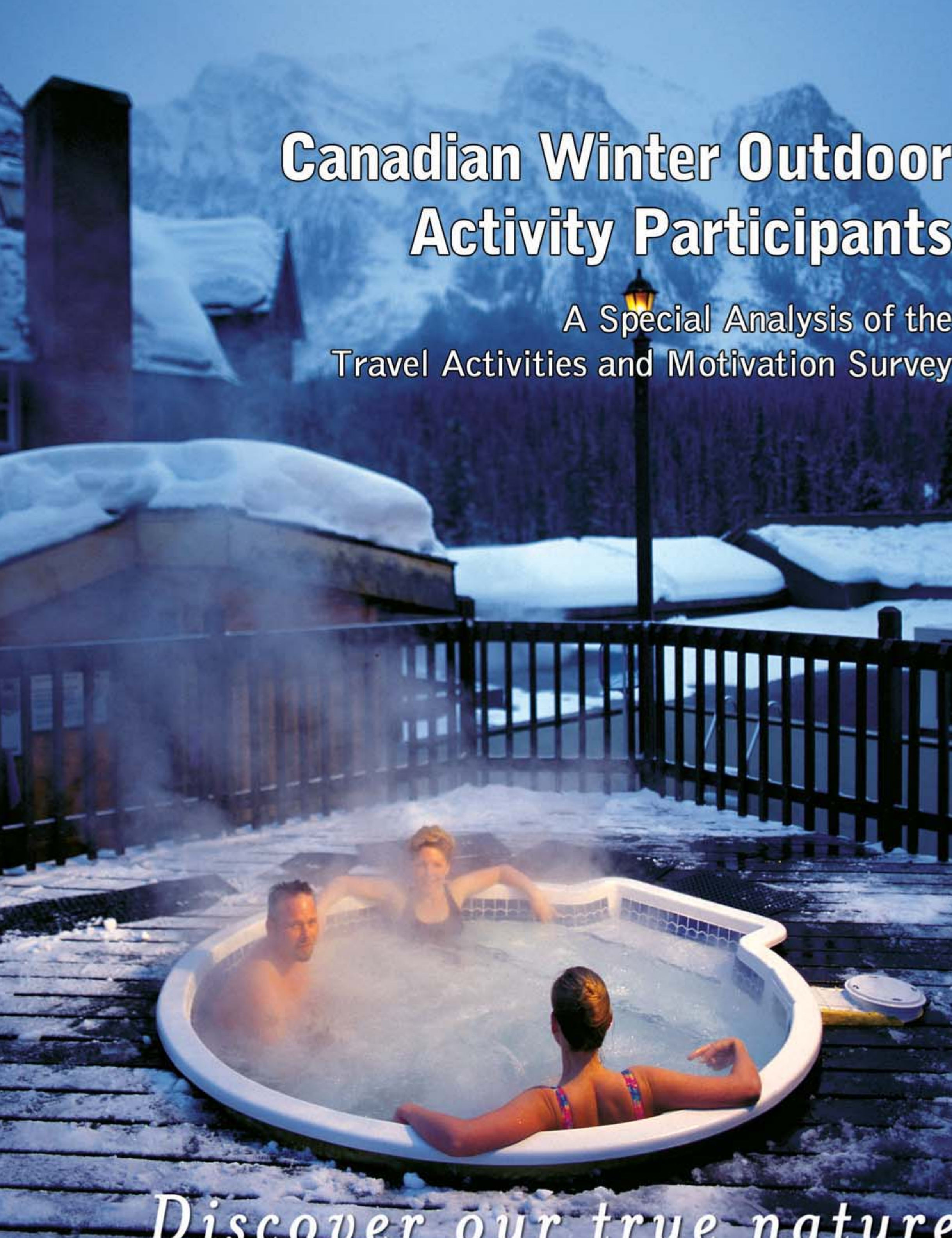
Canadian Winter Outdoor Activity Participants

A Special Analysis of the Travel Activities and Motivation Survey



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Canada

Canadian Winter Outdoor Activity Participants

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

Prepared for:

The Canadian Tourism Commission (CTC)

Prepared by:

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& Consulting Ltd.

