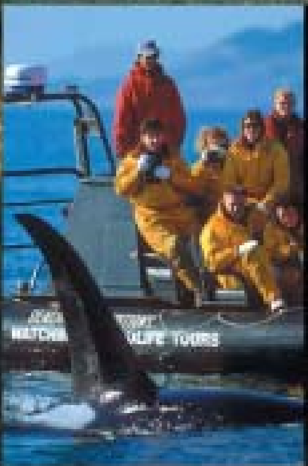
International Adventure Travel and Outdoor Sports Show 2003

Outdoor Enthusiast Survey



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Canadian Tourism Commission
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Canada

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Table of Contents

1. Introduction

The IATOS Expo (International Adventure Travel and Outdoor Sports Show, Chicago, February 2003) provided the CTC's Outdoor Product Development group with the opportunity to survey[1] the show's outdoor enthusiast attendees. While International in its name, and with an international roster of exhibitors, the respondents were predominantly from the state of Illinois.[2] Results can therefore not be generalized to the entire American outdoor enthusiast population but rather, can provide a base of information for one market of outdoor enthusiasts.

These outdoor enthusiasts provided useful information on their past experiences and familiarity with Canada; their activity levels, activity interests, travel behaviours, and their interest in Canada as a future outdoors destination. Certain findings emerged that can add to existing knowledge of this key market segment and that can further tailor CTC's research efforts with respect to this group.

Key findings that resulted from this study include:

- Very few respondents had negative interest (no intention to travel to Canada in the next two years) but about a third (31%) were undecided. These 'undecided' travellers were less aware of Canadian destinations and less positive about Canada in general. This suggests that a substantial portion of the population require more information and incentives in order to be convinced to spend their vacation time in Canada.
- Travellers on the whole expressed more of an interest in learning about the nature, culture and the environment of the destinations that they visited than in engaging in more physically rigorous activities.
- Respondents who were classified in the 'high activity'[3] level category were more likely to have travelled to Canada in the past. Travellers who had visited Canada in the past were also more likely to express an interest in learning while on their holidays. More travellers than not prefer to exercise themselves both physically and mentally while travelling.
- Only half of respondents perceive Canada as a destination offering good value (even fewer among those who are undecided as to future travel to Canada). Awareness of Canada's positive attributes, other than 'scenic' and 'friendly' (which were highly rated by all travellers) need to be elevated in order to convince travellers that Canada is worthy of a visit.

[1] Please see Notes at the end of the report for methodology and study limitations.

[2] 81% of respondents were from the state of Illinois, 13% from neighbouring states and the small remainder were dispersed.

[3] An index for activity level (based on responses to the questionnaire) was created; 40% of respondents were classified as having high activity levels, 31% as having medium activity levels and 29% as having low activity levels.

2. Past and Future Outdoor/Adventure Travel to Canada

Past Travel to Canada

Sixty-two per cent of respondents had visited Canada in the past specifically for outdoor adventure activities. Numbers were somewhat higher when asked simply if they had visited Canada in the past 5 years (not *specifically* for outdoor/adventure). More travellers had visited urban areas than had visited rural/wilderness areas. Those who had never visited Canada were more likely to be undecided/negative as to future interest, whereas those who had visited parts of Canada on multiple occasions were more likely to have interest in visiting in the future.

Of all the regions surveyed, only the US outranked Canada as a destination that had been travelled to in the past specifically for outdoor/adventure activities (Europe, for instance, was behind Canada at 46%).

Males were more likely to have visited Canada than females.

Respondents who indicated that they had been to Canada for outdoor/adventure travel in the past were more likely than average to have high activity levels (69% vs. 40% average). Half (52%) of those with no past outdoor/adventure travel to Canada were likely to be classified as ‘low-activity-level’ travellers – substantially higher than the 38% average.

Future Travel to Canada

Sixty-six percent of respondents had ‘positive interest’ in visiting Canada in the future. That is to say that 19% indicated that they would ‘definitely’ travel to Canada for outdoor adventure activities in the next two years and 47% would ‘probably’ travel to Canada. While only 2% of respondents would definitely or probably not travel to Canada, a substantial 31% of respondents were undecided.

