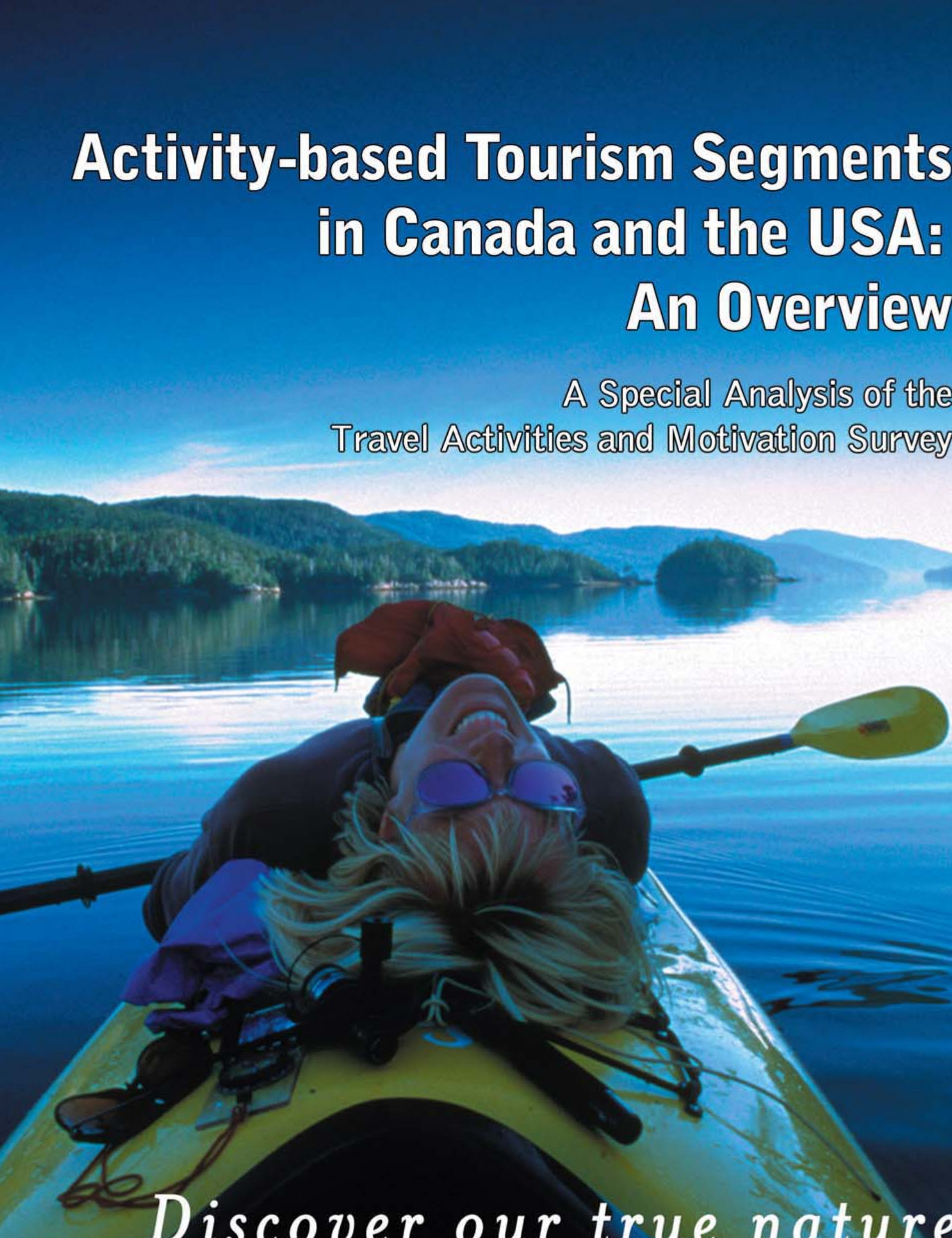
Activity-based Tourism Segments in Canada and the USA: An Overview

A Special Analysis of the Travel Activities and Motivation Survey



TAMS

Discover our true nature

Canadian Tourism Commission

Commission canadienne du tourisme

Activity-based Tourism Segments In Canada and the USA: An Overview

A Special Analysis of the Travel Activities and Motivation Survey (TAMS)

Prepared for:

The Canadian Tourism Commission (CTC)

Prepared by:

Research Resolutions
& Consulting Ltd.

National Library of Canada cataloguing in publication data

Main entry under title :

Activity-based tourism segments in Canada and the USA : an overview

Issued also in French under title: Survol des segments de marchés
touristiques du Canada et des États-Unis basés sur les activités.
"A special analysis of the Travel Activities and Motivation Survey (TAMS)"
ISBN 0-662-33860-X
Cat. no. C86-152/2003E

1. Tourism – Canada – Forecasting.
2. Tourism – United States – Forecasting.
3. Americans – Travel – Canada.
4. Travellers – Canada.
I. Research Resolutions & Consulting Ltd.
II. Canadian Tourism Commission.

G155.C3A37 2003 338.4'7917104648 C2003-980127-6

If you require additional copies, please visit our website at www.canadatourism.com or e-mail your order to the CTC Distribution Centre at: distribution@ctc-cct.ca. Please quote #C50173E when ordering by e-mail.

Table of Contents

1. Introduction

To obtain a better understanding of the potential size, characteristics and interests of activity-based market segments on both sides of the Canada/ U.S.A. border, the Canadian Tourism Commission (CTC) commissioned Research Resolutions & Consulting Ltd.[1] to undertake special analyses and reports based on the Travel Activities and Motivation Survey (TAMS).

Because marketing efforts are often different for the domestic and American markets, the reports provided to the CTC examine the Canadian and American markets separately. In this report – **Tourism Activity-Based Segments In Canada and the USA: An Overview** – key findings of the individual reports are summarized. For more information on each segment, the reader is directed to the following reports, available from the CTC.

Activity-Based Market Segment		
• Hard Outdoor Adventure Enthusiasts	• Canada	• USA
• Soft Outdoor Adventure Enthusiasts	• Canada	• USA
• Wine & Culinary Enthusiasts	• Canada	• USA
• Heritage Tourism Enthusiasts	• Canada	• USA
• Performing Arts Tourism Enthusiasts	• Canada	• USA
• Visual Arts Tourism Enthusiasts	• Canada	• USA
• Winter Outdoor Participants	• Canada	• USA
• Alpine Skiers		• USA

These reports focus on the tourists in each tourism activity segment who have taken leisure trips in or to Canada and exhibit a particular activity profile while on leisure trips in the past couple of years.

In addition to a *current* profile of these Canadian and American tourists, the TAMS survey has been modified to permit an assessment of the impacts of an aging population on market potential for each group. Comparisons of the market size, composition, and travel behaviour of North Americans in 2000 with estimates twenty-five years into the future provide tourism planners and marketers with critical information about the products and services that may be required to attract tourists from Canada's largest markets – Canadians travelling in Canada and Americans travelling to Canada – over the next two decades. A summary of this information is included in this report.

A "reality check" that provides 2001 volume and yield estimates for approximations of the TAMS activity-based markets derived from the Statistics Canada domestic and international travel surveys is also included.

2. Activity-Based Market Segments – 2000

2.1 Market Size

2.1.1 Activity-Based Market Segments

At over 200 million, the U.S.A. adult population is appreciably larger than the Canadian population (23.3 million). Consequently, it is not surprising that the potential market for each activity-based segment is larger in the United States than it is in Canada.[2] Nonetheless, among North American tourists with *recent Canadian travel experiences* there are at least one million adult Canadians and at least three million adult Americans in each activity-based tourism segment of special interest to the Canadian Tourism Commission (see appendix for definitions).

- On both sides of the border, there is a substantial market for **Soft Outdoor Adventure** – 7.1 million Americans who have taken a leisure trip to Canada recently and 4.4 million Canadians;
- **Heritage Tourism Enthusiasts** with recent trips to Canada are also common in Canada (2.2 million) and, to a much greater extent, in the U.S.A. (8.3 million) where they represent the largest activity-based market segment;
- Canadians and Americans contribute almost equally to the **Winter Outdoor Participant** market with 3.1 million Canadians and 3.7 million Americans;
- The **Visual Arts Enthusiast** market is appreciably larger in the U.S.A. (7.0 million) than it is in Canada (1.7 million) as is the **Wine & Culinary Enthusiast** market (5.5 million U.S.A. adults with recent trips to Canada and 1.5 million Canadian adults).

Table 1: Activity-Based Market Segments – In millions of Adults

	Total Adult Population		Took a Recent Leisure Trip In/To Canada	
	Canada	U.S.A.	Canada	U.S.A.
Millions of Adults 18+	*23.3*	*200.4*	*14.0*	*26.3*
Outdoor Oriented Segments				
Hard Outdoor Adventure	1.6	15.7	1.3	3.2
Soft Outdoor Adventure	5.3	35.5	4.4	7.1
Winter Outdoors Participants (excluding alpine skiing)	3.6	15.0	3.1	3.7
Alpine Skiing Participants	2.8	21.4	2.4	4.6
Cultural/Heritage Segments				
Heritage Tourism	2.6	34.5	2.2	8.3
Performing Arts	1.3	15.6	1.1	3.8
Visual Arts	2.1	27.6	1.7	7.0
Wine/Culinary	1.8	21.6	1.5	5.5

Source: Special TAMS Tabulations, page 7/8-1. See Appendix for unweighted base sizes.
Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts".

2.1.2 Rank Order of Activity-Based Market Segments

Total Market

Based on the rank order of various activity-based segments, Canadian travellers appear to have a stronger outdoors and winter orientation than do their American neighbours. This finding is not surprising in light of the fact that *all* of Canada offers opportunities to engage in winter outdoor activities and much of the country's population lives in close proximity to four season outdoor tourism products.