Second inset photo:
courtesy of Ice Hotel Quebec-Canada Inc.
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National Library of Canada cataloguing in publication data

Main entry under title:

Canadian winter outdoor activity participants

Issued also in French under title: Touristes canadiens adeptes des activités de plein air hivernales.
"A special analysis of the Travel Activities and Motivation Survey (TAMS)".
ISBN 0-662-33871-5
Cat. no. C86-157/2003E

1. Tourism–Canada.
2. Outdoor recreation–Economic aspects–Canada.
I. Canadian Tourism Commission
II. Research Resolutions & Consulting Ltd.

G155.C3C32 2003 338.4'7917104648 C2003-902127-0

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1. Introduction

Canada offers a wide range of tourism experiences to its residents. In order to obtain a better understanding of the potential size, characteristics and interests of Canadian activity-based market segments, the Canadian Tourism Commission (CTC) commissioned Research Resolutions & Consulting Ltd. to undertake special analyses and reports based on the Travel Activities and Motivation Survey (TAMS). This report focuses on **Winter Outdoor Activity Participants** – Canadians who have taken leisure trips in Canada and engage in winter outdoor activities when on recent trips. As such, they have taken leisure trips in Canada and, in many cases, to other destinations in the past couple of years and have included at least one of the following activities on these trips.

- ice climbing
- dog sledding
- ice fishing
- snowmobiling
- cross-county skiing

Winter outdoor sports participants may also have engaged in downhill skiing or snowboarding while on their travels, but the alpine winter sports are *not* used to define the group.

These tourists provide a rich source of information for tourism businesses and marketers who want to increase or retain the Winter Outdoor Activity market in Canada in the future.

In addition to a *current* profile of these Winter Outdoor Activity Participants, the TAMS survey has been modified to permit an assessment of the impacts of an aging population on market potential for this group. Using population projections for Canada obtained from Statistics Canada, TAMS data were "aged" twenty-five years into the future. Comparisons of the market size, composition, and travel behaviour of Canadians in 2000 with estimates of the market profile in 2026 provide tourism planners and marketers with critical information about the products and services that may be required in the future to attract tourists from Canada's largest market – Canadians travelling in Canada. Chapter 4 of this report is devoted to the impacts of population changes on the domestic Winter Outdoor Activity Participant (excluding alpine skiers) market.

Additional reports, featuring profiles of other outdoor and cultural segments in the United States and Canada are available from the CTC. Topics include Soft Outdoor and Hard Outdoor Adventure Enthusiasts, Visual Arts, and Performing Arts Enthusiasts, Wine and Culinary Enthusiasts, and Heritage Tourism Enthusiasts.

The reader is advised that the term *Winter Outdoors* is used throughout this report to describe the group of Canadian travellers who engage in one or more winter outdoor activities apart from alpine skiing. As noted above, these individuals may also be skiers, but alpine skiing and snowboarding are not used to *define* the market segment.

2. Executive Summary

2.1 Winter Outdoors Activity Participants: Market Size

Of the 23.3 million Canadian adults in 2000, about 3.6 million are Winter Outdoor Activity Participants (15%). Of these, close to 9-in-10 claim to have taken a leisure trip within Canada during the past two years or so. Thus, the domestic market for Canada's winter outdoor products is approximately 3.1 million adults.

Canadians from all parts of the country are represented in the Winter Outdoor Activity Participant segment and with some minor variations, mirror the adult population distribution of Canada as a whole. For example, 1-in-12 Canadians live in Atlantic Canada and the same proportion of Winter Outdoor Activity Participants live in these four provinces (8%). Quebec represents one-quarter of the Canadian adult population and a slightly higher proportion of outdoor enthusiasts (28%). Conversely, Ontario residents are slightly under-represented within the winter outdoor segment (33%) compared to their proportion of Canada as a whole (38%).