These levels of likelihood for travel to Canada were more positive than for any other region surveyed (with the exception of the USA).

Respondents who expressed interest in visiting Canada over the next two years were more likely to have travelled to Canada and were more likely to be classified as having high or medium activity levels.

3. Familiarity and Interest in Canadian destinations

Not surprisingly, respondents were most familiar with Canada's three largest provinces: Ontario, Quebec and British Columbia. Those who were undecided on whether they would travel to Canada in the future were less familiar with all provinces.

Among those who had visited Canada in the past, they were most likely to have visited Ontario followed by Quebec, British Columbia and Alberta.

Travellers were most interested in visiting British Columbia, followed by Newfoundland and Labrador, Quebec, Ontario, Nova Scotia, PEI, Alberta and the Yukon. Those who had travelled in Canada before were particularly likely to express interest in the Atlantic Provinces while those who had never visited Canada for outdoor/adventure activities were more interested in Western Canada.

It must be noted that interest in certain regions of Canada may have been elevated due to exposure from these destinations at the IATOS Expo. *Please see Appendix for details on familiarity and interest in all provinces and territories.*

Half of the sample had visited urban areas of Canada more than 3 times in the past, and 4-in-10 had visited rural or wilderness areas in the past with the same frequency. Among those who expressed positive interest in visiting Canada in the future for outdoor adventure travel, these figures were approximately 10% higher. Overall frequency of visiting any region (urban or wilderness) of Canada was directly proportional to age.

4. Images of Canada

'Scenic' and 'Friendly' were the top two attributes that respondents chose for Canada from a list of possible positive and negative attributes (selected by 82% and 78% of respondents, respectively). 'Adventurous' and 'Safe' were also chosen by almost two thirds of respondents. About half thought of Canada as 'hospitable' and as a destination with 'good value' – indicating that these characteristics could use some image boosting.

Almost half of respondents thought of Canada as 'rugged' (more than half among 20-40 year olds. Just over a quarter thought of Canada as 'cold' and 'remote'. Older travellers' impressions with respect to Canada's safety, good value and hospitable nature were more positive than younger travellers' impressions.

Younger travellers (who overall tended to have less travel experience to Canada) were more likely to think of Canada as 'cold' (46% of 20 to 29 year olds rated 'cold' as a key characteristic of Canada compared to 29% of all respondents).

Only 21% of respondents thought of Canada as 'distinctive' – however travellers aged 50+ were more likely to call Canada distinctive (31%); 5% thought of Canada as 'dangerous' and 12% as 'homey.'

Travellers with past outdoor/adventure travel to Canada experience generally rated Canada more favourably than those with no past experience, particularly on the following attributes: adventurous (69% vs. 59%), safe (65% vs. 53%), good value (58% vs. 34%) and hospitable (57% vs. 33%). They were also slightly more likely to say it was rugged, remote, distinctive and homey, and less likely to say it was cold. Travellers with and without past travel experience in Canada were about equally likely to rate it as scenic and friendly.

Those with positive interest in visiting Canada in the future for outdoor adventure travel were also likely to rate Canada more favourably than those who were undecided. Those who were undecided or who had negative interest in visiting Canada were more likely to identify ‘cold’ from the list of possible characteristics. Those who were ‘undecided’ were substantially less likely to rate Canada as adventurous (54% vs. 71%) or hospitable (37% vs. 54%) and they were also less likely to indicate good value as a characteristic.

Outdoor enthusiasts with high activity levels also rated Canada more favourably.

5. Types of Adventurers

When provided with a list of statements to describe the type of activities and travel that they enjoy, the most popular statement chosen indicated an enjoyment of learning while travelling (“I like to learn about nature, culture and the environment”). This statement was chosen more often than statements that were more ‘active’ in orientation (such as “I like to engage in sporting activities that challenge me or push my physical limits”). Older travellers and females, as well as travellers with past outdoor/adventure experience in Canada were particularly likely to indicate that this statement described them well. Travellers with positive interest in Canada were also somewhat more likely to express high interest in learning, as were travellers with higher activity levels. (This finding coincides with findings from the CTC’s Travel Activities and Motivation Survey analysis where 50% of American Hard Outdoor Adventure Enthusiasts and 41% of American Soft Outdoor Adventure Enthusiasts were also Heritage Tourism Enthusiasts.)