Table 2: Rank Order – All Adults

CANADA	U.S.A.
1. Soft Outdoor Adventure	1. Soft Outdoor Adventure
2. Winter Outdoors (excluding alpine skiing)	2. Heritage
3. Alpine Skiing	3. Visual Arts
4. Heritage	4. Wine/Culinary
5. Visual Arts	5. Alpine Skiing
6. Wine/Culinary	6. Hard Outdoor Adventure
7. Hard Outdoor Adventure	7. Performing Arts
8. Performing Arts	8. Winter Outdoors (excluding alpine skiing)

- Among *all* Canadian adults, the largest three market segments are associated with the outdoors: Soft Outdoor Adventure, participation in Other Winter Outdoor activities, and Alpine Skiing.
- Among *all* American adults, only one of the top three slots is associated with the outdoors – Soft Outdoor Adventure. The second and third most popular tourism activity segments are associated with Heritage and Visual Arts tourism activities.

Recent Travellers In/ To Canada

Within the subset of Canadians and Americans most apt to be in the market for Canadian tourism products – those who have demonstrated a willingness to travel in or to Canada in the past couple of years – Soft Outdoor Adventure and Other Winter (non-alpine ski) tourism activities predominate among Canadians. Heritage tourism tops the list among Americans, followed by Soft Outdoor Adventure and Visual Arts.

Table 3: Rank Order – Adults with Recent Travel Experience in Canada

CANADA	U.S.A.
1. Soft Outdoor Adventure	1. Heritage
2. Winter Outdoors (excluding alpine skiing)	2. Soft Outdoor Adventure
3. Alpine Skiing	3. Visual Arts
4. Heritage	4. Wine/Culinary
5. Visual Arts	5. Alpine Skiing
6. Wine/Culinary	6. Performing Arts
7. Hard Outdoor Adventure	7. Winter Outdoors (excluding alpine skiing)
8. Performing Arts	8. Hard Outdoor Adventure

2.2 Overlap Among Segments

Activity-based market segments reflect the tourism interests of Americans who have travelled to Canada and Canadians who have travelled within their own country in the past couple of years. Not surprisingly, these tourists may have travel interests that span indoor and outdoor activities, cultural and heritage experiences, warm and cold weather sports, and the like. Activity-based interests groups were not designed to be mutually exclusive and, in fact, there is considerable overlap among them.

Participation rates in various tourism activities also differ *within* and *between* the activity-based tourism segments. For details regarding individual activities, the reader is directed to the reports provided for each segment in Canada and the U.S.A.

2.2.1 Overlaps among Canadian Segments

Two-in-three Performing Arts Enthusiasts are also Visual Arts Enthusiasts. Winter Outdoor and Alpine Ski participants are very likely to be Soft Outdoor Adventure Enthusiasts. About half of Hard Outdoor Adventure Enthusiasts are also Winter Outdoors and Alpine Ski participants. As these examples demonstrate, there is a "like-to-like" pattern across Canadian market segments:

- **Cultural** groups have relatively high duplication rates with other **cultural** groups;
- **Outdoor** segments have relatively high duplication rates with other **outdoor** groups.

Table 4: Overlap - Canadian Market Segments With Recent Travel in Canada

	Outdoor Adventure		Other Outdoor		Culture			
	Hard	Soft	Other Winter	Alpine Ski	Heritage	Performing Arts	Visual Arts	Wine/ Culinary
Percent of Market Segment	%	%	%	%	%	%	%	%
Outdoor Oriented Segments								
Hard Outdoor Adventure	100	N/A	21	28	18	24	20	17
Soft Outdoor Adventure	N/A	100	65	60	40	34	38	39
Winter Outdoors (excluding alpine skiing)	48	46	100	43	35	34	26	28
Alpine Skiing	50	32	33	100	24	29	27	28
Cultural/Heritage Segments								
Heritage Tourism	30	20	25	22	100	53	49	32
Performing Arts	19	8	12	13	26	100	40	20
Visual Arts	26	15	15	20	40	66	100	30
Wine/Culinary	20	13	14	18	22	28	26	100

Source: Special TAMS Tabulations, page 8-1. See Appendix for unweighted base sizes.
Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts". See Detailed Tabulations for base sizes for each activity segment.

Awareness of these overlaps may prove useful for packaging and marketing Canada's tourism products. For example, it may be more beneficial to combine *Heritage* products with *Soft Outdoor Adventure* where there is a 20 per cent overlap than to combine soft outdoor experiences with *Performing Arts* where there is only an 8 per cent overlap with the Soft Outdoor Adventure Enthusiast market.

2.2.2 Overlaps among American Segments

The pattern of overlap among activity-based market segments of American tourists who have travelled to Canada in the past couple of years is very similar to the Canadian pattern. Specifically, the strongest overlaps occur *within* outdoor market segments and *within* cultural segments. Nonetheless, about half of the Americans in the Hard Outdoor Adventure Enthusiast and Other Winter Outdoor segments are also Heritage Tourism Enthusiasts. Furthermore, approximately one-third of each culture/heritage-oriented segment is also in the Soft Outdoor Adventure Enthusiast segment.

Table 5: Overlap - American Market Segments With Recent Travel in Canada

	Outdoor Adventure		Other Outdoor		Culture			
	Hard	Soft	Other Winter	Alpine Ski	Heritage	Performing Arts	Visual Arts	Wine/ Culinary
Percent of Market Segment	%	%	%	%	%	%	%	%
Outdoor Oriented Segments								
Hard Outdoor Adventure	100	N/A	30	31	19	25	20	17
Soft Outdoor Adventure	N/A	100	59	54	35	35	33	35
Winter Outdoors (excluding alpine skiing)	34	31	100	33	21	26	19	22
Alpine Skiing	45	35	41	100	21	26	24	23
Cultural/Heritage Segments								
Heritage Tourism	50	41	46	37	100	69	63	56
Performing Arts	30	19	26	21	31	100	41	31
Visual Arts	44	32	35	36	53	77	100	48
Wine/Culinary	30	27	32	27	37	46	38	100

Source: Special TAMS Tabulations, page 7-1. See Appendix for unweighted base sizes.
Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts". See Detailed Tabulations for base sizes for each activity segment.

2.3 Regional Strengths & Weaknesses

2.3.1 Where Canadian Tourists Live and Where They Go

Place of Residence

For the most part, Canadians are distributed across the country within each activity-based market segment in much the same way as are travellers as a whole. There are, however, some notable exceptions.

- Demand for Hard Outdoor adventure is especially strong in Ontario (41%) and especially weak in Quebec (11%). Ontario, with its two major urban areas, is also a particularly robust market for all cultural tourism segments – Heritage (42%), Performing Arts (48%), Visual Arts (42%) and Wine/Culinary tourism (41%);

Table 6: Place of Residence - Canadian Market Segments

		ATLANTIC	QUEBEC	ONTARIO	MAN/ SASK	ALBERTA	B.C.
Horizontal Percentages							
Total Travellers in Canada	%	8	24	35	8	11	14
Outdoor Oriented Segments							
Hard Outdoor Adventure	%	5	11	41	6	18	19
Soft Outdoor Adventure	%	7	28	34	6	11	13
Winter Outdoors (excluding alpine skiing)	%	8	28	33	8	13	10
Alpine Skiing	%	4	27	31	6	13	19
Cultural/Heritage Segments							
Heritage Tourism	%	8	17	42	6	13	14
Performing Arts	%	7	24	48	4	6	12
Visual Arts	%	4	19	42	7	11	17
Wine/Culinary	%	5	25	41	3	10	17

Source: Special TAMS Tabulations, page 1-1. See Appendix for unweighted base sizes.
Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts". See Detailed Tabulations for base sizes for each activity segment.

- Quebeckers tend to be under-represented within the Heritage and Visual Arts tourism markets;
- Alberta (18%) or British Columbia (19%) is "home" to disproportionately high numbers of Hard Outdoor Adventurers compared to the rate at which these provinces produce domestic travellers;
- Soft Outdoor Adventurers and those who participate in Other Winter Outdoor activities are distributed across the country in much the same way as are Canadian travellers in total.

Attraction Rates Among Canadian Tourists
Since many Canadians concentrate their travel *within* the province or region in which they live, it is not surprising that the three most populous provinces attract the highest share of most activity-based market sectors. Nonetheless, some regions can be said to have particularly high "attraction rates" compared to others because they lure high levels of Canadians who represent a particular market segment relative to the region's resident population.

Among **Canadian travellers as a whole**, *eastern* and *western* Canada have appreciably higher attraction rates than do Ontario and Quebec, suggesting that they lure a higher proportion of their tourism from outside their regions than do the two largest provinces in the country (see below for rank order).

- Alberta 2.8
- Atlantic Canada 2.5
- British Columbia 2.4
- Man/Sask 2.1
- Quebec 1.5
- Ontario 1.3

When attraction rates for various **market segments** are compared to those for Canadian travellers as a whole, it is clear that:

- Atlantic Canada has special appeal to Canadians interested in Heritage, Performing Arts and Wine/Culinary tourism;
- Alberta attracts a particularly high share of Hard Outdoor Adventure, Winter Outdoor Participants and Alpine Skiers, likely as a function of the Rocky Mountains and the outdoor tourism products that are associated with the province's physical environment. The province also has a high attraction rate among Heritage Tourism Enthusiasts, likely because of the inclusion of *local festivals and fairs*, and *western theme events such as the Calgary Stampede* as two of the defining activity of Heritage Tourism Enthusiasts;

Table 7: Attraction Rates Among Canadian Market Segments

		ATLANTIC	QUEBEC	ONTARIO	MAN/ SASK	ALBERTA	B.C.
Horizontal Rates							
Total Travellers in Canada	#	2.5	1.5	1.3	2.1	2.8	2.4
Outdoor Oriented Segments							
Hard Outdoor Adventure	#	2.3	1.5	1.5	2.4	3.3	3.6
Soft Outdoor Adventure	#	2.5	1.7	1.3	2.3	2.8	2.5
Winter Outdoors (excluding alpine skiing)	#	2.5	1.7	1.3	2.4	3.0	2.4
Alpine Skiing	#	2.3	1.8	1.3	2.6	3.1	3.2
Cultural/Heritage Segments							
Heritage Tourism	#	3.5	1.8	1.4	2.4	3.3	2.8
Performing Arts	#	3.0	1.9	1.7	1.7	2.4	2.4
Visual Arts	#	2.5	1.8	1.5	2.6	3.1	3.0
Wine/Culinary	#	3.4	2.0	1.7	2.1	2.9	3.0

Source: Special TAMS Tabulations, page 2-1. See Appendix for unweighted base sizes.
Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts". See Detailed Tabulations for base sizes for each activity segment.