Manitoba and Saskatchewan residents are represented in the Winter Outdoor Activity Participant market on par with their share of the total population. A marginally higher proportion of these winter outdoor enthusiasts are from Alberta (13%) than would be expected based on Alberta's contribution to the total Canadian population (9%) whereas somewhat fewer are British Columbians (10%) than might be expected (13%).

The comparative under-representation of Ontario within the winter market segment is likely a result of the reluctance of residents of Canada's largest urban centre – Toronto Census Metropolitan Area (CMA) – to participate in winter outdoor activities when they travel. This city represents 16 per cent of Canada's adult population but only 9 per cent of the winter outdoor market segment. Residents of Montréal CMA and Vancouver CMA do not exhibit Torontonians' reluctance to embrace the outdoors on their winter travels.

Some regions have particularly high "attraction rates" compared to others because they lure high levels of Winter Outdoor Activity Participants relative to their resident populations. Regions that are especially successful in attracting Winter Outdoor Activity Participants over a two year period relative to their share of the Canadian adult population – that is, those with a particularly high "attraction rate" – include Alberta (3.0) followed by Atlantic Canada (2.5), Manitoba/Saskatchewan (2.4) and British Columbia (2.4).

Ontario is the least successful province in attracting these outdoor tourists – this province represents 38 per cent of the country's adults and 51 per cent of winter outdoor enthusiasts, for an "attraction rate" of 1.3. Quebec falls between the high levels evident for Canada's eastern and western regions, representing 25 per cent of the adult population and attracting 42 per cent of Winter Outdoor Activity Participants over a two year period, for a 1.7 "attraction rate".

The U.S.A. is a strong competitor for travel within the winter outdoor activity segment. Almost 2-in-5 of these tourists say they have taken a leisure trips to the United States (38%) and over one-fifth have gone to a sun/sea destination over the past couple of years (22%). Approximately half of them have travelled to any destination outside of Canada – including the U.S.A., Europe and other countries – over the past two years (48%).

2.2 Winter Outdoor Activity Participants: Demographic Characteristics

Winter Outdoor Activity Participants are concentrated at the younger end of the adult age spectrum. Two-thirds of them are between 18 and 44 years, with a higher proportion falling into the 18 to 34 year age group (38%) than in the 35 to 44 year age group (28%). Conversely, these Canadians are substantively under-represented at the older end of the age spectrum. One-twelfth are 65 years of age or over (8%) whereas 1-in-8 recent Canadian leisure travellers as a whole fall into this older age group (13%).

The majority of Winter Outdoor Activity Participants live in adult-only households (67%).

The average household income for the typical domestic leisure visitor in Canada is $54,900 and the average for the sub-group with a particular interest in the outdoors during the winter is $55,800.

Like income, levels of formal education are very similar between “typical” Canadian leisure travellers and those who engage in winter outdoor activities on their trips. Thus, one-fifth of Winter Outdoor Activity Participants have at least one university degree (20%) and a further two-fifths (41%) have had some other form of post-secondary education.

Winter Outdoor Activity Participants are more likely to be Canadian-born (91%) than is the general domestic travelling public (85%) and than is the Canadian population at large (79%). The relative weakness of *new Canadians* within this outdoor-oriented market segment is noteworthy from a long term market demand perspective because Canada will be relying more heavily on immigration to sustain its population over the coming decades than it has in the past.

2.3 Outdoor Activities among Winter Outdoor Activity Participants

By definition, Winter Outdoor Activity Participants participate in at least one outdoor winter activity apart from downhill skiing while on trips. They may have engaged in these activities while on a recent trip in Canada or on trips to other destinations, worldwide. The participation rate is highest for cross-country skiing, followed by snowmobiling and ice fishing.