While the learning statement was the one that people most related to (65% said that it described them extremely well and 32% said it described them somewhat), other popular statements were:

- The activities I can do when I get there determine the destination.
  (49% extremely well, 46% somewhat)
- I like to combine urban and wilderness experiences when I travel.
  (48% extremely well, 37% somewhat)
- I like to engage in sporting activities that challenge me or push my physical limits.
  (38% extremely well, 50% somewhat) [4]

As would be expected, the older the traveller, the less likely they were to express interest in engaging ‘in sporting activities that challenge me or push my physical limits.’

[4] Other possible statements that were somewhat less popular than those mentioned in the text were: “I enjoy having all the arrangements made before I leave home;” “The reputation or image of the destination is extremely important to me;” “I believe in paying whatever it costs to get the best quality.”

Individuals with lower activity levels were more likely than others to indicate a preference for having all of the arrangements made before leaving home, and were also more likely to indicate that the reputation or image of the destination is extremely important. These travellers were also more likely to indicate that they believed in paying whatever it costs to get the best quality.

Respondents who were undecided as to interest in Canada were less likely than average to indicate that the following phrase described them extremely well: "I like to engage in sporting activities that challenge me or push my physical limits."

Respondents in their twenties were more likely than average to report themselves as 'activity generalists' – those who participate in many sports/activities on their adventure travel. Perhaps this is because they are still discovering their key areas of interest at this age.

6. Activity Participation

Among this group of "outdoor enthusiasts," the activity that had been participated in by the most respondents on an outdoor trip in the past 5 years was 'shopping-local arts/crafts/souvenirs' (58%). Other popular activities that travellers had participated in were:

- Hiking (50%)
- Cultural Interpretation, First Nations, Native history and culture (46%)
- Whale watching (45%)
- Walking (43%)
- Cross-country skiing (39%)
- Bird watching (35%)
- Canoeing (30%)
- Cycling (27%)
- Rafting (27%)

(Please see the appendix for a full list of activities as well as comparison participation rates from the TAMS surveys)

Older travellers were more likely to have participated in 'softer' activities such as bird watching and cultural interpretation while younger travellers were more likely to have participated in 'harder' activities such as mountain biking.

Generally, those who were undecided about future travel to Canada had participated in fewer activities. This could possibly indicate that these travellers are just less enthusiastic travellers in general when it comes to participation in outdoor activities. Those who had been to Canada for outdoor/adventure travel were likely to have participated in more activities than those who had not.

7. Outdoor Adventure Travel Services

Survey respondents were asked about their purchasing behaviour with respect to guided activities and trips and trip packages.

Over half (53%) of respondents had participated in guided one day or half day activities in the past five years. 17% had taken 2-3 day guided trips, 23% had taken 4-7 day guided trips and 16% had taken guided trips of 8 or more days (multiple mentions were accepted). 23% indicated that they had purchased packages that included only one specific type of outdoor activity while 34% had purchased packages that included many different types of outdoor activity. 42% had purchased packages that included airfare. Female travellers were somewhat more likely than males to indicate that they had purchased any of these guided trips or packages.

Past travellers to Canada were substantially more likely to indicate that they had taken longer (e.g. 4+ days) guided trips. Those in the high activity level group were more likely to have taken any of the guided trips.

8. Trip Spending

The average amount 'typically' spent by these individuals on their outdoor adventure trips was $2100 US. The mean value generally increased with age. Those in their 40s and those over the age of 60 spent the most while travellers under the age of 30 spent the least. Females, travellers with past outdoor/adventure experience in Canada (particularly Northern Canada), those with positive interest in Canada and those with higher activity levels all indicated a slightly higher than average spend.

This group's reported spending for typical outdoor-oriented vacations was substantially higher than what is reported as the average spending per trip among US travellers who came to Canada in 2001 for a pleasure/holiday trip, $533 per trip (Source: International Travel Survey, Statistics Canada.)