- British Columbia has an especially high attraction rate among Hard Outdoor Adventure, Alpine Skiers, Visual Arts and Wine/Culinary Enthusiasts;
- In contrast, Ontario and Quebec have lower attraction rates than do Atlantic Canada, Alberta and British Columbia for most activity-based market segments. At the same time, Quebec shows some strength vis à vis Canadian leisure tourists as a whole in attracting Canadians with a particular interest in Wine/Culinary activities.

2.3.2 Where American Tourists Live and Where They Go

Place of Residence

Overall, Canada attracts about 1-in-3 of its recent leisure travellers from each of the three U.S.A. tiers, moving from states closest to the USA/Canada border (33%), through the mid-tier states (32%) to states furthest from the border (35%).[3] These travel incidence levels underscore the importance of border markets for Canada and the challenge of getting residents of Tier III states to visit Canada.

- The rate of travel to Canada by border state residents (33%) is about twice that of the border state population (18%).
- Conversely, over half of American adults live in Tier III states (54%) but only 1-in-3 of American adults who say they have been to Canada in the past couple of years live in these more distant states (35%).
- The Winter Outdoor activity-based market segment has especially strong appeal to Americans in border states (Tier I, 41%);
- Residents of Tier III states – those furthest from the US/Canada border – are over-represented among Alpine Skiers, Visual Arts and Heritage Tourism Enthusiasts when compared to other activity segments and to American travellers to Canada as a whole.

Table 8: Place of Residence Among U.S.A. Market Segments

		TIER I	TIER II	TIER III
Horizontal Percentages				
Total U.S.A. Adult Population	%	18	28	54
Total Travellers in Canada	%	33	32	35
Outdoor Oriented Segments				
Hard Outdoor Adventure	%	31	33	36
Soft Outdoor Adventure	%	33	33	35
Winter Outdoors (excluding alpine skiing)	%	41	29	30
Alpine Skiing	%	26	32	43
Cultural/Heritage Segments				
Heritage Tourism	%	28	33	40
Performing Arts	%	27	36	37
Visual Arts	%	25	34	41
Wine/Culinary	%	30	32	38

Source: Special TAMS Tabulations, page 2-1. See Appendix for unweighted base sizes.

Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts". See Detailed Tabulations for base sizes for each activity segment.

Provinces Visited by American Leisure Tourists
American leisure tourists with recent Canadian travel experience are most apt to have visited Ontario in the past couple of years (55%), followed by British Columbia (30%) and Quebec (25%). Atlantic Canada attracts about one-eighth (12%), followed by Alberta (10%) and Manitoba/Saskatchewan (7%).

Compared to these levels, some provinces or regions are especially successful in attracting Americans in activity-based market segments. It is, however, important to remember that a tourist may have visited a province or region and may engage in the activities that define each of the activity-based segments but may ***not*** have participated in these types of activities **in** the province or region. The activities could have been engaged in on trips to destinations throughout the world.

Table 9: Where Americans in U.S.A. Activity-Based Market Segment Visit in Canada

		ATLANTIC	QUEBEC	ONTARIO	MAN/ SASK	ALBERTA	B.C.
Horizontal Percentages							
Total U.S.A. Leisure Tourists in Canada	%	12	25	55	7	10	30
Outdoor Oriented Segments							
Hard Outdoor Adventure	%	7	28	56	8	13	32
Soft Outdoor Adventure	%	9	22	56	6	9	34
Winter Outdoors (excluding alpine skiing)	%	11	26	62	8	6	26
Alpine Skiing	%	6	29	51	6	12	41
Cultural/Heritage Segments							
Heritage Tourism	%	15	32	58	7	10	33
Performing Arts	%	16	41	58	6	8	30
Visual Arts	%	16	34	55	7	10	36
Wine/Culinary	%	16	33	61	7	10	29

Source: Special TAMS Tabulations, page 2-1. See Appendix for unweighted base sizes.
Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts". See Detailed Tabulations for base sizes for each activity segment.

- Atlantic Canada and Quebec attract disproportionately high levels of Americans in the Heritage, Performing Arts, Visual Arts and Wine/Culinary Segments;
- Quebec is particularly attractive as a destination to Americans in the Performing Arts segment;
- Ontario has special appeal to tourists interested in Other Winter Outdoors and Wine/Culinary activities;
- British Columbia is an especially popular destination among U.S. Alpine Skiers.

2.4 The Competitive Environment

Canada's ability to retain Canadians and to attract American tourists in activity-based market segments is influenced by the competitive destination environment. The more widely travelled members of a market segment are, the greater the chance is that Canada will be competing with other destinations worldwide to attract the same tourists.

The propensity to travel to competitive destinations is higher in most activity segments than it is within the Canada-bound travelling public at large in Canada and the United States. Thus, the challenge for attracting Canadians in a segment such as Performing Arts or Wine/Culinary is greater than would be attracting "typical" Canadian travellers because Wine/Culinary tourists are three times as likely to travel to Europe as are Canadian travellers as a whole. Similarly, Canada will face appreciable competition from Europe when attempting to attract American Performing Arts or Visual Arts tourists to Canadian destinations.

Table 10: The Competitive Environment

		Recent Adult Travellers In/To Canada					
		Canadian Adults Past 2 Year Travel To:			American Adults Past 2 Year Travel To:		
		USA	Any Sun/Sea	Europe	USA	Mexico/ Caribbean	Europe
Horizontal Percentages							
Total Travellers to Canada	%	36	22	9	93	21	19
Outdoor Oriented Segments							
Hard Outdoor Adventure	%	47	32	15	97	32	26
Soft Outdoor Adventure	%	39	23	10	95	27	18
Winter Outdoors (excluding alpine skiing)	%	38	22	11	95	23	23
Alpine Skiing Participants	%	50	34	14	95	28	27
Cultural/Heritage Segments							
Heritage Tourism	%	44	26	17	96	25	28
Performing Arts	%	45	26	28	96	34	37
Visual Arts	%	52	32	22	95	26	34
Wine/Culinary	%	51	43	27	96	31	27

Source: Special TAMS Tabulations, page 2-1. See Appendix for unweighted base sizes.
Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts". See Detailed Tabulations for base sizes for each activity segment.

There is less foreign competition for Soft Outdoor Adventure Enthusiasts on both sides of the border, although the U.S.A. offers strong competition for a sizeable minority of Canadians in this segment and for virtually all American Soft Outdoor Adventurers. These and other substantive competitive challenges for Canada are listed below.

- The **U.S.A.** is a strong competitor for leisure trips among Americans in virtually all segments and among Canadians in the following segments:
  - → Hard Outdoor Adventure
  - → Wine & Culinary
  - → Visual Arts
  - → Alpine Ski
- In Canada, considerable competition from **Europe** is evident in the following segments:
  - → Performing Arts
  - → Wine & Culinary
  - → Visual Arts
- Even more market segments in the USA are particularly susceptible to competition from **Europe**:
  - → Performing Arts
  - → Hard Outdoor Adventure
  - → Visual Arts
  - → Alpine Skiers
  - → Wine & Culinary
- **Sun/sea** destinations are especially attractive to Canadians in the following segments:
  - → Wine & Culinary
  - → Visual Arts
  - → Hard Outdoor Adventure
  - → Alpine Ski
- Sites in **Mexico** or the **Caribbean** are widely sought by Americans in three segments:
  - → Performing Arts
  - → Wine & Culinary
  - → Hard Outdoor Adventure

2.5 Canada's Image

2.5.1 Key Image Dimensions Among Activity-Based Market Segments

To highlight the image of Canada on key dimensions within activity-based market segments on the Canadian and American sides of the border, comparisons are provided for characteristics central to various activity groups. For information on the full array of image dimensions measured in TAMS within each market segment, the reader is encouraged to review individual reports.

Table 11: Ratings of Canada

		Beautiful Scenery		Outdoor Activities		Adventure & Excitement		Cultural Events		Historic Sites		Winter Destination	
		CA	US	CA	US	CA	US	CA	US	CA	US	CA	US
Total Travellers in Canada	#	9.1	9.2	8.7	8.2	8.1	8.0	8.0	7.8	8.0	7.5	7.5	6.3
Outdoor Oriented Segments													
Hard Outdoor Adventure	#	9.4	9.3	9.2	8.3	8.6	8.1	8.3	7.4	7.9	7.0	8.0	6.5
Soft Outdoor Adventure	#	9.1	9.2	8.8	8.2	8.3	8.0	8.0	7.7	8.0	7.3	7.8	6.5
Winter Outdoors (excluding alpine skiing)	#	9.1	9.2	8.9	8.3	8.5	8.1	8.1	7.5	8.0	7.2	8.1	6.8
Alpine Skiing	#	9.3	9.3	9.0	8.2	8.5	8.0	8.2	7.4	8.0	6.8	8.2	7.0
Cultural/Heritage Segments													
Heritage Tourism	#	9.2	9.3	9.0	8.3	8.4	8.2	8.2	8.1	8.3	7.6	7.6	6.2
Performing Arts	#	9.2	9.2	8.9	8.4	8.2	8.2	8.3	8.2	8.0	7.7	7.8	6.2
Visual Arts	#	9.3	9.2	9.0	8.3	8.3	8.1	8.2	8.0	8.1	7.5	7.6	6.0
Wine/Culinary	#	9.1	9.3	8.8	8.2	8.3	8.0	8.1	7.9	7.9	7.6	7.6	6.4

Source: Special TAMS Tabulations, page 13/14-1. See Appendix for unweighted base sizes.
Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts". See Detailed Tabulations for base sizes for each activity segment. Average ratings are based on those rating Canada on a ten point bi-polar scale ranging from 10 "agree completely" to 1 "disagree completely".