Winter Outdoor Activities Engaged in on Trips in the Past 2 Years

- Cross country skiing (47%)
- Snowmobiling (35%)
- Ice fishing (34%)
- Dog sledding (4%)
- Ice climbing (3%)

Even though it is not used to define the Winter Outdoor Activity Participant segment, downhill skiing constitutes a trip activity for 3-in-10 of these Canadians and snowboarding attracts about 1-in-20.

While on trips, over half of Canada’s Winter Outdoor Activity Participants view wildlife and/or go fishing in fresh water and slightly fewer hike or backpack in wilderness settings while on trips. About two-fifths cycle, golf, and/or go motor boating – likely related to their enthusiasm for fishing – while on their holidays. One-third also view wildflowers and flora or go kayaking or canoeing, while about one-quarter go whale watching and/or bird watching. This wide array of popular outdoor activities on recent trips is suggestive of a market segment that enjoys the outdoors during *all seasons*.

About 4-in-10 winter outdoor enthusiasts go to museums or zoos, about one-third go to aquariums, live theatre performances, and about one-quarter go to art galleries, botanical gardens, and/or casinos on their trips. Since these attractions tend to be *indoors,* they may provide welcome relief from the cold to Canadians on trips in which they spend time engaging in winter outdoor experiences.

2.4 Overlap With Other Activity-Based Segments

The 3.1 million Winter Outdoor Activity Participants with recent Canadian leisure travel experiences have relatively narrow tourism interests. One-quarter are also Heritage Enthusiasts (753,000, or 25%), about one-seventh are Visual Arts Enthusiasts (454,000, or 15%), slightly fewer are Wine/Culinary Enthusiasts (421,000, or 14%) and one-eighth are Performing Arts Enthusiasts (365,000, or 12%).

These overlaps suggest comparatively limited cross-market packaging and marketing opportunities for cultural experiences within the domestic Winter Outdoor Activity market.

2.5 Image Challenges & Media Sources

Canada is most highly rated by domestic Winter Outdoor Activity Participants for attributes that support an *outdoors* image:

- A place with beautiful scenery
- One of best destinations for outdoor activities
- A great place to relax and get away from it all
- A place with lots of things for families to see and do
- A great place for fishing
- A place with lots of things for mature adults to see and do
- One of best summer destinations
- A great place for hunting

This market segment also considers Canada to be a place that that offers adventure and excitement, is safe for visitors, is clean and well cared for, has friendly people and offers a lot for young people to see and do.

Less favourable ratings are accorded attributes associated with shopping opportunities, respecting the natural environment, a place to experience other cultures including Aboriginal culture, and urban attractions. Canadians in the winter outdoor activity segment are least positive about their country as a destination that offers value for money, or one with a popular or trendy image.

It would be expected that winter enthusiasts would have a favourable attitude toward Canada as a winter destination and they do. These winter travellers rate Canada significantly more favourably for its winter tourism experiences (8.1 on a ten point scale) than do Canadian travellers as a whole (7.5 on a ten point scale). Nonetheless, Winter Outdoor Activity Participants rate Canada significantly better as a summer destination (8.6 on a ten point scale) than as a place to go in the winter.

Image building and product awareness messages to Winter Outdoor Activity Participants are likely to achieve the highest reach in daily and weekend editions of local newspapers, including the travel sections of these editions and through the Canadian Automobile Association (CAA). Sportsmen's shows, RV/camper shows and boat shows are also popular with outdoor winter enthusiasts and could prove to be useful venues for marketing winter product to the domestic market.

