during the past 2 years. In terms of day-to-day golf activity alone, 25.8 % of Americans and 31.0 % of Canadians play golf at least occasionally. Moreover, 22.5 % of Canadians and 17.9 % of Americans have played golf while on a trip during the past two years. Golf is clearly a very popular activity in both Canada and the U.S.

Interest in Golf: Based on Day-to-Day and Past Travel Activity

Canada:By Province

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

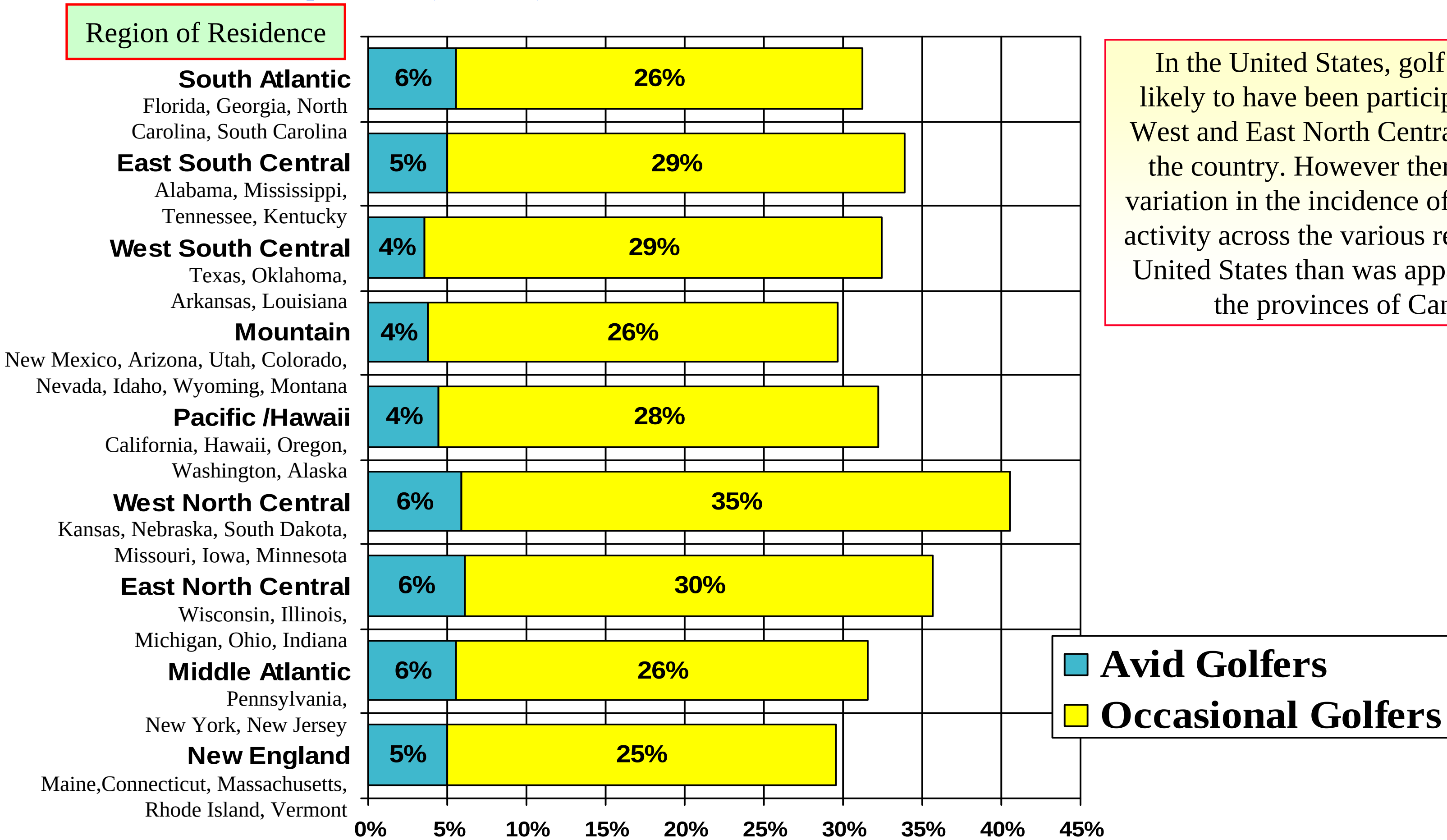


Among Canadians, participation in golf is higher in the three western provinces (Saskatchewan, Alberta, BC). Golf was the least likely to have been played in the Atlantic Provinces. This suggests that golf related travel promotions will be more effective in the western provinces than in Central or Eastern Canada.

Interest in Golf: Based on Day-to-Day and Past Vacation Activity

United States:By Region

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



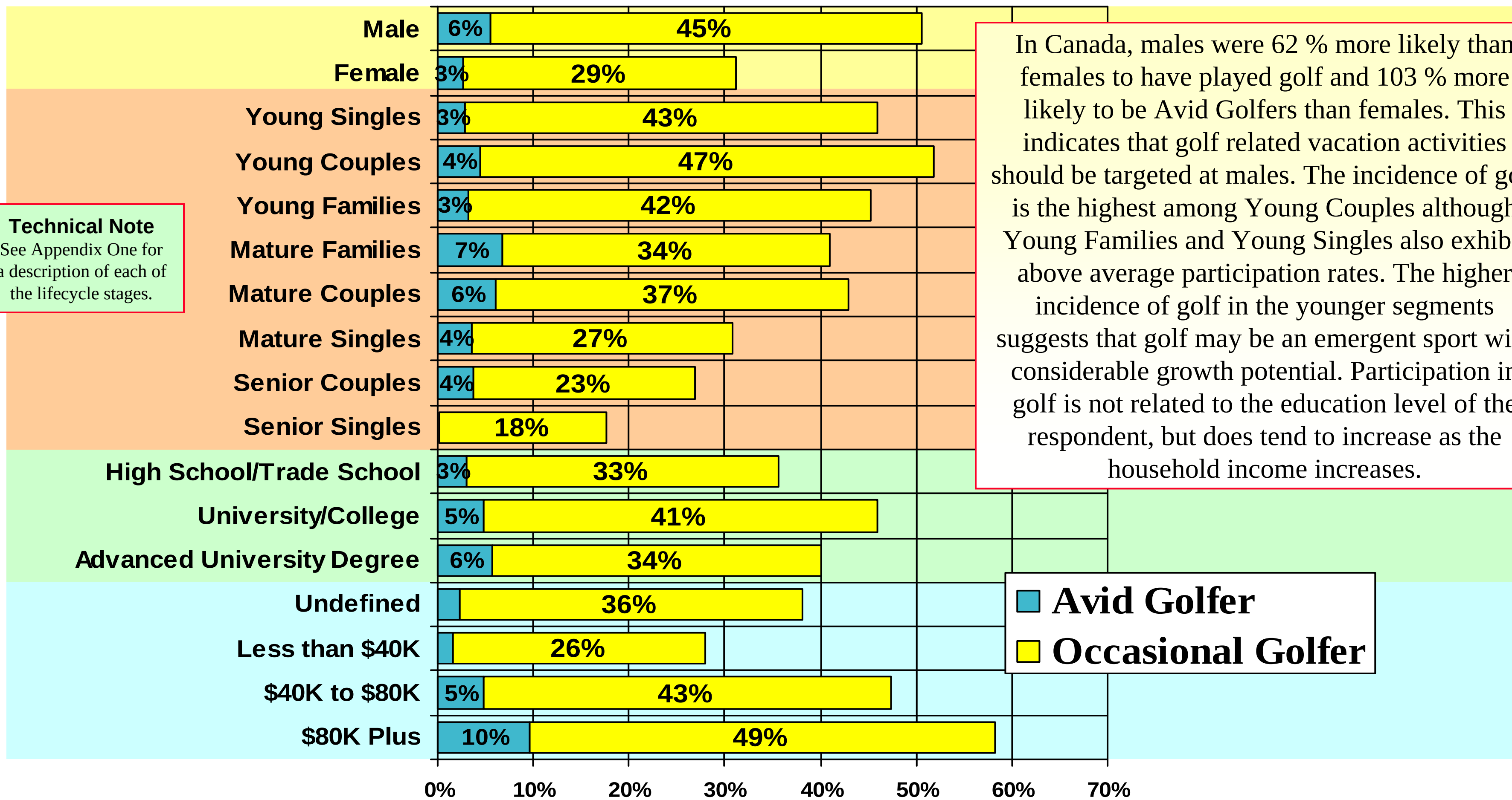
In the United States, golf was most likely to have been participated in the West and East North Central regions of the country. However there was less variation in the incidence of golf related activity across the various regions of the United States than was apparent across the provinces of Canada.

Interest in Golf

Canada:By Demographics

Based on Day-to-Day and Past Vacation Activity

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



Technical Note
See Appendix One for a description of each of the lifecycle stages.

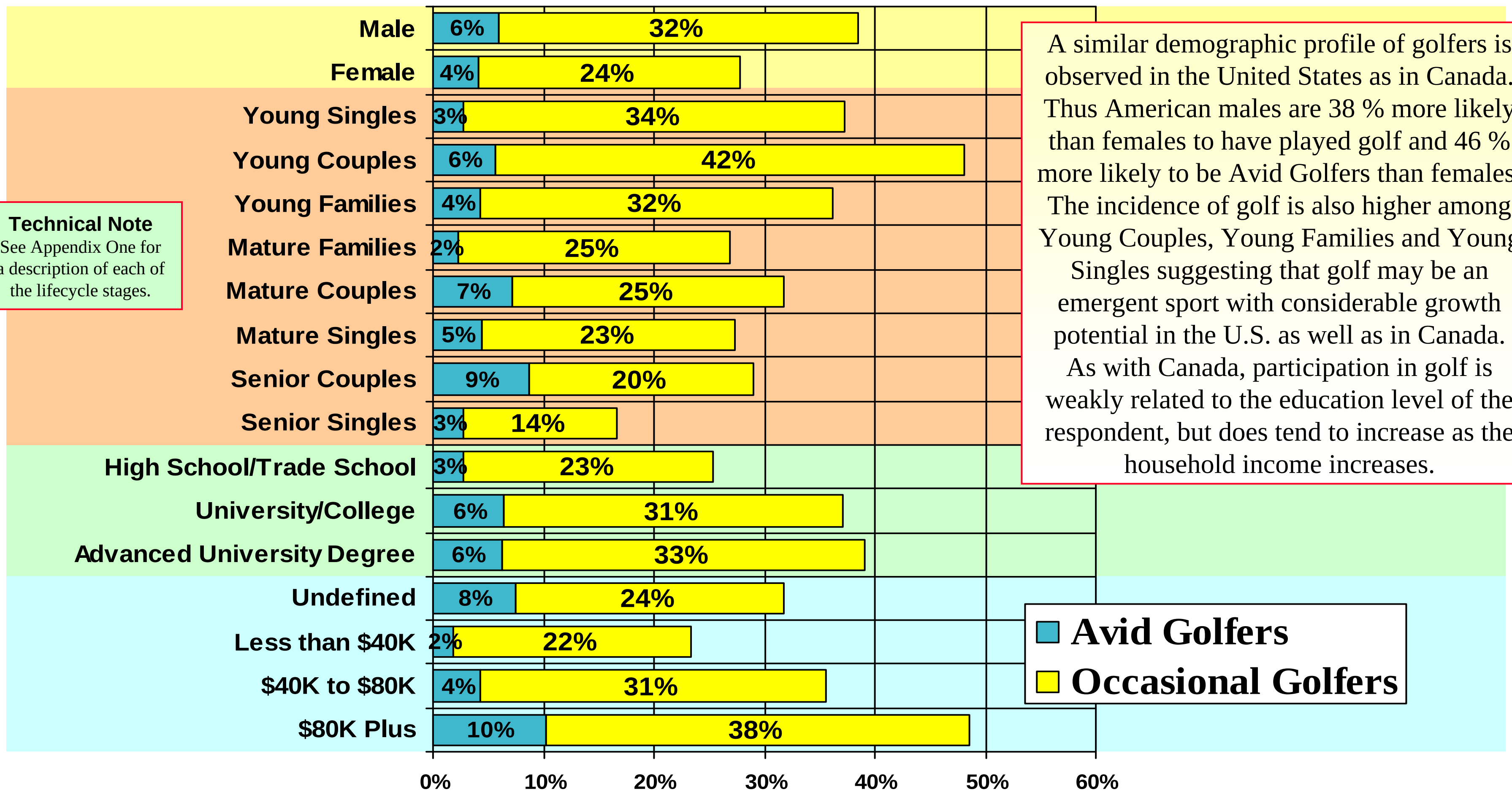
In Canada, males were 62 % more likely than females to have played golf and 103 % more likely to be Avid Golfers than females. This indicates that golf related vacation activities should be targeted at males. The incidence of golf is the highest among Young Couples although Young Families and Young Singles also exhibit above average participation rates. The higher incidence of golf in the younger segments suggests that golf may be an emergent sport with considerable growth potential. Participation in golf is not related to the education level of the respondent, but does tend to increase as the household income increases.

Interest in Golf

United States:By Demographics

Based on Day-to-Day and Past Vacation Activity

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



Technical Note
See Appendix One for a description of each of the lifecycle stages.