- Americans and Canadians in each activity segment rate Canada very favourably for being *a place with beautiful scenery*;
- Canadians in the outdoors and cultural segments are appreciably more positive in their appraisals of Canada for being one of *the best destinations for outdoor activities* than are their American counterparts;
- Americans in the Hard and Soft Outdoor Adventure segments are no more enthusiastic about Canada for being *one of the best destinations for outdoor activities* than are their cultural counterparts;
- Regardless of which outdoor segment they are in, American tourists tend to be less positive than Canadians and no more positive than the "typical" American visitor to Canada in their appraisal of the country as a *great place to experience adventure and excitement*. This finding may require some attention if efforts to attract American Hard Outdoor Adventure Enthusiasts to Canadian destinations are to be successful;

- American culture-oriented groups rate Canada more favourably for its *many cultural events and attractions* than for its *heritage sites.* U.S. tourists in outdoor segments are also relatively unenthusiastic about Canada's cultural events and attractions;
- Heritage Tourism Enthusiasts on both sides of the border, and especially the Americans, are more favourably disposed to Canada as a *beautiful* and *outdoor* destination than they are for it as a *great place to see historic sites and important places in history*;
- Ratings of Canada as *one of the best winter destinations* are relatively low for Canadians and Americans, although Canadians in winter and other outdoor market segments are more positive in this regard than are their counterparts in the U.S. and in all culture-based market segments.
- The comparatively low rating of Canada as a winter destination among American Alpine Skiers and Winter Outdoor Participants creates an image-building challenge to entice these tourists to Canada for skiing, snowmobiling, dog sledding and other winter sports.

2.5.2 Ratings Among Americans - By Recent Travel Experience in Canada

Americans tourists who have *not* recently travelled to Canada have different impressions of the country than do their counterparts who have taken a leisure trip to Canada in the past couple of years. Generally, Americans with no recent exposure to Canadian destinations are:

- appreciably more likely to refrain from offering a rating of the country than are those who have recently travelled in Canada; and
- among those who do rate Canada, ratings are significantly less favourable than is the case among those with recent Canadian tourism experiences.

Table 12: U.S.A. Leisure Travellers – Attitudes Toward Canada

	Any Recent Leisure Trips To Canada		No Recent Leisure Trips To Canada	
Adults 18+	26.3 million		117.5 million	
	Average #	**Can't Rate %**	**Average #**	**Can't Rate %**
Beautiful scenery	9.2	4%	9.0	12%
Great place for fishing	8.7	39%	8.8	32%
Clean/well cared for	8.7	6%	8.4	29%
Great place to relax	8.6	7%	8.2	22%
Lots for mature adults	8.6	13%	8.1	29%
Respects natural environment	8.5	13%	8.4	28%
Lots for families	8.5	15%	7.9	30%
Great place for hunting	8.4	52%	8.6	40%
Place with friendly people	8.4	7%	7.8	32%
Safe for visitors	8.3	12%	8.0	36%
One of best destinations for outdoor activities	8.2	20%	8.1	29%
Lots for young adults	8.1	28%	7.7	39%
One of best summer destinations	8.1	13%	7.4	35%
Great place to experience adventure & excitement	8.0	19%	7.9	32%
Place with interesting shops	8.0	16%	7.6	38%
Offers excellent value for money	7.9	11%	7.0	47%
Many cultural events & attractions	7.8	18%	7.5	31%
Great place to experience city life	7.7	18%	7.1	34%
Great place to experience different cultures	7.6	18%	7.5	29%
Great place to see historic sites	7.5	16%	7.3	30%
Great place for Aboriginal culture	7.4	39%	7.4	42%
Place for romance	7.2	30%	6.9	42%
Great place to experience "good life"	7.1	29%	6.8	46%
Popular, trendy place	6.6	25%	6.1	45%
One of best winter destinations	6.3	27%	5.7	40%

Source: Special TAMS Tabulations, page 13. Average ratings are based on those rating Canada on a ten point bi-polar scale ranging from 10 "agree completely" to 1 "disagree completely".

These differences demonstrate the importance of *exposure* to Canada and the challenge in attracting American visitors when upwards of one-third are unable to form an impression of the country for many of the dimensions covered in the research.

2.6 Demographic Variations

There are substantive demographic differences *among* activity-based market segments. At the same time, the demographic profile *within* a particular segment is similar on both sides of the Canada/USA border. A brief sketch of demographic characteristics is provided here but for more details, the reader is encouraged to examine individual reports.

Gender: Men predominate in the outdoor segments, and especially in Hard Outdoor Adventure, but men and women are about equally apt to be Soft Outdoor Adventurers. Heritage Tourism Enthusiasts are also evenly divided between men and women, but other cultural segments are dominated by women on the Canadian side of the border.

Age: Generally, the *outdoor* oriented activity segments are composed of younger travellers than are *heritage and culture* oriented segments. Outdoor activity segments that require more physical exertion – Hard Outdoor Adventure and Alpine Skiing – tend to attract younger travellers than do those that are less physically demanding such as Soft Outdoor Adventure.

Table 13: Demographic Differences – Gender, Age, Education & Household Income

		Recent Adult Travellers In/To Canada									
		Canadian Adults					American Adults				
		Gender		Avg. Age	Univ. Grad	Avg Income	Gender		Avg. Age	Univ. Grad	Avg Income
		M	F	Years		Cnd.$s	M	F	Years		U.S.$s
Horizontal Percentages											
Total Travellers to Canada	%	48	52	43.7	25	$54,200	52	48	47.3	31	$63,800
Outdoor Oriented											
Hard Outdoor Adventure	%	67	33	33.4	22	$59,900	62	38	39.0	39	$72,600
Soft Outdoor Adventure	%	50	50	39.2	26	$58,200	53	47	44.1	35	$71,000
Winter Outdoors (excluding alpine skiing)	%	56	44	40.2	20	$55,800	58	42	43.5	33	$72,400
Alpine Skiing	%	59	41	35.7	32	$64,600	59	41	40.1	43	$74,900
Cultural/Heritage											
Heritage Tourism	%	50	50	45.1	28	$60,000	51	49	48.9	34	$71,100
Performing Arts	%	37	63	42.9	36	$56,000	49	51	49.2	41	$71,900
Visual Arts	%	37	63	43.3	36	$63,100	47	53	47.4	41	$72,500
Wine/Culinary	%	46	54	46.5	27	$65,500	52	48	48.2	37	$76,600

Source: Special TAMS Tabulations, pages 3/5. See Appendix for unweighted base sizes.
Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts". See Detailed Tabulations for base sizes for each activity segment.. Average income is calculated on total stating income. All estimates are in 1998 Canadian dollars for Canadians and U.S. dollars for Americans. Average age is in years among travellers to Canadian destinations who are 18 years of age or older.

Affluence: Alpine Skiers and Wine/Culinary Enthusiasts are the most affluent market segments in Canada and the U.S.A. Among Canadians, travellers who engage in Other Winter Activities are the least affluent. This slot is filled by Soft Outdoor Adventurers from the U.S.A. . . . but members of *every* segment are more affluent than is the "typical" Canadian or American visitor to Canadian destinations.

With the exception of Alpine Skiers, the younger the market segment, the lower the annual household income is, likely because young travellers have not reached their peak earning years. Thus, heritage and cultural groups – those that tend to be older – have higher incomes than many of the outdoor market segments.

Education: Alpine Skiers, Performing and Visual Arts Enthusiasts are more likely than members of other segments to be university graduates. Those least likely to have a university degree are Other Winter Outdoor participants.

Household Composition: Consistent with their older ages, Performing Arts, Visual Arts and Wine/Culinary Enthusiasts are more likely to live in adult-only households. Thus, they are less likely to seek travel experiences that would appeal to children under 12 years of age than are younger *outdoor* segment members. Winter Outdoor Participants travelling to Canada from the U.S.A. are the most apt to represent families with children under twelve years of age.

Table 14: Demographic Differences – Place of Birth (Canada Only) & Household Composition

		Recent Adult Travellers In/To Canada							
		Canadian Adults					American Adults		
		Place of Birth		Household Composition			Household Composition		
		Canada	Other	Adult Only	Any Teens/ Children	Children under 12 Yrs	Adult Only	Any Teens/ Children	Children under 12 Yrs
Horizontal Percentages									
Total Travellers to Canada	%	87	13	67	33	25	71	29	22
Outdoor Oriented									
Hard Outdoor Adventure	%	85	15	69	31	22	67	33	24
Soft Outdoor Adventure	%	92	8	61	39	29	65	35	28
Winter Outdoors (excluding alping skiing)	%	91	9	67	33	24	59	41	34
Alpine Skiing	%	88	12	64	36	26	65	35	27
Cultural/Heritage									
Heritage Tourism	%	83	17	66	34	25	70	30	23
Performing Arts	%	76	24	77	23	15	78	22	17
Visual Arts	%	81	19	74	26	16	75	25	17
Wine/Culinary	%	83	17	76	24	18	78	22	16

Source: Special TAMS Tabulations, pages 6/7. See Appendix for unweighted base sizes.
Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts". See Detailed Tabulations for base sizes for each activity segment.. "Adult Only" are households with no members under 18 years of age. "Children under 12" are a subset of "Any Teens/Children".