2.6 Impacts of Population Changes

Three fundamental changes in Canada's population structure might be taken into account in tourism planning and product development for domestic Winter Outdoor Activity Participants over the next two decades:

- Provinces and regions throughout Canada will grow at different rates, with Ontario and British Columbia experiencing the highest growth rates and Quebec and Atlantic Canada experiencing the lowest. At an estimated 37 per cent increase in the adult population of Ontario by 2026 compared to a 27 per cent increase for the entire country, the pool of Ontarians from which Canada has to draw will increase from 8.9 to 12.2 million, and the Toronto CMA will increase from about 3.6 million to 6.1 million by 2026.
- Older people – those who are at least 55 years of age – will represent an increasingly sizeable proportion of the Canadian population. They currently account for over one-quarter of the adult population (28%) but will represent over two-fifths by 2026 (42%).
- Canadian residents born outside Canada will increase from about 21 per cent now to 28 per cent by 2026, with much of this increase being absorbed by major urban centres that act as reception centres for new Canadians, and particularly Toronto and Vancouver. By 2026, more than half of adult residents of each of these metropolitan areas will have been born outside Canada.

2.7 Implications for Winter Outdoor Activity Participants

There will be an increase in the absolute number of Canadians who will be in the market for winter outdoor activities between 2000 and 2026, from an estimated 3.6 million now to about 4.1 million in 2026. Canada's likely share of this market – those who will seek winter outdoor experiences and take leisure trips within Canada – is also expected to grow by a modest amount, from 3.1 million to 3.4 million.

These growth rates are *lower* than the population growth rate of Canada as a whole, primarily because winter outdoor activities tend to appeal to younger people and to those who are born in Canada. Just as the younger end of the age spectrum will diminish as a proportion of the total population over the next two decades, so too will the market for winter outdoor activities – unless changes are made in the amenities and services offered by tourism businesses who serve this market segment to better accommodate the needs and interests of an aging population.

And just as the proportion of Canadians who are familiar with Canada's natural environments *decreases* as Canada-born residents decrease as a proportion of the general population, so too will the market for winter outdoor activities – unless changes are made to entice new Canadians to experience Canada's natural settings and changes are made in cultural amenities (e.g., language, dietary needs, religious observances, etc.) offered by tourism businesses who serve Winter Outdoor Activity Participants to better accommodate the needs and interests of a multi-lingual, multi-cultural population.

If the new generation of Canadians displays similar tourism activity preferences to their 2000 counterparts, the impact of an aging population will result in a shift away from strenuous outdoor activities – particularly those that are engaged in during the winter – and a corresponding shift toward non-strenuous *warm weather* outdoor activities and indoor cultural events and attractions.

2.8 Summary

The domestic Winter Outdoor Activity Participant market for Canada is characterized by its youth, by the predominance of men, by the predominance of Canadians who were born in Canada, and by noticeable under-representation in Ontario and particularly in the greater Toronto area.

Cross country skiing, followed by snowmobiling and ice fishing are especially popular among Canadians in this market segment, but dog sledding and ice climbing remain comparatively small *niche* markets. In addition to their winter tourism activities, Winter Outdoor Activity Participants are apt to be found hiking and backpacking, wildlife and flora viewing, fishing, canoeing or kayaking and cycling on trips. Thus, while they engage in winter outdoor activities, they may also be characterized as *all season* outdoor tourists.

Of the market segments of special interest to the CTC, domestic Winter Outdoor Activity Participants currently represent the second-largest pool of potential visitors for Canada's outdoor-oriented tourism businesses – 3.6 million adult Canadians. Of this sizeable pool, close to 9-in-10 have taken recent leisure trips in Canada (3.1 million), leaving limited opportunity for growth.

Despite the size of the potential domestic market, retention of the Winter Outdoor Activity Participant segment will become increasingly difficult as the Canadian population becomes more highly urbanized, more concentrated in Ontario, more foreign-born and older.

As traditional markets decline because of changes in the population structure, Canada may have to develop a multi-pronged strategy to retain and/or grow the domestic Winter Outdoor Activity Participant segment:

- Provide outdoor product with varying levels of physical exertion so that nature-based tourism businesses can continue to attract the energetic, action-oriented youth and family markets but can also attract the increasing number of older Canadians who may retain their interest in the outdoors but will require gentler outdoor experiences; and
- Provide additional services and amenities that cater to the language, dietary and cultural needs of new Canadians.