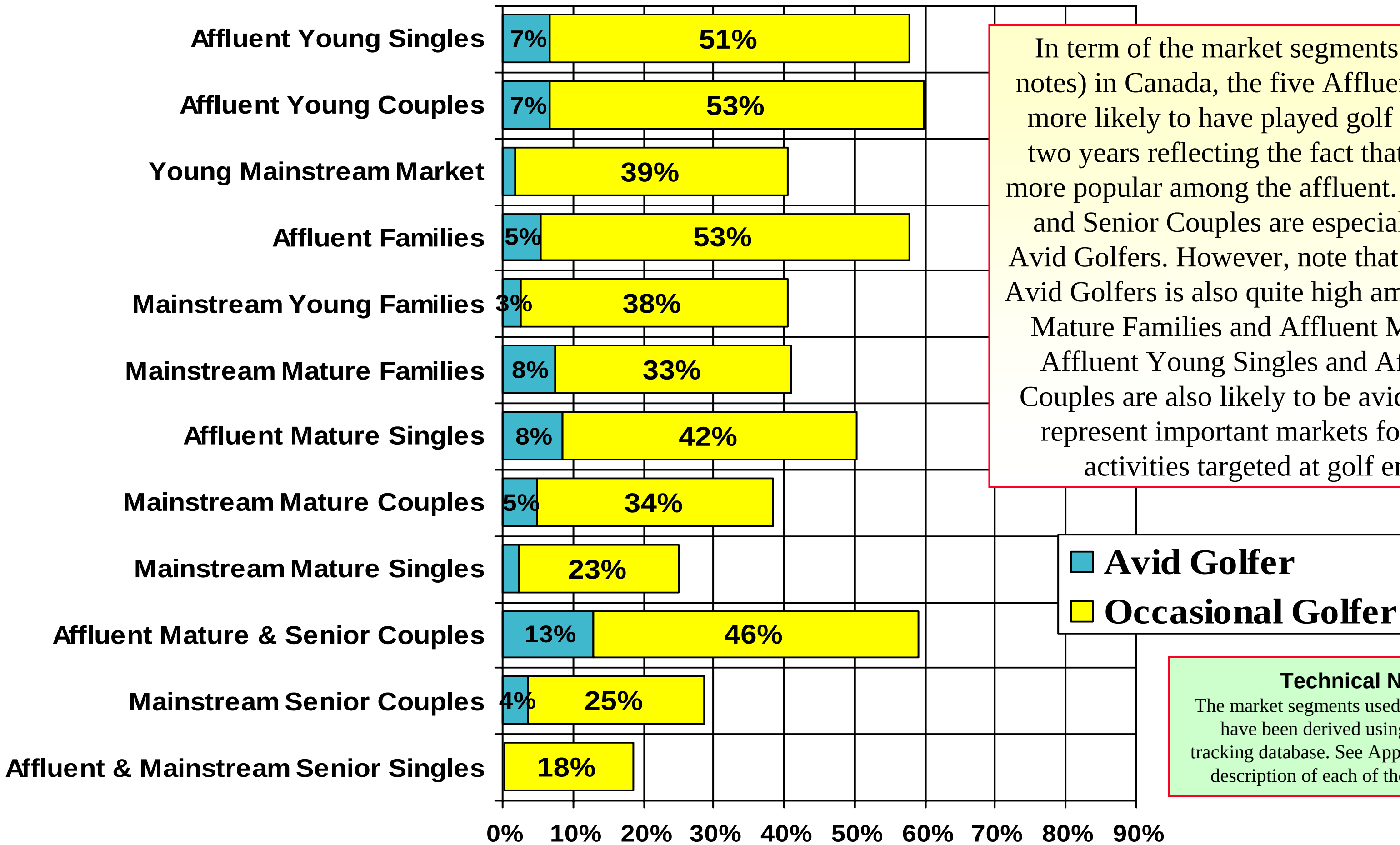
A similar demographic profile of golfers is observed in the United States as in Canada. Thus American males are 38 % more likely than females to have played golf and 46 % more likely to be Avid Golfers than females. The incidence of golf is also higher among Young Couples, Young Families and Young Singles suggesting that golf may be an emergent sport with considerable growth potential in the U.S. as well as in Canada. As with Canada, participation in golf is weakly related to the education level of the respondent, but does tend to increase as the household income increases.

Interest in Golf

Canada:By Market Segment

Based on Day-to-Day and Past Vacation Activity

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



In term of the market segments (see technical notes) in Canada, the five Affluent Segments are more likely to have played golf during the past two years reflecting the fact that golf is clearly more popular among the affluent. Affluent Mature and Senior Couples are especially likely to be Avid Golfers. However, note that the incidence of Avid Golfers is also quite high among Mainstream Mature Families and Affluent Mature Singles. Affluent Young Singles and Affluent Young Couples are also likely to be avid golfers. These represent important markets for promotional activities targeted at golf enthusiasts.

Technical Note

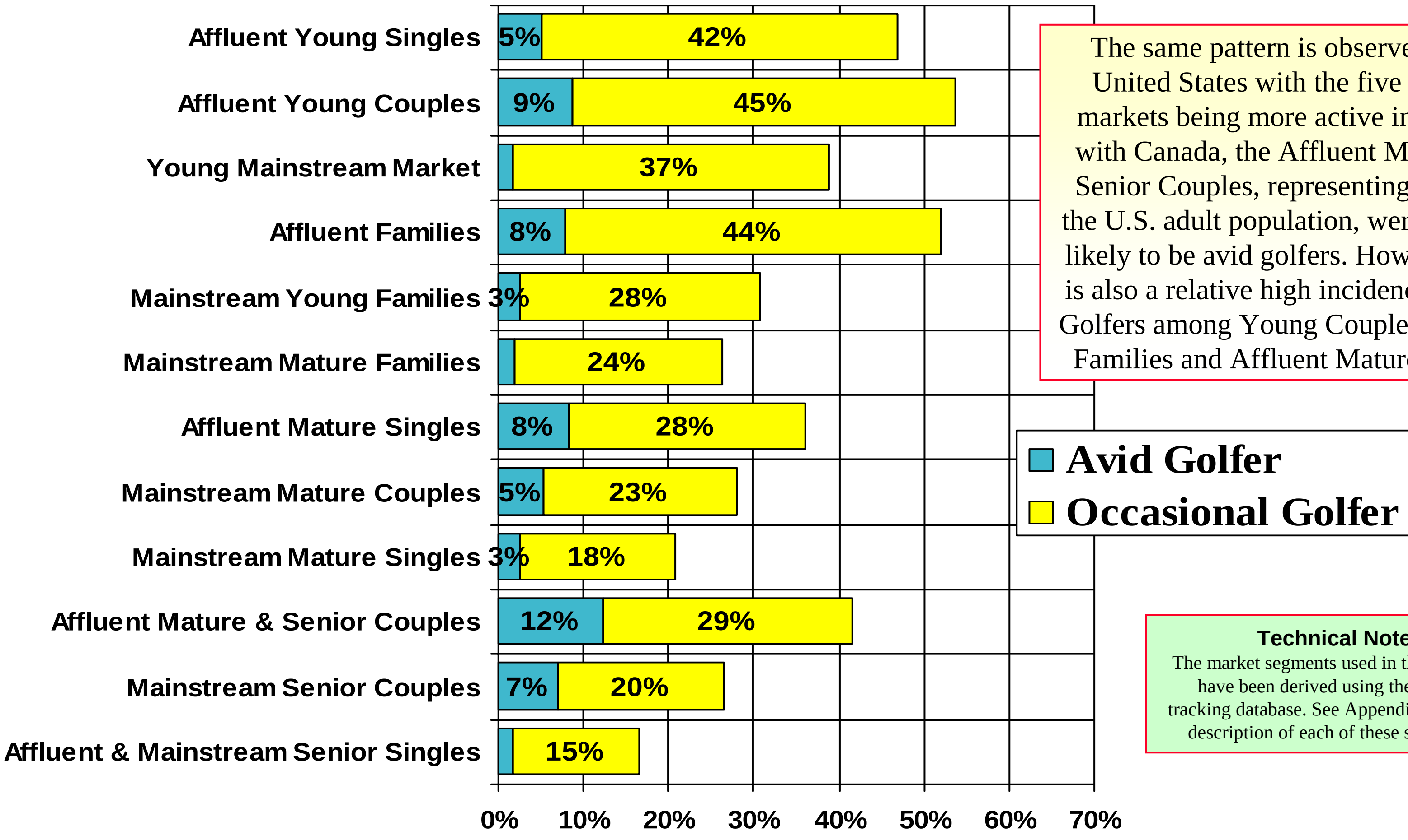
The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.

Interest in Golf

United States:By Market Segment

Based on Day-to-Day and Past Vacation Activity

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The same pattern is observed in the United States with the five affluent markets being more active in golf. As with Canada, the Affluent Mature and Senior Couples, representing 5.4 % of the U.S. adult population, were the most likely to be avid golfers. However there is also a relative high incidence of Avid Golfers among Young Couples, Affluent Families and Affluent Mature Singles.

Technical Note

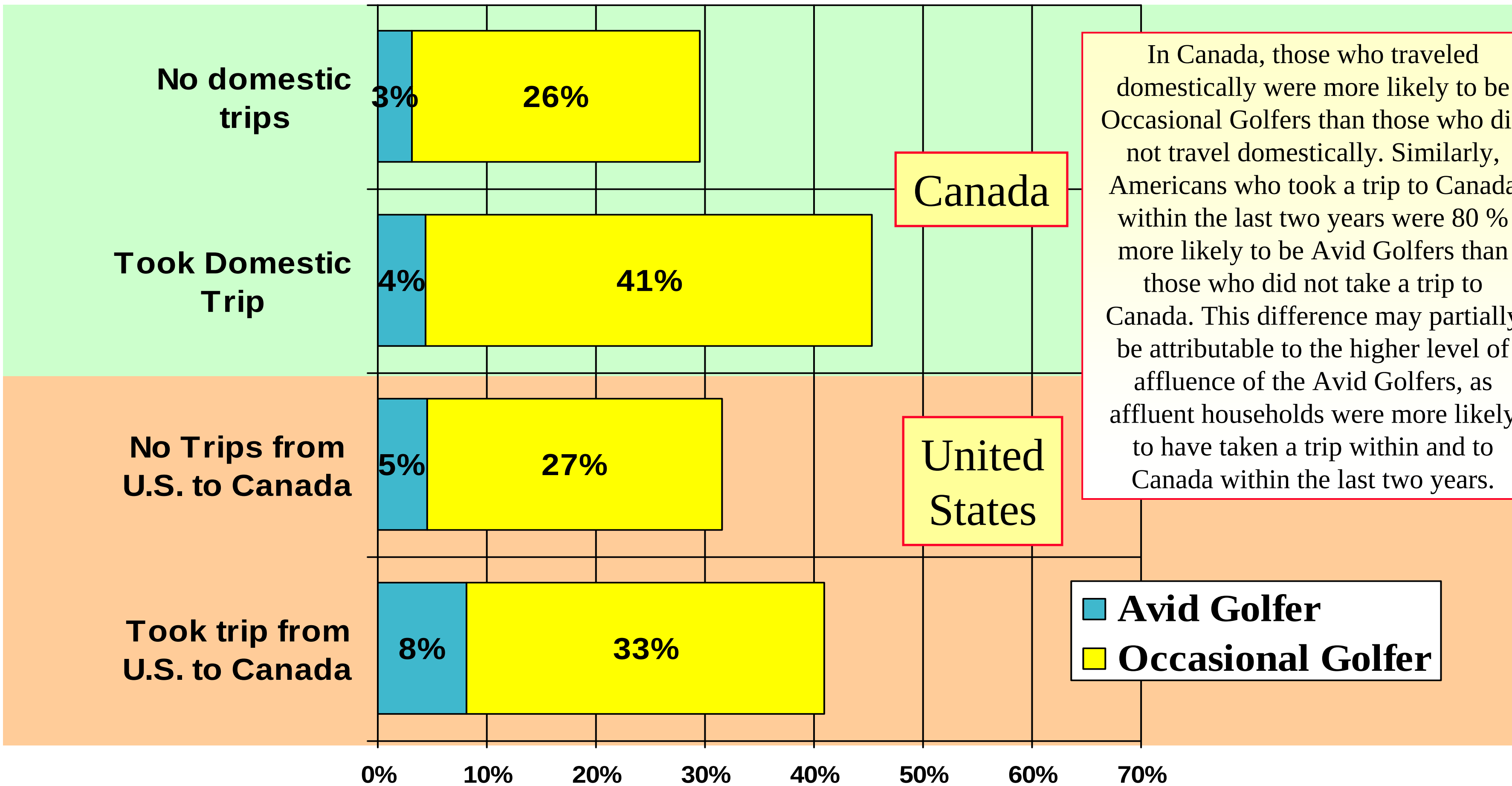
The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.