Place of Birth (Canada only): Since Canada's population growth will be fuelled by immigration, place of birth will influence future market potential for various activity-based market segments. Virtually all *outdoor* segments draw higher proportions of their members from Canadians who were born in Canada than is the case for *cultural* market segments. Soft Outdoor Adventure and Winter Outdoors are the most homogenous in this regard, with more than 9-in-10 of their members being Canadian-born. In contrast, Performing Arts Enthusiasts are the least homogenous, with 3-in-4 members being Canadian born and the remaining 1-in-4 being born outside the country.

3. Activity-Based Market Segments – 2025/2026

3.1 Introduction

In 2000, there were approximately 23.3 million Canadians 18 years of age or older. Statistics Canada projects that this number will increase to 29.6 million by the year 2026, for an increase of 27 per cent. Similarly, in 2000, there were approximately 200.4 million Americans 18 years of age or older. The U.S. Census Bureau projects that this number will increase to 254.3 million by the year 2025, for an increase that is identical to Canada's (27%). When these population increases are applied to the TAMS data, estimates of market size and characteristics in 2025/2026 can be estimated, assuming that people in various age, gender and regional groups behave in the future as they did in 2000.[4]

Overall changes in the regional and age distributions of the American and Canadian markets for tourism in Canada are provided in the individual market segment reports. Here, the impact on market size for the activity-based market segments of special interest to the CTC are described. For aid in interpreting tables in this section, please refer to Section 5.4.

Also included in this section are the proportions of Canadians in each market segment who do and may participate in each market segment according to their place of birth. These findings are particularly important in light of the fact that immigration will contribute noticeably to Canada's growth over the next two decades.

3.2 Growth in Activity-Based Market Segments - Canada 2000 to 2026

The Canadian adult population will shift over the next two decades to an older one. Implications of this aging include a lower growth rate than might have been anticipated in the *total* number of Canadians who will take leisure trips in Canada over a two year period. Growth in the total domestic market is expected at a rate of about 24 per cent, or 10 per cent lower than would have been expected given the population structure of 2000.

Table 15: Canadian Adult Population – Activity-Based Market Segments

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
Adults 18+ in millions	**2000**	**2026**		
Total Canadian Adult Population	23.3	29.6	27%	
Canadians Who Take Leisure Trips in Canada	**14.0**	**17.4**	**24%**	**-10%**
Performing Arts Enthusiasts	1.1	1.5	44%	61%
Visual Arts Enthusiasts	1.7	2.4	39%	43%
Heritage Enthusiasts	2.2	3.0	37%	36%
Wine/Culinary Enthusiasts	1.5	2.0	36%	32%
Winter Outdoors (excluding alpine skiing)	3.1	3.4	11%	-61%
Hard Outdoor Adventure Enthusiasts	1.3	1.4	9%	-66%
Soft Outdoor Adventure Enthusiasts	4.4	4.8	9%	-66%
Alpine Skiing	2.4	2.6	9%	-67%

Source: Special TAMS Canada Special Calculations

Furthermore, market segments such as Hard and Soft Outdoor Adventure Enthusiasts and Alpine Skiers that have special appeal to younger adult tourists will grow between 2000 and 2026, but will grow at lower rates (-9%) than would have been expected given today's population structure. In contrast, market segments with particular appeal to older Canadians now, including Heritage Enthusiasts, Performing Arts Enthusiasts and Wine/Culinary Enthusiasts will grow at appreciably higher rates than would have been expected given today's population structure – in large part, because the population will age considerably over the next twenty-five years.

3.3 Growth in Activity-Based Market Segments - U.S.A. 2000 to 2025

The American adult population will also shift over the next two decades to an older one and one that is more highly concentrated in Tier III states – those furthest from the Canadian/American border. Since older Americans are more likely than younger ones to have the financial wherewithal and to be sufficiently seasoned domestic travellers to travel outside the U.S.A., it is not surprising that growth in the number of Americans who will come to Canada over the next two decades is predicted to be somewhat higher (31%) than is growth of the U.S. adult population as a whole (27%).

Table 16: U.S.A. Adult Population – Activity-Based Market Segments

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Adults 18+ in Millions	2000	2025		
Total U.S.A. Adult Population	200.4	254.3	27%	
Americans Who Take Leisure Trips to Canada	**26.3**	**34.4**	**31%**	**14%**
Heritage Enthusiasts	8.3	12.3	47%	76%
Performing Arts Enthusiasts	3.8	5.1	35%	30%
Wine/Culinary Enthusiasts	5.5	7.5	35%	31%
Visual Arts Enthusiasts	7.0	9.2	31%	16%
Winter Outdoor Activity Participants (excluding alpine skiing)	3.7	4.7	26%	-2%
Soft Outdoor Adventure Enthusiasts	7.1	8.8	25%	-7%
Alpine Skiing	4.6	5.7	25%	-8%
Hard Outdoor Adventure Enthusiasts	3.2	3.8	20%	-25%

Source: Special TAMS U.S.A. Special Calculations

At the same time, appreciably more robust growth is anticipated for activity-based market segments that appeal to older Americans – Heritage, Performing Arts and Wine/Culinary Enthusiasts followed by Visual Arts Enthusiasts – than is the case among activity segments that require considerable physical exertion and tend to appeal to younger Americans. The Hard Outdoor Adventure Enthusiast segment is expected to *under perform* most substantively relative to growth in the American adult population (-25%).

3.4 The Immigrant Market in Canada - 2000 to 2026

Immigration, along with the birth rate, will fuel Canada's growth over the next two decades. Since people born in different parts of the world have different tourism interests from one another and from those born and raised in Canada, cross-impacts of immigration flows and activity preferences are likely to alter the markets for some of Canada's activity-based market segments.

Currently, 1-in-5 Canadian adults are foreign-born (21%) but only 1-in-7 of all Canadian adults who take leisure trips in Canada were born outside the country (15%). By 2026, close to 3-in-10 of the country's adults will have been born outside Canada (28%) and one-fifth of all domestic travellers will be foreign-born (20%).

Outdoor activity-based market segments are dominated by people born in Canada, with only 1-in-10 Soft Outdoor or Winter Outdoor group members having been born outside the country. At this rate, outdoor segments attract foreign-born Canadians at about half the rate that would be anticipated based on the share foreign-born adults represent of the total Canadian population. Canadians born in Asian countries are especially *unlikely* to be members of outdoor segments, and particularly those that involve winter sports apart from alpine skiing.

Within the cultural segments, immigrants to Canada are represented at the same rate as their share of the total adult population would suggest. In the case of the Performing Arts Enthusiast segment, foreign-born Canadians represent a particularly high market share (27%).

Table 17: Participation in Activity-Based Market Segments By Place of Birth - 2000

		Place of Birth					
		Canada	Total Other	U.K.	Eastern Europe	Asia	Central/ S. America
Horizontal Percentages							
Total Canadian Adults	%	79%	21%	3%	2%	5%	3%
Total Travellers in Canada	%	85%	15%	3%	1%	3%	1%
Outdoor Oriented Segments							
Hard Outdoor Adventure	%	83%	17%	2%	2%	3%	2%
Soft Outdoor Adventure	%	90%	10%	2%	1%	1%	1%
Winter Outdoors (excluding alpine skiing)	%	89%	11%	3%	2%	*	1%
Alpine Skiing	%	87%	13%	2%	*	3%	1%
Cultural/Heritage Segments							
Heritage Tourism	%	80%	20%	3%	3%	2%	1%
Performing Arts	%	73%	27%	4%	4%	3%	4%
Visual Arts	%	80%	20%	3%	3%	3%	2%
Wine/Culinary	%	81%	19%	5%	1%	3%	2%

Source: Special TAMS Tabulations, page 8-3. See Appendix for unweighted base sizes.
*Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts". See Detailed Tabulations for base sizes for each activity segment. *Less than 0.5 per cent.*

Table 18: Participation in Activity-Based Market Segments By Place of Birth - 2026

		PLACE OF BIRTH					
		CANADA	TOTAL OTHER	U.K.	EASTERN EUROPE	ASIA	CENTRAL/ S. AMERICA
Horizontal Percentages							
Total Canadian Adults	%	72%	28%	2%	4%	6%	3%
Total Travellers in Canada	%	80%	20%	2%	3%	4%	2%
Outdoor Oriented Segments							
Hard Outdoor Adventure	%	79%	21%	2%	2%	3%	2%
Soft Outdoor Adventure	%	87%	13%	3%	1%	1%	1%
Winter Outdoors (excluding alpine skiing)	%	87%	13%	3%	3%	*	1%
Alpine Skiing	%	84%	16%	2%	1%	3%	1%
Cultural/Heritage Segments							
Heritage Tourism	%	74%	26%	5%	5%	1%	1%
Performing Arts	%	67%	33%	5%	8%	3%	5%
Visual Arts	%	76%	24%	5%	5%	3%	1%
Wine/Culinary	%	74%	26%	7%	1%	2%	4%

Source: Special TAMS Tabulations, page 8-3. See Appendix for unweighted base sizes.
*Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts". See Detailed Tabulations for base sizes for each activity segment. *Less than 0.5%.*

Assuming that current travel activity preferences persist between 2000 and 2026, the disparity between immigrants' share of the total Canadian population (28%) and most outdoor market segments' will become greater over time. Only 13 per cent of Soft Outdoor Adventurers or Winter Outdoor Participants and a somewhat higher proportion of Alpine Skiers (16%) will be foreign-born Canadians by 2026 even though immigrants will represent 28 per cent of all adult Canadians by then.

Membership in the various **cultural** activity-based segments will much more closely resemble the relationship evident between immigrants and Canadian-born adults in the national population than is the case for the **outdoor** segments.

For the proportions of each major source of Canada's immigration within the activity-based market segments, the reader is directed to Section 5.6 (summary table).