9. Travel Time to Destination

The majority of respondents did not seem averse to long drives or flights to get to their destination of choice. Almost 60% said that they would drive more than 8 hours to get to their destination, with one-third saying they would drive more than one day. Long flights would not deter the majority (even those over 8 hours long) of these respondents. A small minority (14%) indicated that 4 hours was the maximum amount that they would spend driving to an outdoor destination.

10. Travel Group and Length of Trip

The majority of travellers usually take their outdoor adventure trips with one travel companion. Thirty-five percent take outdoor adventure trips on their own (males were slightly more likely 38% vs. 33% of females) and 18% as a family. Thirty eight percent had gone with two or more friends/relatives. (Multiple mentions were accepted).

The average number of days spent on a typical outdoor adventure trip was 9.6. Travellers over 50 were likely to spend more time. There was virtually no difference in average length of trip between the three activity level groups.

The average length of outdoor trips reported by this group was substantially longer than the average American's pleasure/holiday trip to Canada. (According to Statistic Canada, the average American pleasure/holiday trip duration to Canada was 4 (nights).)

11. Future activities

Respondents were most likely to indicate that they would participate in land adventure (88%) and water adventures (71%) in their next two years of travel. Those in their twenties were substantially more likely to express interest in participating in winter adventures (61%) in the next two years. Older travellers were more likely to express interest in nature and wildlife observation and cultural interpretation and much less likely than average to express interest in water adventures, winter adventures and air adventures.

Travellers with positive interest in Canada were more interested in winter adventures and nature/wildlife observation and cultural interpretation.

Those who were definitely interested in visiting Canada in the next two years were more likely to indicate an interest in air adventures and in winter adventures. Conversely, those who were undecided were less likely than average to indicate an interest in winter adventures.

12. Conclusions & Recommendations

Respondents generally had highly favourable attitudes and interest in travelling to Canada in the future. However, a number of findings from this survey can help outdoor operators increase the likelihood that these American outdoor enthusiasts will indeed actually travel to Canada. Positive attitudes and interest do not always translate into actual trip behaviour. While the number of travellers with positive interest was high, a large number of these respondents were undecided. Also, there were more travellers that were ‘probably likely’ to take a trip to Canada – these travellers would perhaps indicate that they are ‘probably likely’ to travel to a number of destinations, so they may need to be convinced or enticed with attractive offers.

Canada’s product would be well suited to many outdoor enthusiasts and Canada has the opportunity to increase its outdoor tourism share by attempting to change certain perceptions and by increasing awareness of positive attributes, and ensuring that information as to Canada’s outdoor product and attributes is readily available.

- Despite high likelihood of travel to Canada, **awareness** of Canada’s destinations was relatively low. Increasing overall awareness of Canadian opportunities and attributes therefore continues to be a challenge.
- Certain attributes seemed less likely than others to be selected by respondents and some image boosting may be required. For instance, Canada’s **good value** relative to the U.S. and other destinations and **hospitability** were only selected by half of respondents.
- The **desire to learn** while travelling could possibly reflect the need for time constrained North Americans to multi-task, even when they are on their vacations. More travellers wish to make the most of their leisure time and this includes incorporating both education and activity. Learning enables travellers to take something away with them – it provides something else that is ‘lasting’ from their trip – the knowledge that they learned. Therefore, even purely adventure-oriented operators could potentially benefit from promoting the learning component – any cultural components/skill acquisition/benefits of knowledgeable guides, etc...
- **Packaged value** is a strong theme for uplifting Canada’s selling proposition (particularly considering that over half of respondents had purchased guided half-day and day trips in the past, and two-fifths had purchased packages that included airfare and one-third had purchased multi-activity packages). Willingness to pay whatever is necessary to get the vacation they are after is less supported by those without past travel experience in Canada, and those who are undecided about their interest in visiting Canada.
- Packages should focus primarily on **1 week to 10 day excursions** in that over 50% report that this is the typical duration of their vacations.
- Promotion of packages also lends itself to **highlighting the diversity of activities** that outdoor adventure enthusiasts can experience in Canada, and more than 9-in-10 respondents claim that the activities they can do there influences their travel destination. A large percentage (85%) of outdoor adventure enthusiasts like to combine urban and wilderness adventures. **Package partnering** becomes a healthy concept as travellers seek to find pleasure both in the gateway cities that they travel through and the remote wilderness locations.