Interest in Golf

Canada vs. U.S.: By Trips In Canada Last 2 Years

Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



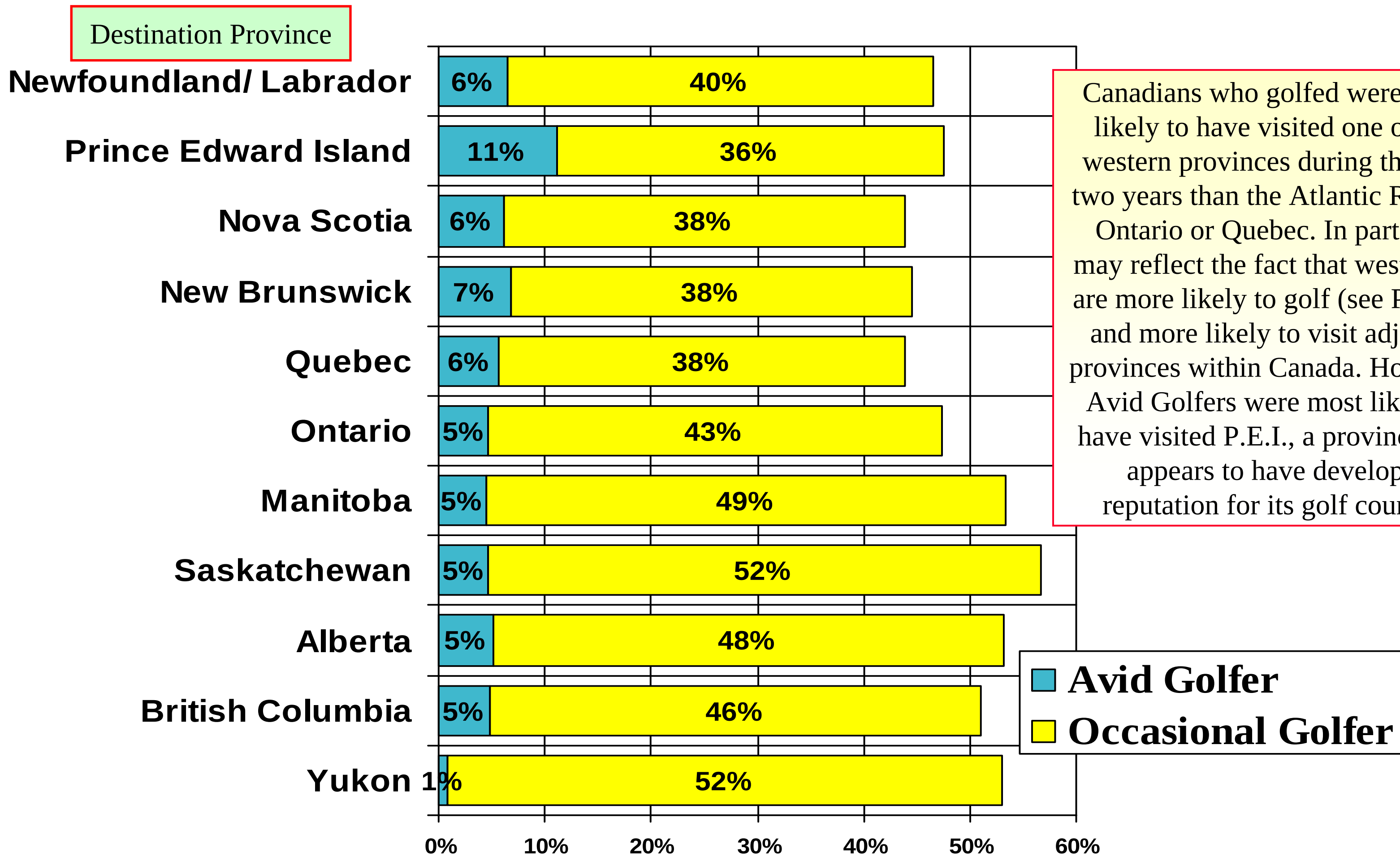
In Canada, those who traveled domestically were more likely to be Occasional Golfers than those who did not travel domestically. Similarly, Americans who took a trip to Canada within the last two years were 80 % more likely to be Avid Golfers than those who did not take a trip to Canada. This difference may partially be attributable to the higher level of affluence of the Avid Golfers, as affluent households were more likely to have taken a trip within and to Canada within the last two years.

Interest in Golf

Canada: Interest By Province Traveled To

Base: Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Took At Trip to Each Province During the Last 2 Years



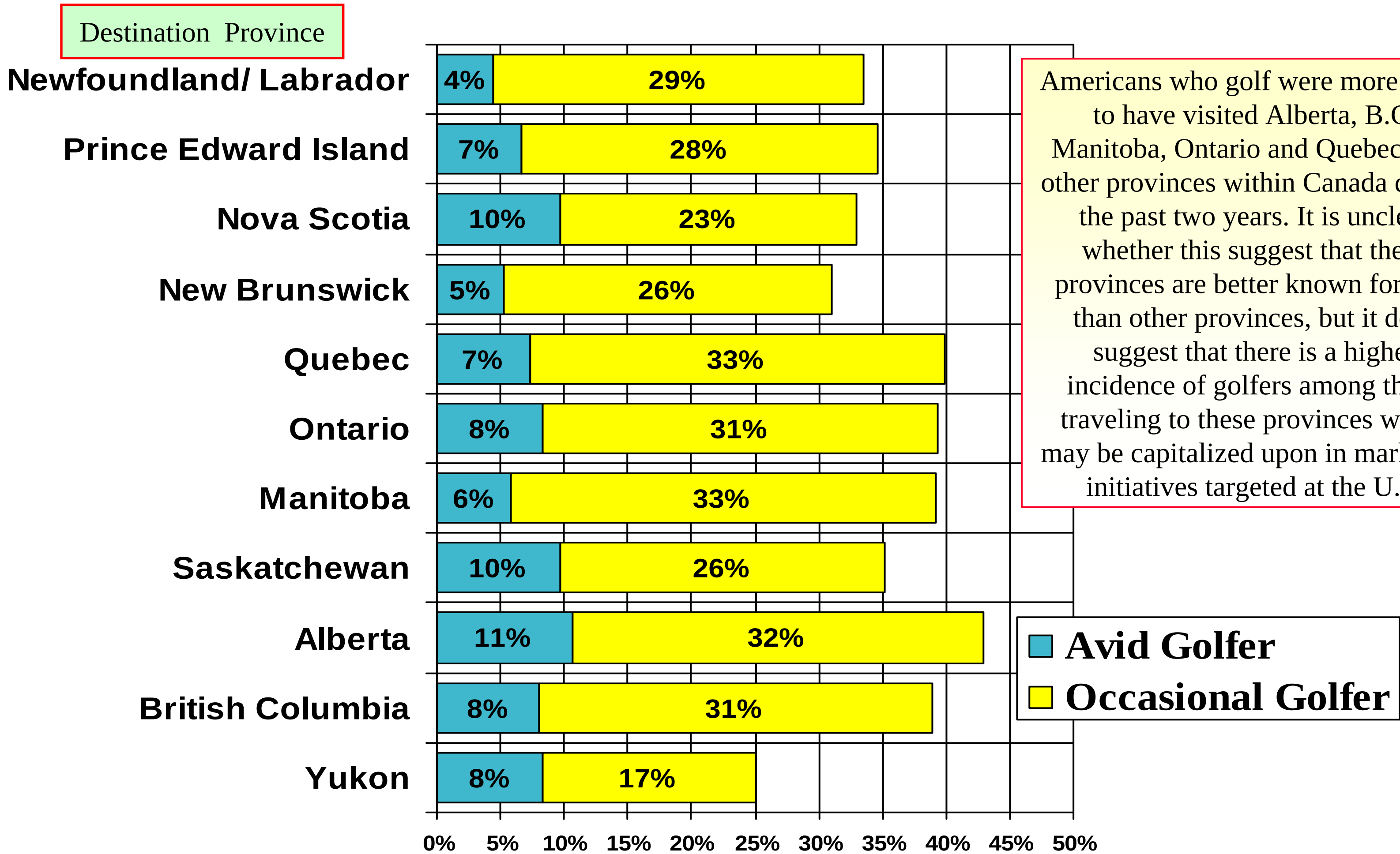
Canadians who golfed were more likely to have visited one of the western provinces during the past two years than the Atlantic Region, Ontario or Quebec. In part, this may reflect the fact that westerners are more likely to golf (see Page 4) and more likely to visit adjacent provinces within Canada. However, Avid Golfers were most likely to have visited P.E.I., a province that appears to have develop a reputation for its golf courses.

Interest in Golf

United States: Interest By Province Traveled To

Base: Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Took At Trip to Each Province During the Last 2 Years



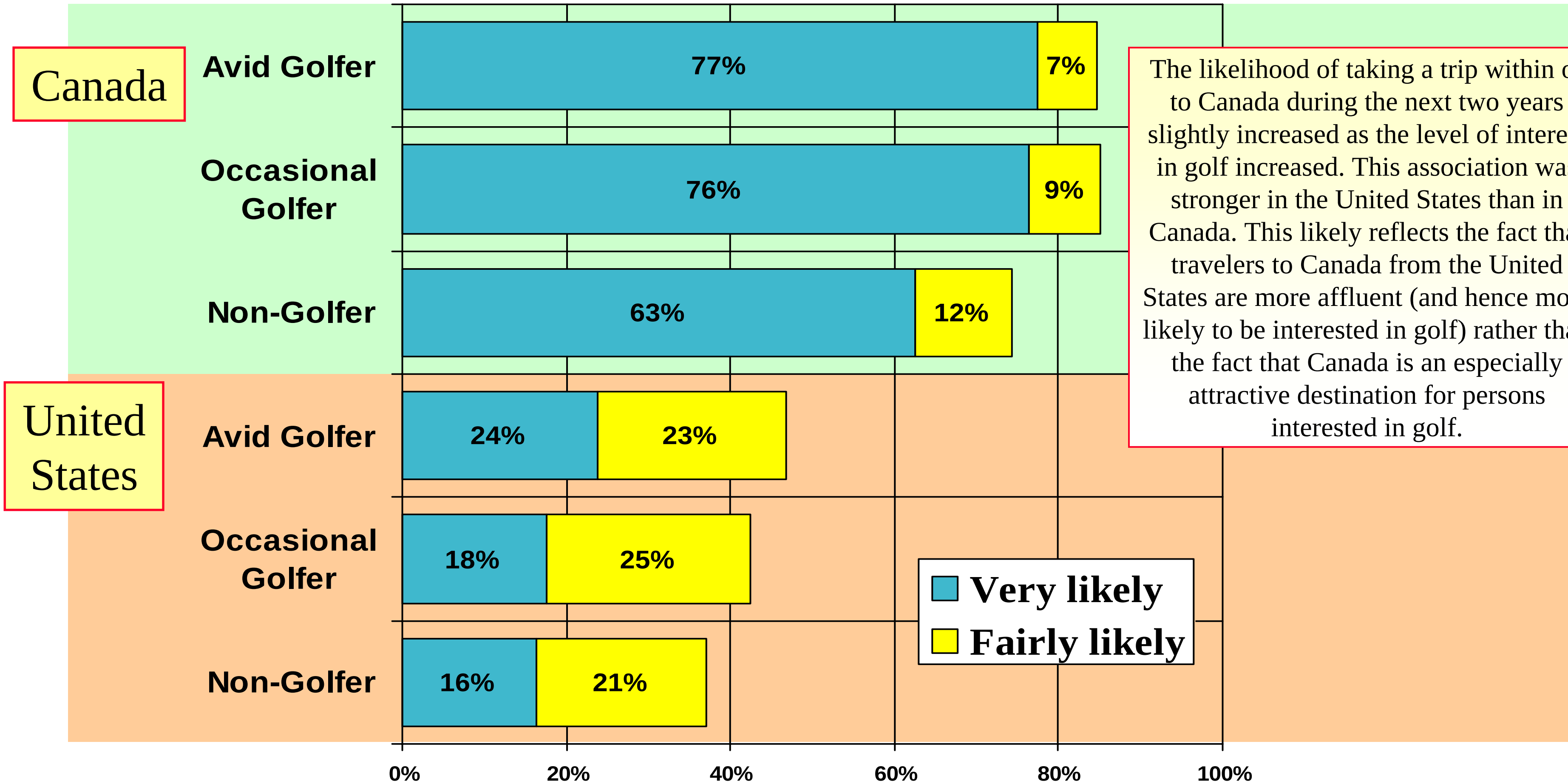
Americans who golf were more likely to have visited Alberta, B.C. Manitoba, Ontario and Quebec than other provinces within Canada during the past two years. It is unclear whether this suggest that these provinces are better known for golf than other provinces, but it does suggest that there is a higher incidence of golfers among those traveling to these provinces which may be capitalized upon in marketing initiatives targeted at the U.S.