Promotion of Canada's winter outdoor products will have to take into account the ability of various regions of the country to *deliver* on expectations. With changing climate and snow cover levels, ensuring appropriate winter conditions for snowmobiling, ice fishing, dog sledding and cross country skiing may become an increasing challenge for the most accessible tourism regions of Canada.

3. Canadian Winter Outdoor Activity Participants – 2000

3.1 Market Size & Overlap With Other Activity Groups

The CTC identified several market segments generated from variables within the Travel Activities and Motivation Survey (TAMS) for special analysis. These include Hard and Soft Outdoor Adventure Enthusiasts, Wine and Culinary Enthusiasts, Alpine Skiers, Other Winter Activity Participants (non-alpine), Heritage Enthusiasts, Visual Arts Enthusiasts, and Performing Arts Enthusiasts (see Appendix for definition). The table below provides information on the total size of each of these market segments, the number who have travelled to a Canadian destination in the past couple of years and the degree of overlap within the Winter Outdoor Activity Participant segment.

Of the 23.3 million Canadian adults in 2000, about 3.6 million are Winter Outdoor Activity Participants (15%). Of these, close to 9-in-10 claim to have taken a leisure trip within Canada during the past two years or so. Thus, the domestic market for Canada's winter outdoor products is approximately 3.1 million adults.

Table 1: Canadian Winter Outdoor Activity Participants – Market Size & Comparisons With Other Segments

	Canadian Adults	Recent Leisure Travellers in Canada	
	Total	Total	Winter Outdoors
Adults 18+	*23.3 million*	*14.0 million*	*3.1 million*
Winter Outdoors	**3.6**	**3.1**	**3.1**
Soft Outdoor Adventure	5.3	4.4	2.0
Hard Outdoor Adventure	1.6	1.3	0.6
Wine/Culinary	1.8	1.5	0.4
Heritage	2.6	2.2	0.8
Performing Arts	1.3	1.1	0.4
Visual Arts	2.1	1.7	0.5
Alpine Skiing	2.8	2.4	1.0

Source: Special TAMS Tabulations, page 8-1. See Appendix for unweighted base sizes.

At 3.6 million, these Winter Outdoor Activity Participants represent the second-largest activity-based domestic market segment among those of special interest to the CTC, trailing only Soft Outdoor Adventure Enthusiasts (5.3 million). Winter outdoor sports participants are followed at a considerable distance by Heritage Enthusiasts (2.6 million), Visual Arts Enthusiasts (2.1 million), and at a greater distance, by Wine & Culinary Enthusiasts (1.8 million) and Performing Arts Enthusiasts (1.3 million).

The 3.1 million Winter Outdoor Activity Participants with recent Canadian leisure travel experiences have relatively narrow tourism interests. One-quarter are also Heritage Enthusiasts (753,000, or 25%), about one-seventh are Visual Arts Enthusiasts (454,000, or 15%), slightly fewer are Wine/Culinary Enthusiasts (421,000, or 14%) and one-eighth are Performing Arts Enthusiasts (365,000, or 12%). These overlaps suggest comparatively limited cross-market packaging and marketing opportunities for cultural experiences within the domestic Winter Outdoor Activity market. Many of these outdoor enthusiasts will also be found skiing on slopes – one-third of the "other" winter outdoor activity participants also claim to alpine ski and/or snowboard while on recent trips (1.0 million).