4. Some Reality Checks: Volume & Yields

4.1 Market Size – Overnight Person Visits

Efforts were made to extract the "real" tourism volumes of American and Canadian overnight visitors in various market segments in 2001 from the Statistics Canada's Canadian and International Travel Surveys. These estimates are based on very different parameters than those used to estimate market potential from the TAMS survey. The "volume" estimates provided here are **overnight person trips** taken over the 2001 calendar year to destinations in Canada by Canadians and Americans (all ages). The trip could have been for any purpose, so long as certain activity parameters were met.

As such, estimates provided here are not directly comparable to TAMS estimates of market size for any of the segments. Instead, they provide a different perspective on the relative positions of various activity-based markets. Only segments with approximate equivalents to the TAMS segments in the Canadian and International Travel Surveys (Statistics Canada) are shown (see Appendix for definitions).

4.1.1 Canadian Segments

- Approximately 1-in-14 of all overnight person visits made by Canadians or 5.0 million person visits fall within the **Soft Outdoor Adventure** category (see Table 19, following page).
- This number is appreciably greater than the number of Canadians who take overnight trips in Canada on which they go **alpine skiing** (1.7 million) or engage in **other winter sports** such as snowmobiling or cross country skiing (1.4 million).
- About 1-in-25 of all overnight person trips by Canadians can be characterized as **Heritage Tourism** trips (3.2 million).
- Since Heritage Tourists had to participate in multiple heritage-related activities in order to be included in this category, it is not surprising that this group is smaller than those Canadians who, by definition, needed only to go to a **cultural performance** (3.8 million) or to a **museum or art gallery** (4.8 million) on an overnight trip in Canada during 2001 to qualify as members of the Performing Arts and Visual Arts segments, respectively.

4.1.2 American Segments

- Approximately 1-in-10 of all overnight person visits made by American visitors to Canada in 2001 or 1.7 million person visits fall within the **Soft Outdoor Adventure** category.
- This number is appreciably greater than the number of Americans who take overnight trips in Canada on which they go **alpine skiing** (570,000) or engage in **other winter sports** and outdoor activities (366,000).

Table 19: Activity-Based Market Segments – CTS & ITS Market Size

	Overnight Person Trips	
	Canada	U.S.A.
In millions (see notes)		
Total Person Trips	73.9	15.5
Total Leisure Person Trips	59.7	12.2
Outdoor Oriented Segments		
Soft Outdoor Adventure	5.0	1.7
Winter Outdoors Participants (excluding alpine skiing)	1.4	0.4
Alpine Skiing Participants	1.7	0.6
Cultural/Heritage Segments		
Heritage Tourism	3.2	2.4
Performing Arts Participants	3.8	1.9
Visual Arts Participants	4.8	3.3

Source: Special 2001 CTS/ITS Tabulations, pages 7/8-1. CTS/ITS data are overnight person trips by Canadians/Americans of all ages on which the traveller claimed to engage in specific activities while in Canada. Appended is the correspondence between these activity segments and those used in the TAMS survey.

- About 1-in-6 overnight person trips by Americans fall into a **Heritage Tourism** category (2.4 million).
- Since Heritage Tourists had to participate in multiple heritage-related activities in order to be included in this category, it is not surprising that this group is smaller than the Americans who, by definition, needed only to go to a **museum or art gallery** (3.3 million) on an overnight trip in Canada during 2001 to qualify as a member of the Visual Arts segment. Those who went to a **cultural performance** account for 1.9 million overnight person trips in Canada by American tourists.

4.2 Use of Commercial Roofed Lodging

Tourists who rely on commercial roofed lodging on their trips in Canada tend to utilize more of the country's tourism infrastructure than do those who stay in private accommodations such as their own cottages/cabins or in the homes of friends and relatives. Not only do they stay in hotels, resorts, bed and breakfasts or commercial cottages but they also tend to dine out more and to engage in more activities on their trips than do tourists who stay with friends and relatives or in private cottages.

4.2.1 Nights by Canadians

- Of the 244 million person nights spent in Canada on trips in 2001, 1-in-4 were spent in commercial roofed lodging (60.3 million).
- In contrast, an appreciably lower proportion of the 28.3 million nights by Soft Outdoor Adventurers were spent in these types of accommodation (3.9 million or 14%), although 40 per cent of the person nights spent by these visitors were in campgrounds (11.4 million).
- Other Winter Outdoor Participants spent comparatively few of their 4.2 million nights in paid roofed commercial accommodation (18%) but were especially apt to stay in the homes of friends/relatives (53%) or in their own private cottages (26%).
- Alpine Skiers divided their 1.7 million nights almost evenly between paid roofed lodging (43%) and homes of friends and relatives (42%).
- Heritage Tourists also tended to divide their 19.6 million nights almost evenly between paid roofed lodging (34%) and the homes of friends and relatives (35%).
- The average length of stay in commercial roofed accommodation at Canadian destinations by domestic tourists varies by market segment, from a high of close to five nights among Soft Outdoor Adventurers (4.9) to a low of about three nights for Alpine Skiers (3.1) and Other Winter Outdoor Sports Participants (2.9).

Table 20: Activity-Based Market Segments – CTS & ITS –
Nights & Length of Stay in Commercial Roofed Lodging in Canada

	Person Nights in Commercial Roofed Lodging			
	Canada		U.S.A.	
In millions (see notes)	Total	Average # of Nights	Total	Average # of Nights
Total Person Nights	60.3	2.6	33.4	3.2
Outdoor Oriented Segments				
Soft Outdoor Adventure	3.9	4.9	4.7	5.5
Winter Outdoors Participants (excluding alpine skiing)	0.8	2.9	0.8	2.9
Alpine Skiing Participants	2.3	3.1	1.7	4.4
Cultural/Heritage Segments				
Heritage Tourism	6.6	4.0	7.6	4.0
Performing Arts Participants	4.6	3.2	4.1	3.0
Visual Arts Participants	8.9	3.7	9.5	3.8

Source: Special 2001 CTS/ITS Tabulations, page 10-1. CTS/ITS data are overnight person trips by Canadians/Americans of all ages on which the traveller claimed to engage in specific activities while in Canada (CTS 80km+). Appended is the correspondence between these activity segments and those used in the TAMS survey.

4.2.2 Nights by Americans

- Of the 62.2 million person nights spent in Canada by Americans on trips in 2001, over half were spent in commercial roofed lodging (33.4 million or 54%).
- A lower proportion of the 12.4 million nights by Soft Outdoor Adventurers were spent in these types of accommodation (4.7 million or 38%), although close to 3-in-10 of the person nights spent by these visitors were in campgrounds (3.5 million).
- Other Winter Outdoor Participants spent most of their 1.3 million nights in paid roofed commercial accommodation (60%) but were also staying in the homes of friends/relatives (364,000 or 28%).
- Alpine Skiers also spent the majority of their 3.0 million nights in paid roofed lodging (1.7 million or 56%).
- Heritage Tourists from the United States tended to divide their 13.7 million nights between paid roofed lodging (7.6 million or 55%) and other forms of lodging including camp sites (1.9 million or 14%), the homes of friends and relatives (1.6 million or 12%) and other forms of accommodation (2.3 million or 17%).[5]
- The average length of stay in commercial roofed accommodation at Canadian destinations by American tourists varies by market segment, from a high of between five and six nights among Soft Outdoor Adventurers (5.5) to a low of just under three nights for Other Winter Outdoor Sports Participants (2.9). [See Table 20 above for average number of commercial roofed lodging nights per market segment.]

4.3 Total Spending in Canada

4.3.1 Spending by Canadians

- Of the $19.4 billion spent by Canadians taking overnight trips in Canada during 2001, those who went to a museum or art gallery on their overnight trip spent the most money ($2,394 million).
- Heritage Tourism Enthusiasts and Soft Outdoor Adventurers each contributed over one billion dollars to tourism businesses in Canada during 2001. Domestic tourists who went to at least one cultural performance also spent over one billion dollars in Canada.
- Even though their per diems are comparatively high (see next section), the relatively small size of the domestic Alpine Skier market brings this group's spending to about $545 million.
- The combination of relatively small numbers, brief stays and reliance on private accommodation bring Other Winter Outdoors participants' spending to only $225 million over the course of 2001.

Table 21: Activity-Based Market Segments – CTS & ITS – Total Spending Excluding Carrier Fares*

	SPENDING ON OVERNIGHT PERSON TRIPS	
IN MILLIONS (SEE NOTES)	CANADA CND $S	U.S.A. CND $S
Total Person Trips	$19,409	$7,864
Outdoor Oriented Segments		
Soft Outdoor Adventure	$1,176	$1,047
Winter Outdoors Participants (excluding alpine skiing)	$235	$144
Alpine Skiing Participants	$545	$491
Cultural/Heritage Segments		
Heritage Tourism	$1,786	$1,803
Performing Arts Participants	$1,555	$1,089
Visual Arts Participants	$2,394	$2,282

*Source: Special 2001 CTS/ITS Tabulations, pages 7/8-1. CTS/ITS data are overnight person trips by Canadians/Americans of all ages on which the traveller claimed to engage in specific activities while in Canada. Appended is the correspondence between these activity segments and those used in the TAMS survey. *Spending excludes commercial carrier fares to/from Canada for American visitors and spending to leave Canada by Canadian visitors.*

4.3.2 Spending by Americans

- Of the $7.9 billion spent by Americans taking overnight trips in Canada during 2001, those who went to a museum or art gallery on their trip spent the most money ($2.3 billion).
- American Heritage Tourism Enthusiasts and Soft Outdoor Adventurers each contributed over one billion dollars to tourism businesses in Canada during 2001. Similarly, Americans who went to at least one cultural performance on their Canadian overnight trip spent over one billion dollars in Canada over the year.
- Even though their per diems are comparatively high (see next section), the relatively small size of the American Alpine Skier market brings this group's spending to about $491 million.
- The combination of relatively small numbers and brief stays bring Other Winter Outdoors participants' spending to only $144 million over the course of 2001.