Interest in Golf

Intentions to Travel to Canada Next Two 2 Years

Interest in Golf By Intentions to Travel In Canada During Next 2 Years

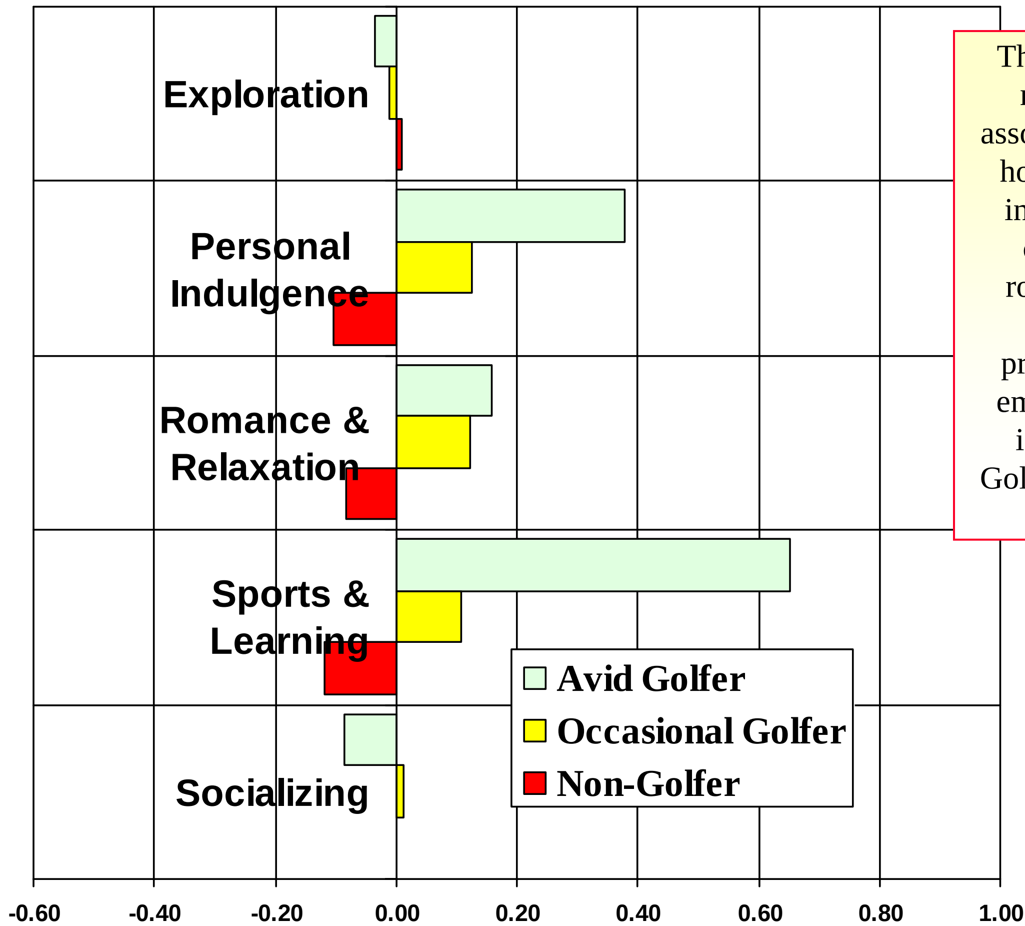
Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The likelihood of taking a trip within or to Canada during the next two years slightly increased as the level of interest in golf increased. This association was stronger in the United States than in Canada. This likely reflects the fact that travelers to Canada from the United States are more affluent (and hence more likely to be interested in golf) rather than the fact that Canada is an especially attractive destination for persons interested in golf.

General Vacation Experiences Sought During Pleasure Travel in the Past 2 Years By Interest in Golf

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



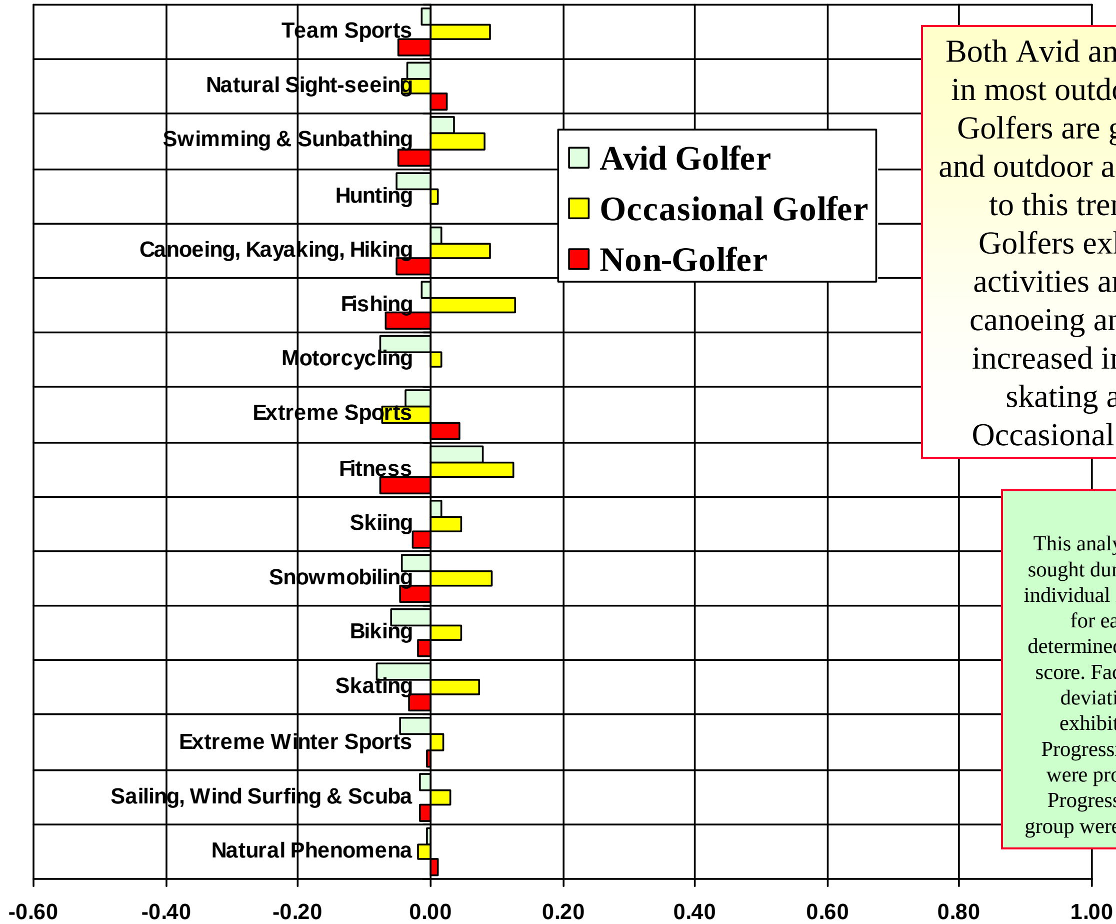
Those who exhibit an interest in golf were considerably more likely to have sought out vacation experiences associated with sports and learning (i.e., to participate in a hobby or sport) but are also quite interested in personal indulgence (e.g., to experience the good life, visiting a casino, experiencing city life such as night life) and romance and relaxation (e.g., experience intimacy and romance, relax and recuperate). Advertising and promotional materials designed to promote golf should emphasize the opportunities for entertainment, personal indulgence and relaxation offered by the destination. Golfers appear less interested in exploration or socializing with family and friends than non-golfers

Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past 2 Years By Interest in Golf

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Both Avid and Occasional Golfers tend to be more interested in most outdoor activities than Non-Golfers. However, Avid Golfers are generally less interested in other types of sports and outdoor activities than Occasional Golfers. One exception to this trend is noted for Fitness Activities. Occasional Golfers exhibit interest in a very broad range of outdoor activities and especially team sports, fishing, fitness, and canoeing and kayaking. Occasional Golfers also manifest increased interest in winter sports such as snowmobiling, skating and downhill skiing/snowboarding. Clearly, Occasional Golfers value an eclectic outdoor experience.

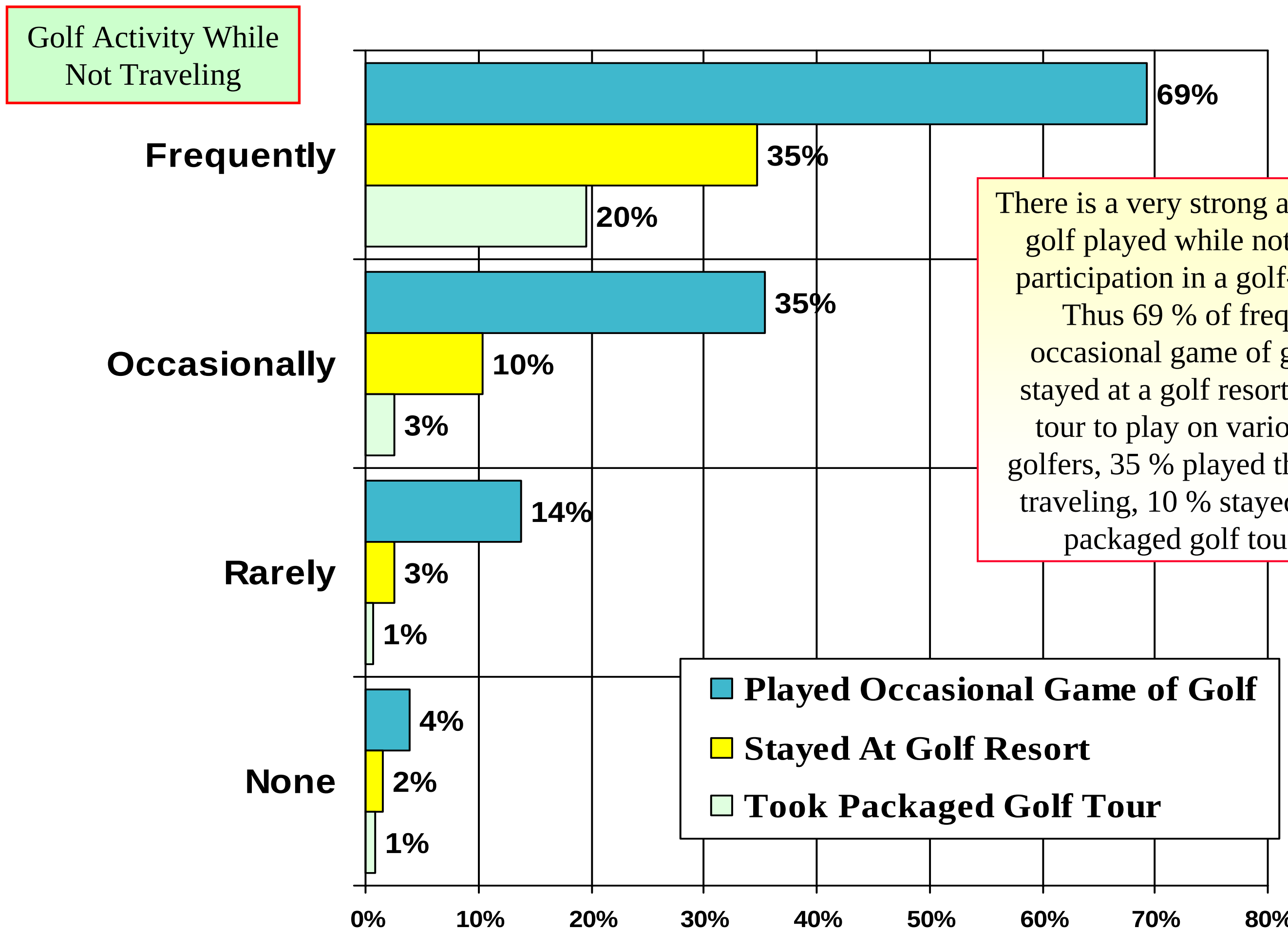
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of “0” and a standard deviation of “1”. A value of “0” means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.

Interest in Golf

Day-to-Day Golf Activity and Golf Activity While Traveling

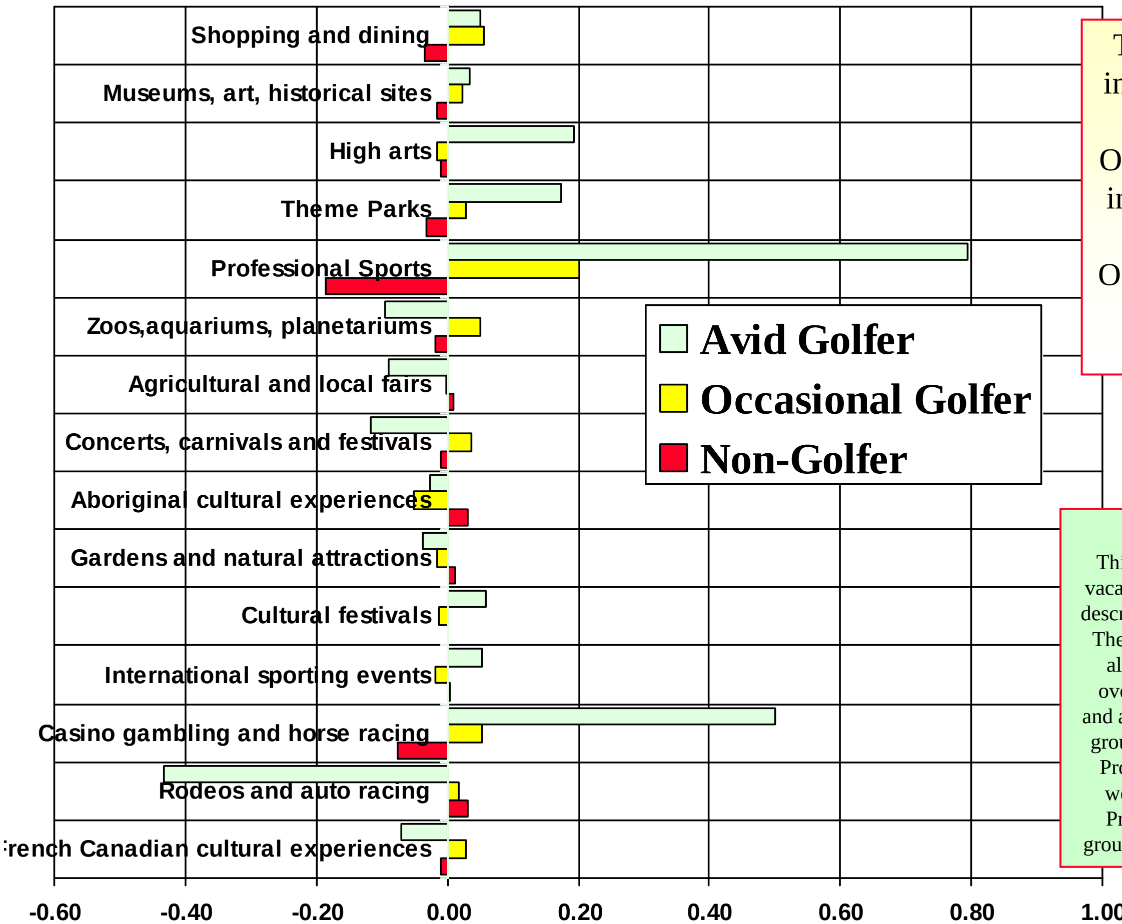
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