Recommendations for Potential Future Research

- In-depth psychographic analysis of geographically dispersed Americans by means of larger-scale American studies.
- Package tour analysis
- Focus groups → to further probe Americans on their perceptions and drivers. Open questions could increase the depth and range of knowledge on these tourists.
- Comparison of Canada on attributes (e.g. scenery, activities, value, climate, etc…) with perceived attributes of competitor countries.

Methodological Notes: *The occasion of the 2003 IATOS Expo in Chicago presented an opportunity for the CTC to survey this target group. Surveys were conducted using interactive touch screen technology (The Edge Strategeze), whereby 364 attendees completed electronic surveys at and around the CTC display booth. While having a key target market ('outdoor enthusiasts') all in one location offered a convenient opportunity for surveying, there are always limitations when there is no control group (e.g. the 'average' traveller.) The vast majority of respondents were from Illinois (81%) or neighbouring states (13%). Therefore, the survey results are not representative of the US population as a whole. It also must be noted that awareness levels of various regions of Canada may have been heightened due to the presence of provincial and regional destination booths and individual travel outfitters. The fact that they were willing to fill out the questionnaire (in return for a small gift and the possibility of winning one of two great prizes – to Newfoundland & Labrador or to Saguenay, Quebec) – could also mean that they were more inclined than the average enthusiast to have interest in Canada.*

Appendix 1

Familiarity and Interest in Canadian Provinces and Territories

Which of these Canadian provinces and territories would you say that you are familiar with?	
Ontario	65%
Quebec	45%
British Columbia	42%
Alberta	26%
Nova Scotia	20%
Manitoba	13%
New Brunswick	12%
Prince Edward Island	12%
Saskatchewan	10%
Yukon	10%
Newfoundland and Labrador	9%
Northwest Territories	7%
Nunavut	4%

Thinking of your future outdoor adventure plans, which of these Canadian provinces and territories are you interested in visiting? [5]	
British Columbia	63%
Newfoundland and Labrador	44%
Quebec	42%
Ontario	35%
Nova Scotia	35%
Prince Edward Island	33%
Alberta	28%
Yukon	27%
Nunavut	21%
Northwest Territories	20%
New Brunswick	19%
Manitoba	16%
Saskatchewan	10%

Please note that interest in certain regions of Canada may have been elevated due to exposure from these destinations at the IATOS Expo.

[5] Those who indicated that they would not consider travelling to Canada in the next two years skipped this question.

Appendix 2

Comparison of Activity Participation

List of Activities & Participation (past 5 years) from IATOS questionnaire			
Canoeing	30%	Other land activities	25%
Rafting	27%	Cross-country skiing	39%
Fishing	18%	Snowshoeing	21%
Sea Kayaking	17%	Snowmobiling	16%
River Kayaking	12%	Dog sledding	6%
Other Water Activities	23%	Helitours/flight seeing	15%
Hiking	50%	Hot air ballooning	12%
Walking	43%	Hang gliding	6%
Cycling	27%	Whale watching	45%
Mountain Biking	18%	Bird watching	35%
Trail Riding	17%	Bear watching	23%
Ice/Rock Climbing	13%	Shopping – local art/crafts/souvenirs	58%
Mountaineering	9%	Cultural Interpretation, First Nations, Native history and culture	46%

Activities participated in by at least 15% of American *Soft* Outdoor Adventure Enthusiasts	
Wildlife viewing	53%
Hiking/backpacking in wilderness settings	47%
Fishing	44%
Wildflowers/flora viewing	40%
Motor boating	39%
Kayaking or canoeing	38%
Cycling	37%
Downhill skiing	33%
Golfing	32%
Horseback riding	31%
Whale watching	25%
Bird watching	22%
Sailing	18%
Cross-country skiing	17%
White water rafting	15%

Please see the Canadian Tourism Commission's TAMS reports for more information (including Outdoor Enthusiasts' overlap with other activity-based segments).