4.4 Per Person Per Night Spending

4.4.1 Average Spending by Canadians

On average, a Canadian tourist spent $59.00 per person per night in Canada on an overnight **leisure** trip in 2001. This daily spend is considerably lower than the $80.00 per person per night average rate for **all** overnight domestic travellers because of the inclusion of business travel in the total estimates.

By way of contrast, Canadians in the Soft Outdoor Adventure market segment spent noticeably less than the overnight leisure average at $44.00 per person per night. This low per diem reflects the high degree of reliance on private accommodations and campgrounds among these tourists.

Much higher per diems are evident for those in the Alpine Ski ($101.00) and Heritage Segments ($94.00). The appreciably higher average spending in these groups likely reflects reliance on paid commercial accommodation among these groups.

Table 22: Activity-Based Market Segments – CTS & ITS – Spending Per Person Per Night

	Overnight Person Trips	
Per person per night	Canada Cnd $s	U.S.A. Cnd $s
Total Person Trips	$80.00	$127.00
Total Leisure Person Trips	$59.00	$111.00
Outdoor Oriented Segments		
Soft Outdoor Adventure	$44.00	$80.00
Winter Outdoors Participants (excluding alpine skiing)	$56.00	$106.00
Alpine Skiing Participants	$101.00	$162.00
Cultural/Heritage Segments		
Heritage Tourism	$94.00	$126.00
Performing Arts Participants	$93.00	$136.00
Visual Arts Participants	$92.00	$131.00

Source: Special 2001 CTS/ITS Tabulations, pages 12-1. CTS/ITS data are overnight person trips by Canadians/Americans of all ages on which the traveller claimed to engage in specific activities while in Canada. Appended is the correspondence between these activity segments and those used in the TAMS survey. Average spending excludes commercial carrier fares to/from Canada for American visitors and spending to leave Canada by Canadian visitors.

4.4.2 Average Spending by Americans

On average, every overnight American tourist in 2001 spent $127.00 per person per night in Canada. This is slightly more than is spent by the subset of these tourists on an overnight **leisure** trip in 2001 ($111.00 per person per night). The difference between the “total” and “leisure” overnight segments’ spending is likely a function of the inclusion of **business** travellers in the “total” per diem estimates.

At $80.00 per person per night, Americans in the Soft Outdoor Adventure market segment spent noticeably less than the typical American leisure tourist. This low per diem reflects the high degree of reliance on campgrounds and private accommodation among the outdoor oriented tourists.

Much higher per diems are evident for those in the Alpine Ski segment ($162.00). These Americans have the highest per capita spending of any group examined. Per person per night spending by Americans in any of the cultural sub-groups ranges between $126.00 and $136.00 – about the same as the “typical” American overnight tourist but appreciably higher than those in the Soft Adventure segment ($80.00).

5. Appendix

5.1 TAMS Definitions

The Travel Activities and Motivation Survey (TAMS) An association of Canadian tourism ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of leisure 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.

TAMS consisted of both a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents 18 years of age or over were selected randomly within the household. People participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mailback questionnaire. Usable questionnaires were received from 5,490 Canadians and 6,405 (26.0 %) U.S. respondents.

Projections to the TAMS Data Base The Canadian population 18 years of age or older was projected to the year 2026 and the corresponding USA population was aged to the year 2025. A special additional adjustment was made in the re-weighting of TAMS data to take into account an anticipated increase in the rate of educational achievement within the populations of both countries. In particular, it was assumed that the incidence of the highest level of education achieved in the period 1975 to 1999 represents a long term equilibrium of educational achievement. Figures for each sampling unit used in TAMS were supplied for aging the Canadian population and the USA by Ontario's Ministry of Tourism and Recreation (MTR). These projections included MTR's adjustments for increased educational achievement and immigration flows for Canada.

Activity Segments of Interest to the Canadian Tourism Commission

Following are the TAMS variables that were combined to create activity-based sub-markets of special interest to the Canadian Tourism Commission.

High Intensity Hard Outdoors - Took trip to experience adventure and excitement in past two years and minimum of two of the following activities if one activity is white water rafting; if no white water rafting, any one of: ice or rock climbing, mountain biking; dog sledding; hang-gliding; bungee jumping; heli-skiing; scuba diving. May include consumptive outdoor activities (hunting/fishing).

High Intensity Soft Outdoors - Minimum of two of the following from the TAMS "activities on trips in past two years" list and not already categorized as "High Intensity Hard Outdoor Adventure": recreational biking, biking as an overnight touring trip, any motorcycling, kayaking or canoeing, motor boating, sailing, wind surfing, hiking/backpacking, horseback riding, hot air ballooning, cross-county skiing, downhill skiing, snowboarding, any snowmobiling. May include consumptive outdoor activities (hunting/fishing).

High Intensity Wine/Culinary - Any of: Stay at cooking school, wine tasting school or gourmet restaurant with accommodation on the premises; or minimum of 2 of the following: touring a region's wineries; going to wineries for day visits; dining at internationally acclaimed restaurants.

High Intensity Performing Arts - At least one of experiences: different cultures/ways of life; experience city life; at least three of music festivals; literary festivals or events; theatre festivals; opera; ballet or other dance; theatre; classical music concerts; jazz music concerts; musical attractions such as Jazzland.

High Intensity Visual Arts - At least one of experiences: different cultures/ways of life; experience city life; at least two of art galleries; international film festivals; shop or browse – local arts & crafts studios.

High Intensity Heritage - At least one of experiences: different cultures/ways of life; visit historical sites/important places in history; participate in hands-on learning experience; at least four of Aboriginal cultural experiences in remote/rural setting; Pow Wow/other Aboriginal celebration; Aboriginal attractions; French Canadian cultural experiences; carnivals such as Caribbana; western theme events; farmers' fairs or markets; local festivals or fairs; children's museums; general history museums; science or technology museums; historical replicas of cities/towns; historic sites; pick your own farms / harvesting.

Any Alpine - alpine skiers (alpine, heli skiing, snowboarding) and/or ski package.

Any Other Winter - Any of: ice climbing, dog sledding, ice fishing, snowmobiling, cross country skiing (any or as a touring trip) [excludes alpine skiers and snowboarders].

5.2 Unweighted Base Sizes

Activity-Based Market Segments: Unweighted Base Sizes From the TAMS Mailback Questionnaire

UNWEIGHTED MAILBACK RECORDS	CANADA	USA
	#	#
Adult Leisure Travellers in the Past 2 Years	4,272	1,509
Soft Outdoor Adventure Enthusiasts	1,241	419
Hard Outdoor Adventure Enthusiasts	361	177
Wine/Culinary Enthusiasts	454	341
Heritage Enthusiasts	762	498
Performing Arts Enthusiasts	331	244
Visual Arts Enthusiasts	608	429
Winter Outdoors (excluding alpine skiing)	844	227
Alpine Skiing	651	254

Source: Special TAMS Canada/USA Tabulations, page 1.
Note: Segments are based on past two year leisure travel to a Canadian destination and participation in a pre-defined set of activities while on trips taken to any destination in the past two years. The activity list for each segment is provided in the Appendix.

5.3 Definition of USA Tiers

In TAMS analysis, the following states were assigned to three tiers, based on their distance from the USA/Canada border.

Tier I (Canada's Border States): Washington, Montana, North Dakota, Minnesota, Wisconsin, Michigan, New York, Vermont, New Hampshire, Maine, Alaska.

Tier II: Oregon, Idaho, Wyoming, South Dakota, Nebraska, Iowa, Illinois, Indiana, Ohio, Pennsylvania, Massachusetts, Connecticut, Washington D.C., Virginia, Maryland.

Tier III: Nevada, Utah, Colorado, Kansas, Missouri, Kentucky, Tennessee, West Virginia, Delaware, New Jersey, Rhode Island, California, Arizona, New Mexico, Texas, Oklahoma, Arkansas, Louisiana, Mississippi, Alabama, Georgia, North Carolina, South Carolina, Florida, Hawaii.

5.4 An Aid to the Reader

The accompanying table and text are provided to aid the reader in interpreting the columns shown in the summary tables associated with population projections.

Sample Table

Canada's Adult Population – Gender & Age

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
	2000	2026		
Adults 18+	*23.3 million*	*29.6 million*		
Men	49%	49%	27%	1%
Women	51%	51%	27%	-1%
18 - 34 years	31%	25%	0.47%	-98%
35 - 44 years	23%	17%	-7%	-124%
45 - 54 years	18%	16%	11%	-61%
55 - 64 years	12%	16%	77%	184%
65+ years	16%	26%	111%	309%

Source: Special TAMS Canada Tabulations, Table 1.

% of Adult Population In . . . 2000 Proportion of Canadian adults in 2000 who fit the demographic characteristic (e.g., age, gender, place of birth) or participate in a particular activity (e.g., travel to a particular destination; golf, ski , camp or go to a museum while on trips) now.
Example: 18 – 34 year olds represent 31 per cent of all Canadian adults, or 7.3 million of the 23.3 million Canadian adults (2000).

% of Adult Population In . . . 2026 Proportion of Canadian adults in 2026 who are projected to fit the demographic characteristic (e.g., age, gender, place of birth) or participate in a particular activity (e.g., travel to a particular destination; golf, ski, camp or go to a museum while on trips). **Example:** 18 – 34 year olds are expected to represent 25 per cent of all Canadian adults, or 7.3 million of the 29.6 million Canadian adults (2026).

Growth Rate from 2000 to 2026 Anticipated rate of change in the number of Canadian adults who will fit the demographic or behavioural characteristic by 2026. **Example:** the 7.3 million 18 – 34 year olds in 2026 is virtually identical to the 7.3 million 18 – 34 year olds in 2000.