There is a very strong association between the amount of golf played while not traveling and the likelihood of participation in a golf-related activity while traveling. Thus 69 % of frequent golfers have played the occasional game of golf while traveling, 35 % have stayed at a golf resort and 14 % took a packaged golf tour to play on various courses. Among occasional golfers, 35 % played the occasional game of golf while traveling, 10 % stayed at a golf resort and 3 % took a packaged golf tour to play on various courses.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past 2 Years By Interest in Golf

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



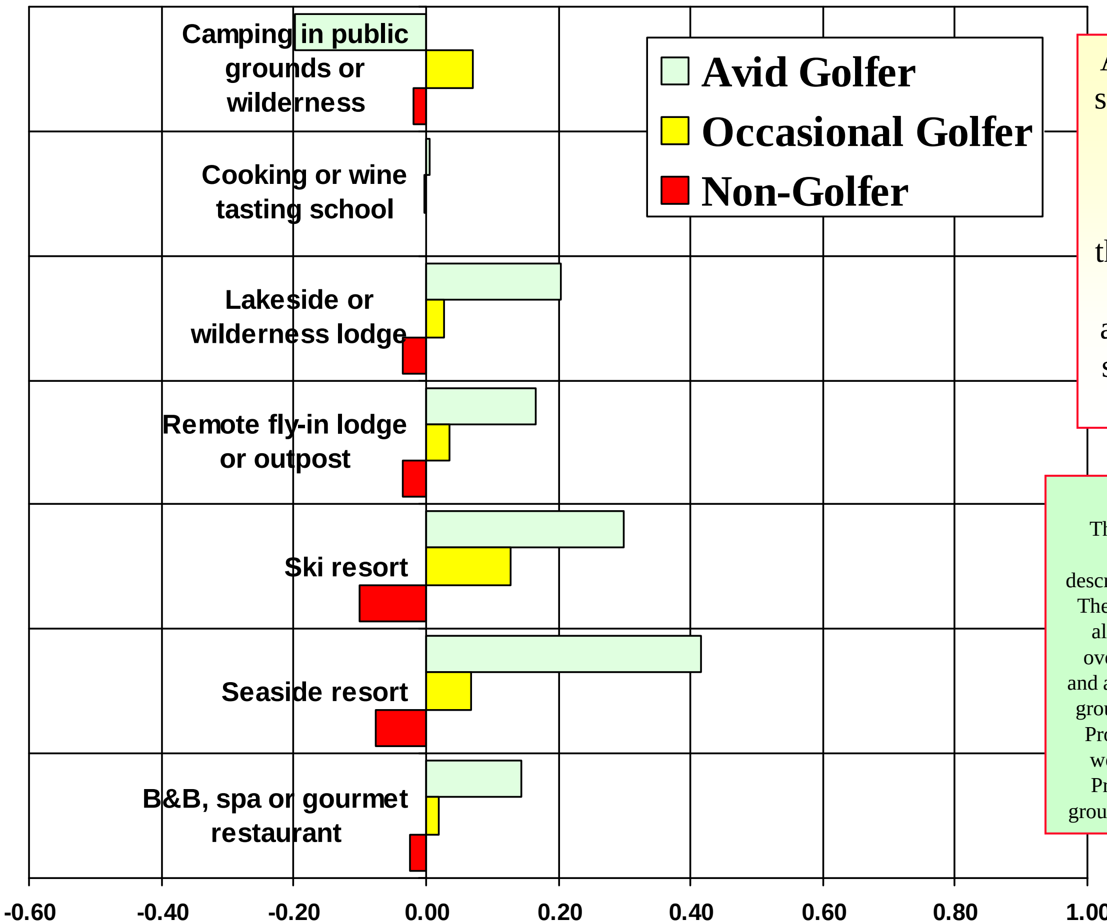
There is a stronger association between an avid interest in golf and interest in professional sports and casino gambling and horse racing. Occasional Golfers also exhibit an above average interest in professional sports. However, beyond this, there is little difference between Avid, Occasional and Non-Golfers in terms of the types of cultural and entertainment activities sought over the course of the last two years of travel.

Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of “0” and a standard deviation of “1”. A value of “0” means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.

Accommodation-Related Activities Sought During Pleasure Travel in the Past 2 Years By Interest in Golf

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



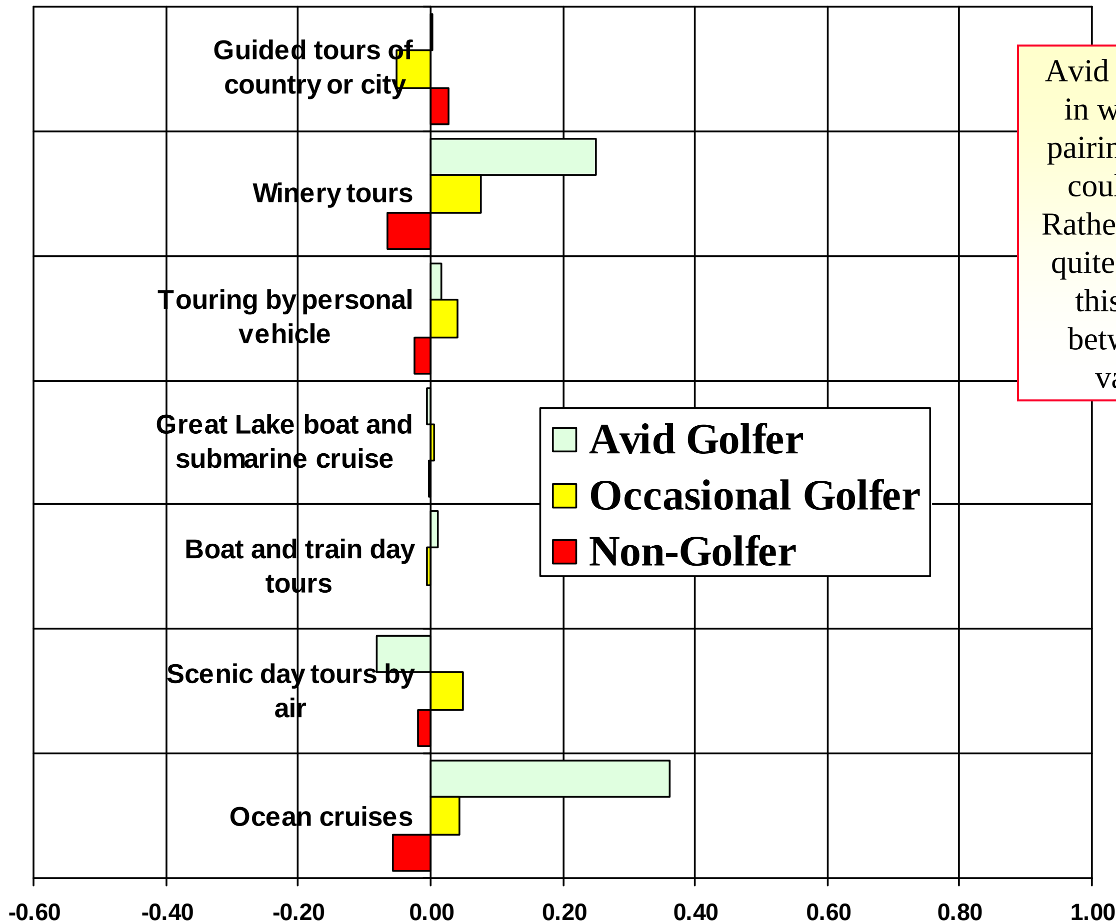
Avid Golfers were more likely to have stayed in a seaside resort, a ski resort, a remote fly-in lodge or lakeside wilderness lodge or a B&B, spa or gourmet restaurant with accommodations than Occasional or Non-Golfers. On the other hand, they are much less likely to have camped in public campgrounds. In part, this reflects the relative affluence of Avid Golfers. Occasional Golfers are somewhat more likely than Non-Golfers to camp, stay at a seaside resort or a ski resort.

Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past 2 Years By Interest in Golf

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



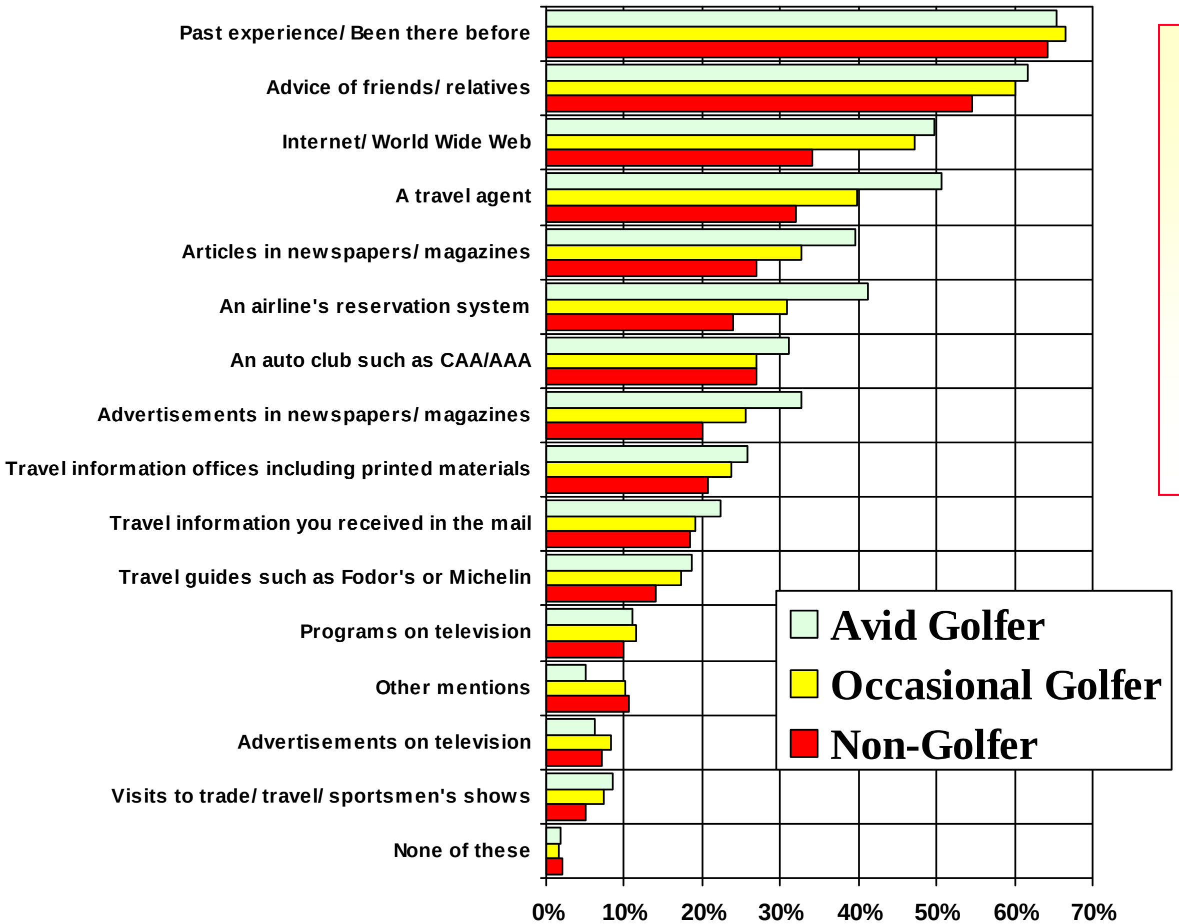
Avid Golfers exhibit considerable interest in wine tours and this may suggest that pairing wine tours with a golfing package could be quite effective for this group. Rather interestingly, Avid Golfers are also quite interested in ocean cruises. Beyond this, there are only weak associations between interest in golf and interest in various types of touring activities.

Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of “0” and a standard deviation of “1”. A value of “0” means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.