3.2 Where They Live & Where They Travel

Canadians from all parts of the country are represented in the Winter Outdoor Activity Participant segment and with some minor variations, mirror the adult population distribution of Canada as a whole. For example, 1-in-12 Canadians live in Atlantic Canada and the same proportion of Winter Outdoor Activity Participants live in these four provinces (8%). Quebec represents one-quarter of the Canadian adult population and a slightly higher proportion of outdoor enthusiasts (28%). Conversely, Ontario residents are slightly under-represented within the winter outdoor segment (33%) compared to their proportion of Canada as a whole (38%).

Table 2: Place of Residence of Canadian Winter Outdoor Activity Participants

	Canadian Adults	Recent Leisure Travellers in Canada	
	Total	Total	Winter Outdoors
Adults 18+	*23.3 million*	*14.0 million*	*3.1 million*
Atlantic Canada	8%	8%	8%
Quebec	25%	24%	28%
Montréal CMA	12%	11%	13%
Ontario	38%	35%	33%
Toronto CMA	16%	12%	9%
Manitoba/Saskatchewan	7%	8%	8%
Alberta	9%	11%	13%
British Columbia	13%	15%	10%
Vancouver CMA	7%	7%	5%

Source: Special TAMS Tabulations, pages 1; 26. Percentages may not add to 100 per cent due to rounding.
Note: Residents of the Territories were not included in the TAMS survey.

Manitoba and Saskatchewan residents are represented in the Winter Outdoor Activity Participant market on par with their share of the total population. A marginally higher proportion of these winter outdoor enthusiasts are from Alberta (13%) than would be expected based on Alberta's contribution to the total Canadian population (9%) whereas somewhat fewer are British Columbians (10%) than might be expected (13%).

The comparative under-representation of Ontario within the winter market segment is likely a result of the reluctance of residents of Canada's largest urban centre – Toronto Census Metropolitan Area (CMA) – to participate in winter outdoor activities when they travel. This city represents 16 per cent of Canada's adult population but only 9 per cent of the winter outdoor market segment. Residents of Montréal CMA and Vancouver CMA do not exhibit Torontonians' reluctance to embrace the outdoors on their winter travels.

Canadians in the winter outdoor market travel in Canada's regions in much the same way as does the travelling public at large. As such, they are most apt to have visited Ontario in the past couple of years (51%), followed by Quebec (42%), and less commonly, British Columbia (31%). 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 achieve the highest share of these winter outdoor tourists. Smaller numbers of Canadians live in Atlantic Canada, Alberta and Manitoba/Saskatchewan and, as a consequence, lower proportions of Winter Outdoor Activity Participants claim to have taken leisure trips to these destinations in the past couple of years: Atlantic Canada (20%), Alberta (27%) and Manitoba/Saskatchewan (17%) than is the case with the more populous provinces.

Table 3: Canadian Winter Outdoor Activity Participants – Destinations Visited in Past 2 Years

	Canadian Adults	Recent Leisure Travellers in Canada	
	Total	Total	Winter Outdoors
Adults 18+	*23.3 million*	*14.0 million*	*3.1 million*
Canadian Destinations	**60%**	**100%**	**100%**
Atlantic Canada	11%	18%	20%
Quebec	21%	36%	42%
Ontario	29%	48%	51%
Manitoba/Saskatchewan	9%	15%	17%
Alberta	14%	24%	27%
British Columbia	18%	30%	31%
Territories	1%	1%	3%
Other Destinations			
Any U.S.A. Destination	29%	36%	38%
Mexico/Caribbean	9%	9%	10%
U.K./Other Europe	8%	9%	11%
Other Countries	6%	6%	6%
Sun/Sea Destinations	20%	23%	22%
Any Locations Outside Canada (NET)	39%	45%	48%

Source: Special TAMS Tabulations, pages 2; 27. Percentages do not add to 100 per cent because of multiple destinations.

Some regions have particularly high "attraction rates" compared to others because they lure high levels of Winter Outdoor Activity Participants relative to their resident populations. Those that are especially successful in attracting Winter Outdoor Activity Participants over a two year period relative to their share of the Canadian adult population include Alberta (3.0) followed by Atlantic Canada (2.5), Manitoba/Saskatchewan (2.4) and British Columbia (2.4).