Impact of 2026 Population Structure on Growth Rate How much the structure of the population projected for 2026 will influence the growth rate of a demographic or behavioural characteristic. Negative numbers suggest a downward pressure on growth rates and positive numbers represent an upward pressure. **Example:** the growth rate for 18 – 34 year olds (0.47%) will be 98 per cent lower than it would have been if the structure of the population had remained as it is was in 2000. Thus, if the population structure of 2000 were sustained to 2026, there would have been 9.2 million young adults in Canada, or 27 per cent more than there were in 2000 but changes in the population structure bring this number down to 7.3 million or the same number as there were in 2000, for a difference in the growth rate [0.47%/27%] of –98 per cent.

5.5 CTC TAMS Segment Correspondences in CTS/ITS 2001

Heritage (at least 2)	Festivals/Fairs Historic Sites Museums/Art Galleries
Performing Arts	Cultural Performances
Visual Arts	Museums/Art Galleries
Soft Outdoor Adventure (3 If Cnd; 2 If USA)	Boating Fishing Bird Or Wildlife Viewing (CTS Only) Nature Parks Walking Or Hiking (CTS Only) Any Camping Nights Cycling (CTS Only) Downhill Ski Cross Country Ski (CTS Only)
Alpine Skiing (Any)	Downhill Ski/Snow Boarding
Other Winter	USA: Quarters I, IV – Unspecified Outdoor Activity Cnd: cross country skiing; snowmobiling

5.6 Market Segments by Place of Birth

Participation in Activity-Based Market Segments By Place of Birth - 2000

	Place of Birth					
	Canada	Total Other	U.K.	Eastern Europe	Asia	Central/ S. America
Total Canadian Adults	%	%	%	%	%	%
Outdoor Oriented Segments						
Hard Outdoor Adventure	7	7	4	6	6	8
Soft Outdoor Adventure	25	14	14	11	8	9
Winter Outdoors (excluding alpine skiing)	17	9	12	15	2	10
Alpine Skiing	12	9	8	4	11	7
Cultural/Heritage Segments						
Heritage Tourism	11	13	12	18	6	6
Performing Arts	5	9	7	15	6	13
Visual Arts	9	11	9	14	11	10
Wine/Culinary	8	9	11	4	7	10

Source: Special TAMS Tabulations, page 8-3. See Appendix for unweighted base sizes.
Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts". See Detailed Tabulations for base sizes for each activity segment.

5.7 Activities Measured in TAMS

Codes For NET Activities: TAMS

Bird watching
Whale watching
Other wildlife viewing
Wildflowers / flora viewing
Recreational biking
Mountain biking
Biking – as an overnight touring trip
Motorcycling – day excursions on an overnight touring trip
Motorcycling – as an overnight touring trip
Kayaking or canoeing
Motor boating
Sailing
Wind surfing
White water rafting
Ice climbing
Rock climbing
Dog sledding
Seeing northern lights or other arctic experiences
Fishing – fresh water
Fishing – salt water
Ice fishing
Working out in a fitness centre
Jogging outdoors
Going on picnics in park settings
Golfing – play an occasional game while on a trip
Golfing – stay at a golf resort for one or more nights
Golfing – take a packaged golf tour to play on various courses
Hang-gliding
Hiking or back-packing in wilderness settings
Horseback riding
Hot air ballooning
Hunting – big game
Hunting – birds or small game
Parachuting
Bungee jumping
Playing baseball or softball
Playing basketball
Going bowling
Playing chess or backgammon
Curling
Playing football
Playing ice hockey
Playing squash
Playing soccer
Playing tennis
Playing volleyball
Ice skating
In-line / roller skating
Professional football games (as a spectator)
Professional golf tournaments (as a spectator)
Professional ice hockey games (as a spectator)
Horse races
National or international sporting events such as the Olympic

Skiing – cross country
Skiing – cross country as an overnight touring trip
Skiing – downhill
Heli-skiing
Snowboarding
Snowmobiling – day use on organized trail
Snowmobiling – as an overnight touring trip
Sunbathing or sitting on a beach
Scuba diving
Swimming in lakes
Swimming in oceans
Aboriginal (e.g., Native American) cultural experiences in a remote or rural setting where you stayed for one or more nights
Pow Wows or other aboriginal (e.g., Native American) celebrations, such as the Wikwemikong Pow-Wow
Aboriginal (e.g., Native American) attractions such as the Indian Museum of North America in Arizona or the Polynesian Cultural Centre in Hawaii
French Canadian cultural experiences
Musical festivals such as the jazz festival in Montréal or the Chicago Blues Festival
International film festivals such as the Cannes Film Festival
Literary festivals or events
Theatre festivals
Carnivals such as Mardi Gras or Rio’s Carnival
Western theme events, such as rodeos or the Calgary Stampede
Farmers' fairs or markets
Local festivals or fairs such as fall fairs, winter carnivals, Highland Games, Octoberfests, folklore festivals
Art galleries
Children's museums
General history or heritage museums
Science or technology museums such as the Smithsonian National Air and Space Museum
Opera
Ballet or other dance performances
Theatre
Concerts – classical
Concerts – jazz
Concerts – rock & roll / popular
Musical attractions such as the Rock 'n Roll Museum or Jazzland
Historical replicas of cities or towns with historic re-enactments such as Williamsburg
Historic sites such as Statue of Liberty, Acropolis or Fort Alamo
Movie theme parks like MGM studios
Science & technology theme parks like Epcot
Amusement parks like Disneyland
Garden attractions such as Cypress Gardens or Tivoli Park
Botanical gardens
Planetariums
Zoos
Aquariums
Natural wonders such as Niagara Falls or the Grand Canyon
Auto races (as a spectator)
Professional baseball games (as a spectator)
Professional basketball games (as a spectator)
Professional figure skating (as a spectator)
Scenic day or evening tours by boat
Scenic day tours by train
Going to wineries for day visits and tastings
BUSINESS ACTIVITIES
(WHILE ON A TRIP OF ONE OR MORE NIGHTS)
Attend business meetings out of town

Games (as a spectator)
Amateur sports / arts / hobby tournaments and competitions (as a spectator or participant)
Recreational dancing
Casinos
Local outdoor cafes
Movies
Restaurant dining – regional or local cooking
Restaurant dining – internationally acclaimed restaurants
Shop or browse – bookstores or music stores
Shop or browse – antiques
Shop or browse – gourmet foods in retail stores or farms
Shop or browse – local arts & crafts studios or exhibitions
Shop or browse – clothing, shoes and jewellery
Pick-your-own farms or participating in harvesting
Read for relaxation or personal interest (while on trip)
Camping – in large public campgrounds in national, state or provincial parks
Camping – in campgrounds outside national, state or provincial parks
Camping – in wilderness settings
Staying at a lakeside resort in summer
Staying at a lakeside resort in winter
Staying at a ski resort or mountain resort in summer
Staying at a ski resort or mountain resort in winter

Staying at a seaside resort in summer
Staying at a seaside resort in winter
Staying at a remote or fly-in lodge
Staying at a remote or fly-in outpost

Staying at a wilderness lodge you can drive to by car
Staying at a private cottage or condo you own
Staying at a private cottage or condo you rent
Staying at a cooking school with accommodation on the premises
Staying at a wine tasting school with accommodation on the premises
Staying at a gourmet restaurant with accommodation on the premises
Staying at a health spa
Staying at a working farm or guest ranch
Staying at a bed & breakfast
TOURING AND CRUISING (OVERNIGHT)
Guided scenic tours in the countryside, like fall colour tours where you stay one or more nights
Wandering around small towns and villages where you stay one or more nights
Touring a region's wineries where you stay one or more nights
Great Lakes cruises where you stay on board one or more nights
Submarine "cruises" where you stay on board one or more nights
Ocean cruises where you stay on board one or more nights
DAY TOURING
(WHILE ON A TRIP OF ONE OR MORE NIGHTS)
Coastal or lakeshore scenic drives in your own / rental vehicle
Guided bus day tours in a city
Scenic day tours in the countryside by bus
Scenic day tours by air

Attend trade shows out of town

Attend business conventions out of town
Attend conferences or seminars out of town
Attend company paid training out of town
Take a vacation paid for by your company (Incentive Travel)

Q.3 Getaways/Q. 8 Vacations
Took at least 1 trip in the **winter**
Took at least 1 trip in the **spring**
Took at least 1 trip in the **summer**
Took at least 1 trip in the **fall**

Q. 6 Getaways/Q.11 Vacations Use in Past 2 Years
Homes of friends & relatives
Hotels / Resorts / Country Inns

Motels

Bed & Breakfasts
Cottage, rented
Cottage, your own
Fishing or Hunting Lodges
Campgrounds / RV Parks – Fully serviced (water, sewer, electricity)
Campgrounds / RV Parks – Electricity only
Unserviced campgrounds or backcountry
Other
IF CAMPING:
What type of camping equipment did you use ***most often***?
Tent
Tent Trailer
Truck camper or van
Travel Trailer / Fifth wheel
Motorhome

Q. 15 – Package Used in past two years

Motorcoach touring package
A resort or cruise package
A theatre package
An adventure package
A ski package

A city package

An educational package
Some other type of package
Travel to Ontario
Ever
Never

6. Notes

[1] Research Resolutions & Consulting Ltd., 16 Hepbourne Street, Toronto, Ontario M6H 1J9. Tel 416/531-9973 Fax 416/534-1372 E-mail rogers.judy@sympatico.ca

[2] Other factors that influence market size are related to the ways the segments are defined. Several groups have very stringent definitions and represent people with a keen interest in a set of activities when they travel while other groups such as Alpine Skiers and Other Winter Outdoor Participants are more broadly defined and include anyone who participates in the stated activities while on recent trips. These definitional considerations have an impact on the relative size of the groups. In most cases, the groups were *not* constructed to be mutually exclusive and there is, in fact, considerable duplication among some of them.

[3] See Section 5.3 for states included in each tier.

[4] See Footnote #2.

[5] Listed as “other” in the ITS questionnaire and could not be assigned to commercial or non-commercial lodging.