Sources of Information Consulted to Plan Brief Vacations By Interest in Golf

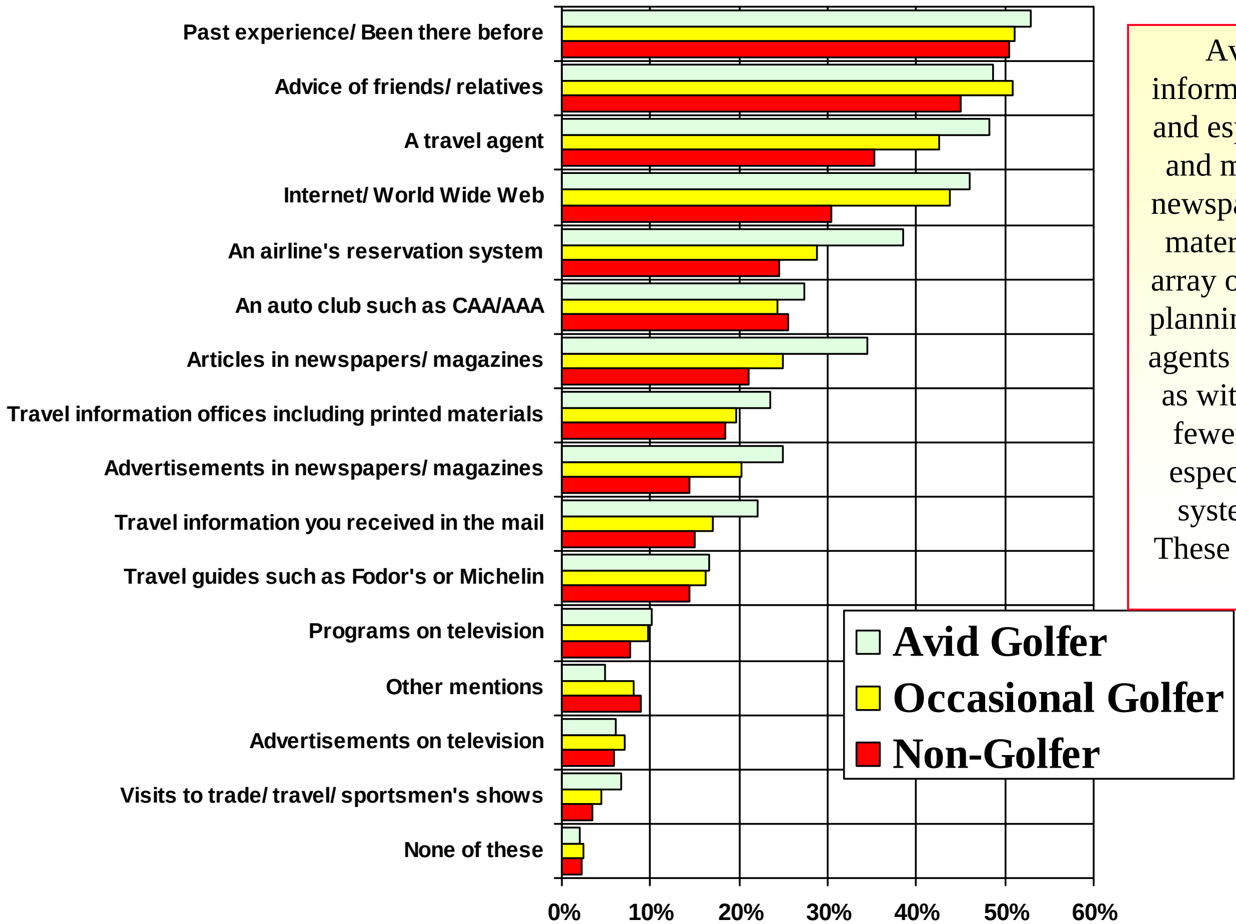
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Avid Golfers consult a larger variety of information sources when planning their brief vacations and especially travel agents, the Internet, newspaper and magazine articles, airline reservation systems and newspaper and magazine advertising. Occasional Golfers also consult a larger array of information sources than Non-Golfers when planning brief vacations, but fewer information sources than Avid Golfers. Once again, this pattern is partially attributable to the relative affluence of Avid and Occasional Golfers.

Sources of Information Consulted to Plan Longer Vacations By Interest in Golf

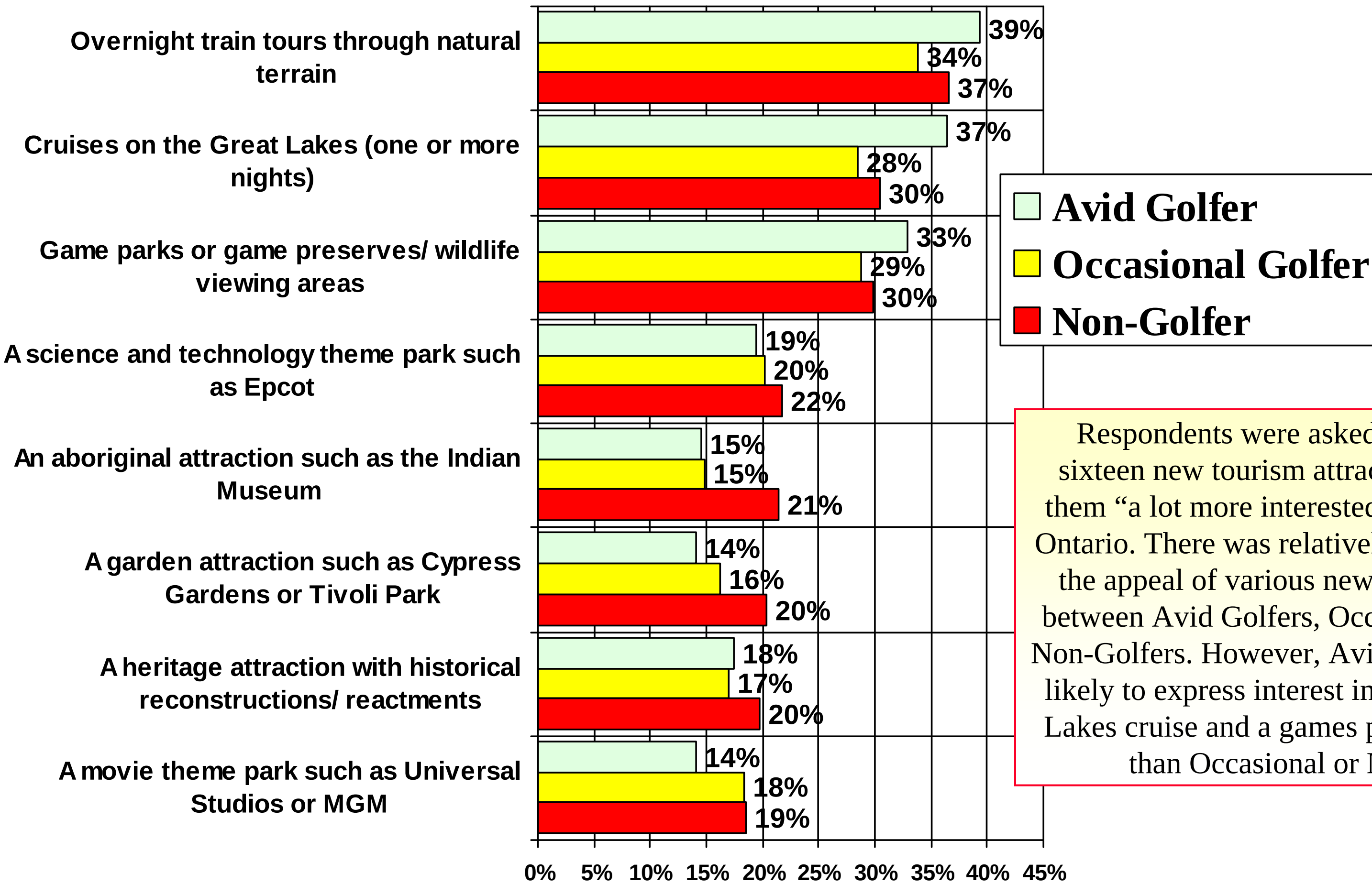
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Avid Golfers also consult a larger variety of information sources when planning longer vacations and especially travel agents, the Internet, newspaper and magazine articles, airline reservation systems, newspaper and magazine advertising and direct mail materials. Occasional Golfers also consult a larger array of information sources than Non-Golfers when planning longer vacations such as the Internet, travel agents and newspaper and magazine advertising. But as with brief vacations, Occasional Golfers consult fewer information sources than Avid Golfers and especially are less likely to use airline reservation systems and articles in newspaper or magazines. These patterns again reflect the relative affluence of Avid and Occasional Golfers.

Interest in New Tourism Products
By Interest in Golf (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

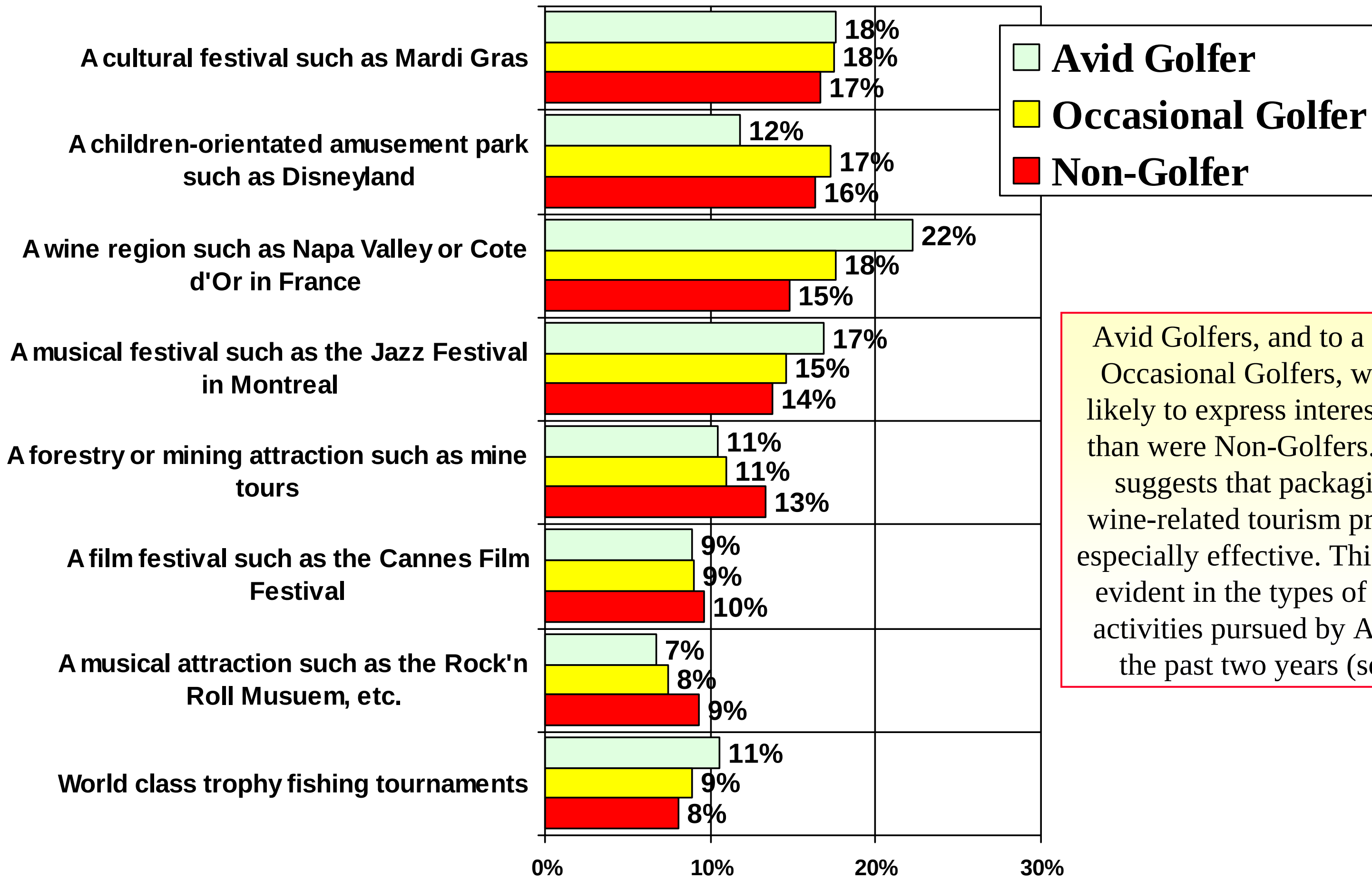


Respondents were asked whether each of sixteen new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. There was relatively little difference in the appeal of various new tourism attraction between Avid Golfers, Occasional Golfers and Non-Golfers. However, Avid Golfers were more likely to express interest in an overnight Great Lakes cruise and a games park/ game preserve than Occasional or Non-Golfers.

Interest in New Tourism Products By Interest in Golf (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Avid Golfers, and to a certain extent, Occasional Golfers, were also more likely to express interest in wine tours than were Non-Golfers. This outcome suggests that packaging golf with wine-related tourism products may be especially effective. This pattern is also evident in the types of entertainment activities pursued by Avid Golfers in the past two years (see Page 18).

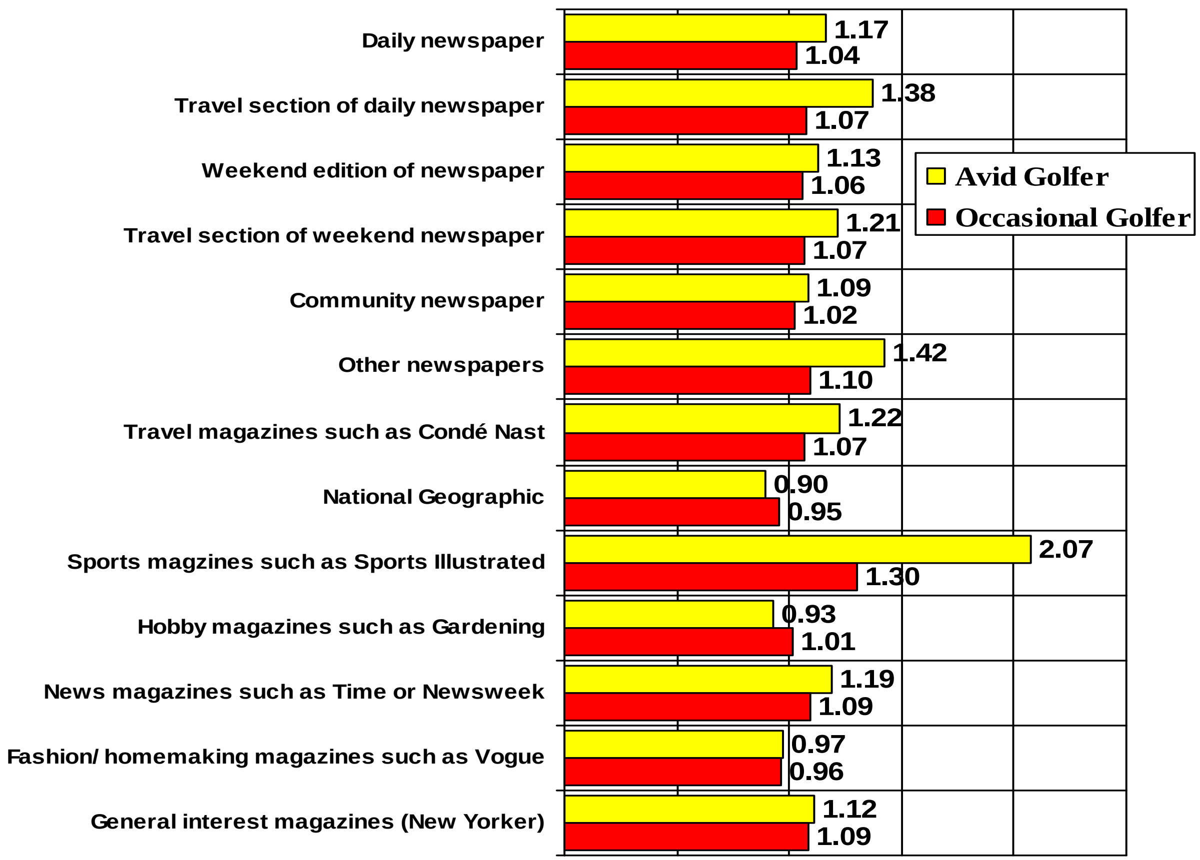
Media Index for Print Media: Canada & United States

By Interest in Golf

Percent Reading Each Publication Type Among Those With An Interest in Golf

By Percent Reading Each Type of Publication in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that sports magazines and the travel section of the daily newspaper are the most efficient methods by which to reach Avid Golfers. Occasional Golfers are also more likely to read sports magazines relative to the general population, but less so than Avid Golfers.

Technical Note

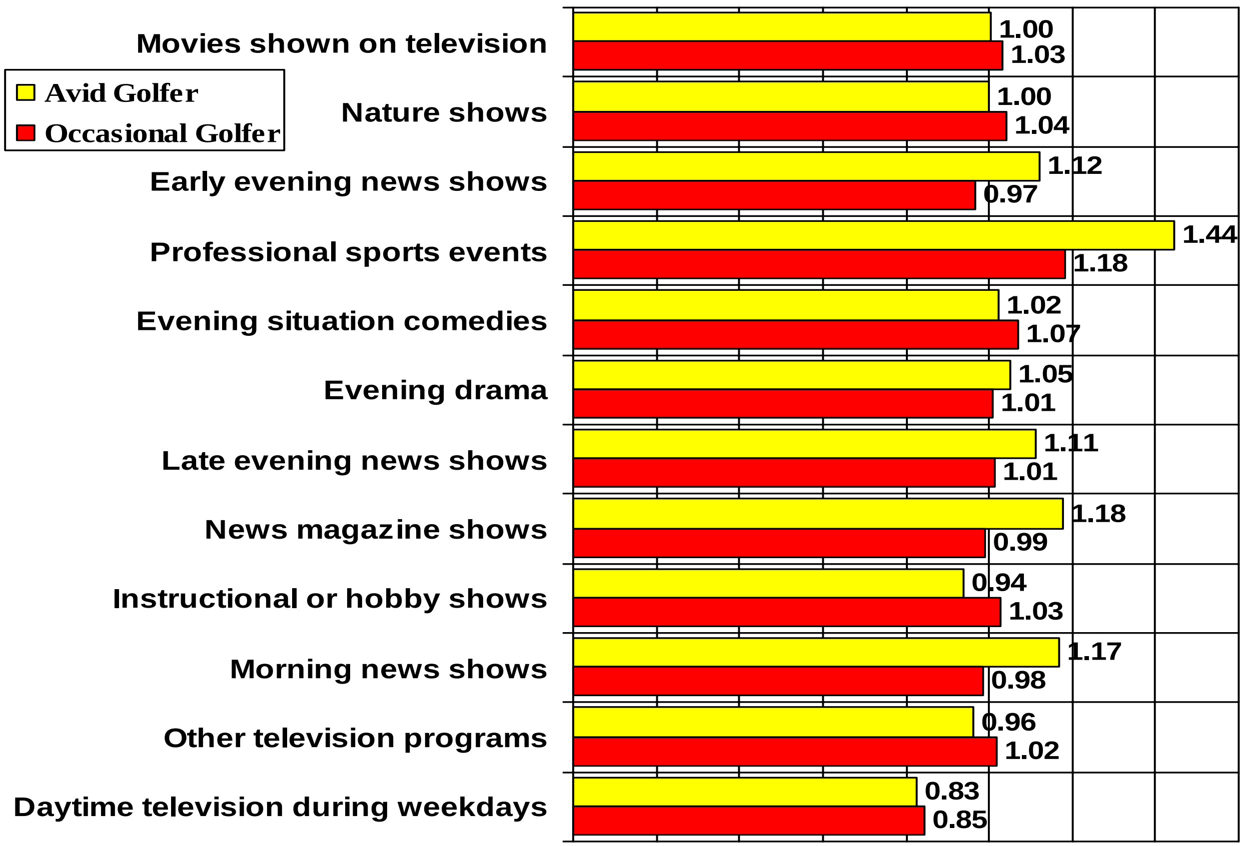
The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in Golf were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programs: Canada & United States

By Interest in Golf

Percent Watching Each Type of Television Program Among Those With An Interest in Golf By Percent Watching Each Program Type in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Avid Golfers, and to a certain extent Occasional Golfers, are more likely to watch professional sports events on television than Non-Golfers suggesting that this may be an effective type of programming to reach this target market. Avid Golfers are also more likely to watch news programming (e.g., Early Evening News, Late Evening News, Morning News Shows).

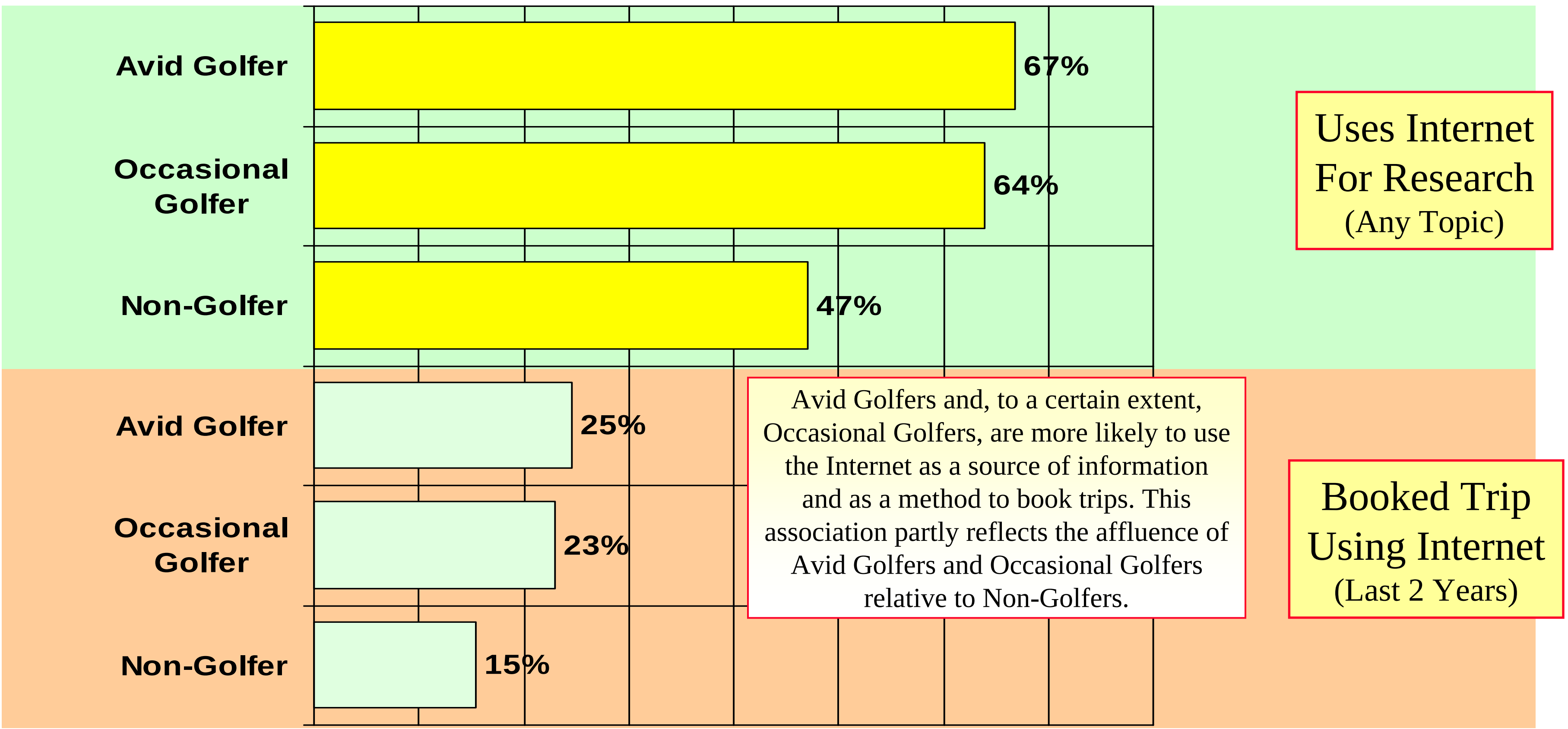
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in Golf were 20 % more likely to read a particular publication than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet

By Interest in Golf

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Avid Golfers and, to a certain extent, Occasional Golfers, are more likely to use the Internet as a source of information and as a method to book trips. This association partly reflects the affluence of Avid Golfers and Occasional Golfers relative to Non-Golfers.

Destination Image Mapping

- Technical Explanation -

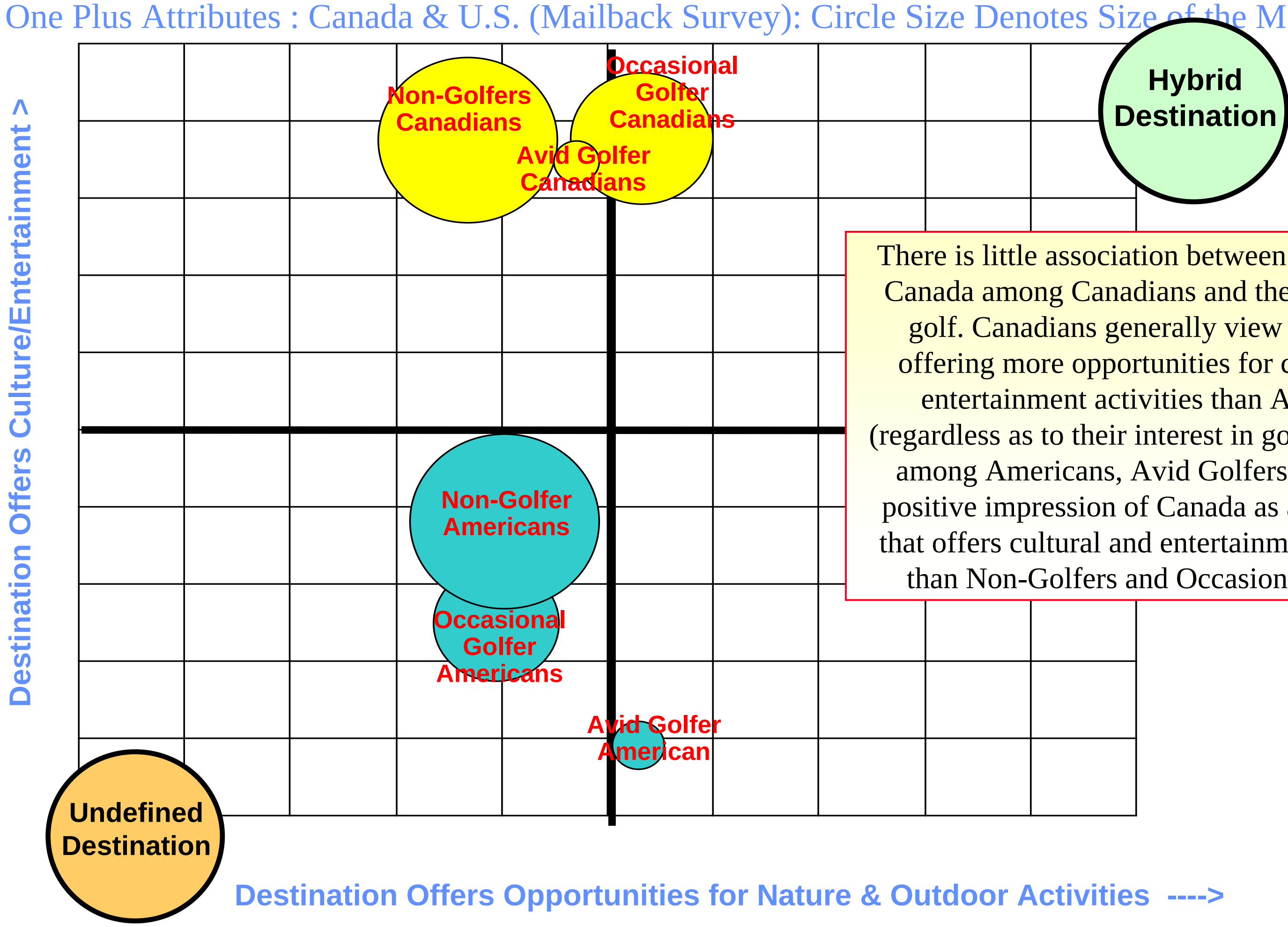
Respondents were asked to assess the image of Canada and Ontario on a ten point rating scale for 25 image attributes. These ratings were factor analyzed to identify to general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellence opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

Canada and United States

Canadian Vacation Imagery

By Interest in Golf

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Canada On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market



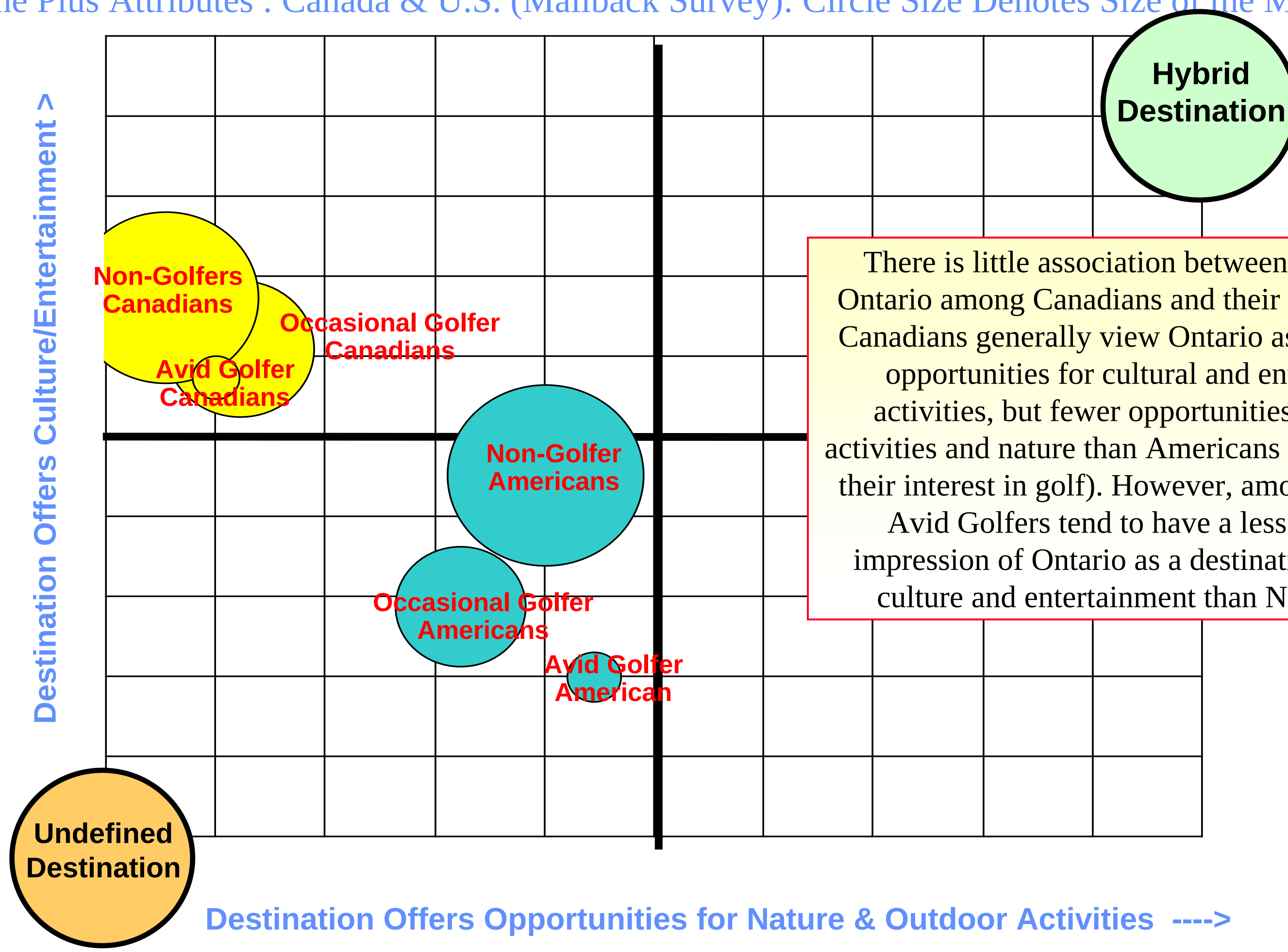
There is little association between the image of Canada among Canadians and their interest in golf. Canadians generally view Canada as offering more opportunities for cultural and entertainment activities than Americans (regardless as to their interest in golf). However, among Americans, Avid Golfers have a less positive impression of Canada as a destination that offers cultural and entertainment activities than Non-Golfers and Occasional Golfers.

Canada and United States

Ontario Vacation Imagery

By Interest in Golf

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Ontario On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market



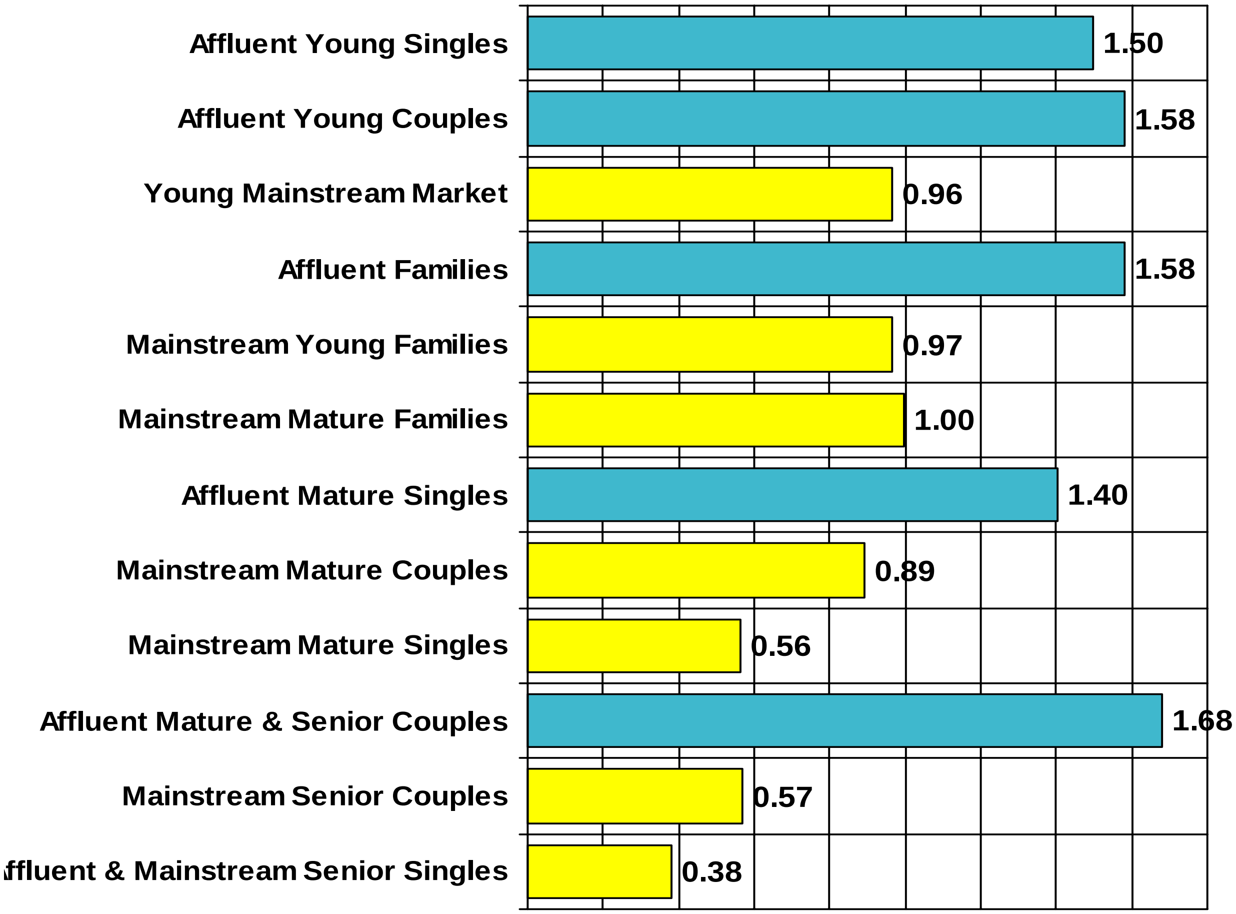
There is little association between the image of Ontario among Canadians and their interest in golf. Canadians generally view Ontario as offering more opportunities for cultural and entertainment activities, but fewer opportunities for outdoor activities and nature than Americans (regardless as to their interest in golf). However, among Americans, Avid Golfers tend to have a less favourable impression of Ontario as a destination that offers culture and entertainment than Non-Golfers .

Overall Market Potential

Interest in Golf:Canada

Interest in Golf By Likelihood of Travel Within Canada (Indexed)

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The Overall Market Potential Index is constructed to identify those segments which are most likely to be responsive to marketing, advertising and promotional initiatives designed to promote golf related vacation activities. This Index indicates that in Canada the five affluent segments (i.e., Affluent Young Singles, Affluent Young Couples, Affluent Families, Affluent Mature Couples, Affluent Mature and Senior Couples) are the most likely to be responsive to such initiatives. There is little difference in the market potential of these five segments. Overall, these five segments represent 24.5 % of the Canadian travelers.

Technical Note

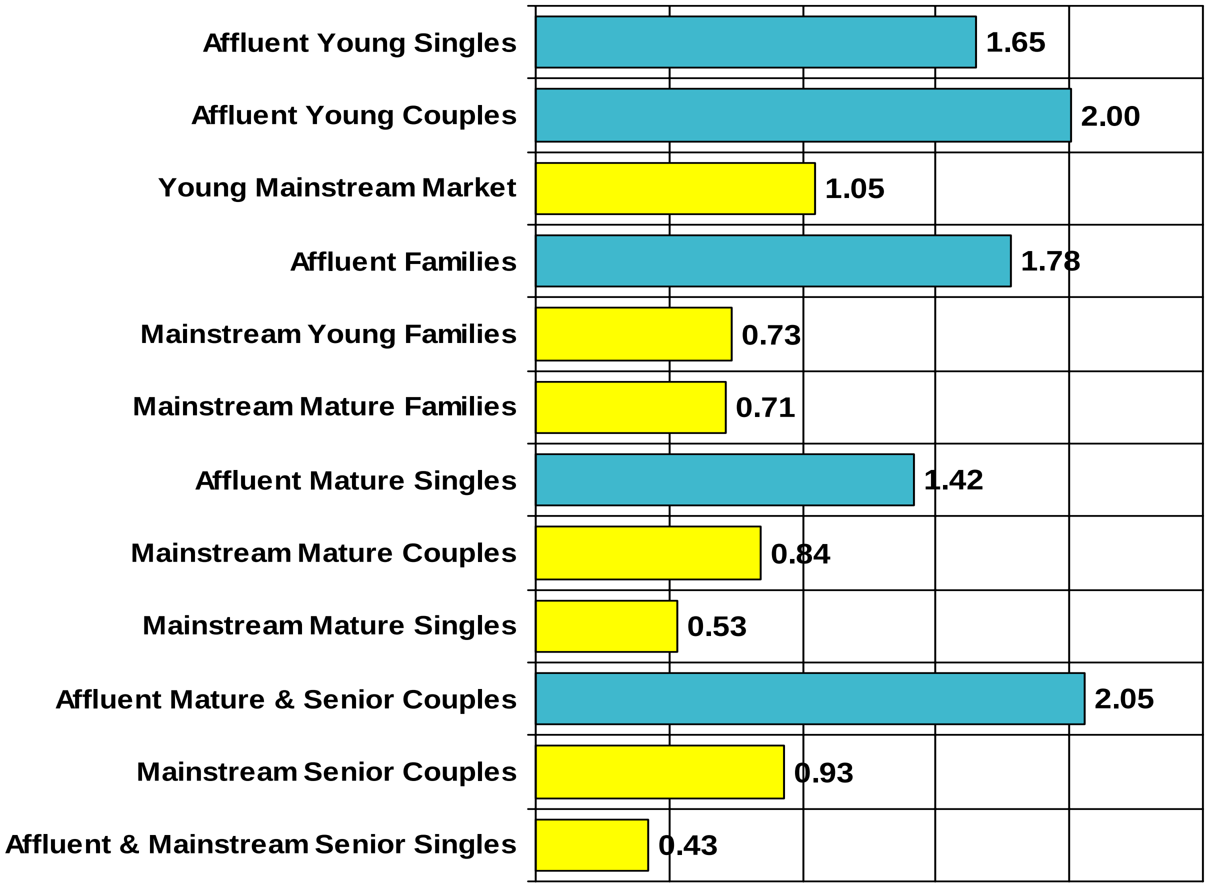
The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in Golf related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.

Overall Market Potential

Interest in Golf:United States

Interest in Golf By Likelihood of Travel To Canada (Indexed)

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The Overall Market Potential Index for the United States shows the same pattern as that observed for Canada. However, in the United States, the Affluent Mature and Senior Couples and the Affluent Young Couples are the more likely to be responsive to such initiatives than other affluent segments. These two segments represent 9.0 % of the U.S. travelers.

Technical Note

The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in Golf related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.