Ontario is the least successful province in attracting these outdoor tourists – this province represents 38 per cent of the country's adults and 51 per cent of winter outdoor enthusiasts, for an "attraction rate" of 1.3. Quebec falls between the high levels evident for Canada's eastern and western regions, representing 25 per cent of the adult population and attracting 42 per cent of Winter Outdoor Activity Participants over a two year period, for a 1.7 "attraction rate".

The U.S.A. is a strong competitor for travel within the winter outdoor activity segment. Almost 2-in-5 of these tourists say they have taken a leisure trips to the United States (38%) and almost one-quarter have gone to a sun/sea destination over the past couple of years (22%). Approximately half of them have travelled to any destination outside of Canada – including the U.S.A., Europe and other countries – over the past two years (48%).

3.3 Demographic Characteristics of Winter Outdoor Activity Participants

Winter Outdoor Activity Participants are somewhat more likely to be men (56%) than women (44%) and are concentrated at the younger end of the adult age spectrum. Two-thirds of them are between 18 and 44 years, with a higher proportion falling into the 18 to 34 year age group (38%) than in the 35 to 44 year age group (28%).

Table 4: Demographics of Canadian Winter Outdoor Activity Participants – Gender & Age

	Recent Leisure Travellers in Canada	
	Total	Winter Outdoors
Adults 18+	*14.0 million*	*3.1 million*
Men	48%	56%
Women	52%	44%
18 - 34 years	33%	38%
35 - 44 years	24%	28%
45 - 54 years	19%	16%
55 - 64 years	12%	10%
65+ years	13%	8%
Average Age	43.4 years	40.2 years

Source: Special TAMS Tabulations, pages 3-1; 28-1.

Compared to the total market for all leisure tourism experiences over the past couple of years, domestic Winter Outdoor Activity Participants are substantively under-represented among older Canadians, and especially among those over 65 years of age. Only 1-in-12 Winter Outdoor Activity Participants are at least 65 years of age (8%) compared to about 1-in-8 recent leisure travellers as a whole (13%). Under-representation at the older end of the age spectrum brings the average age of Winter Outdoor Activity Participants to about 40 years – appreciably below the 43 year average for domestic leisure tourists as a whole.

Winter Outdoor Activity Participants span the income and education spectrums, with almost two-fifths falling into a relatively low income group (38%, under $40,000) possibly because of the over-representation of young people in this market segment. About one-quarter claiming to have household incomes in the $40,000 to $60,000 range (26%); and about the same proportion between $60,000 to $100,000 (24%). Incomes in excess of $100,000 are characteristic of one-eighth of these outdoor enthusiasts (13%).

Table 5: Demographics of Canadian Winter Outdoor Activity Participants – Income & Education

	Recent Leisure Travellers in Canada	
	Total	Winter Outdoors
Adults 18+	*14.0 million*	*3.1 million*
Household Income		
Under $40,000	39%	38%
$40,000 - $59,999	26%	26%
$60,000 - $99,999	25%	24%
$100,000 or more	11%	13%
Average	$54,900	$55,800
Education		
Some Secondary or Less	14%	9%
Completed Secondary	26%	29%
Some Post Secondary	39%	41%
Graduated University	21%	20%

Source: Special TAMS Tabulations, pages 4, 5-2; 29,30-1/2.
Income is percentaged among those stating.

This income pattern is quite similar to all recent domestic leisure travellers. The average household income for the typical domestic leisure visitor in Canada is $54,900 and the average for the sub-group with a particular interest in the outdoors during the winter is $55,800.

Like income, levels of formal education are very similar between "typical" Canadian leisure travellers and those who engage in winter outdoor activities on their trips. Thus, one-fifth of Winter Outdoor Activity Participants have at least one university degree (20%) and a further 41 per cent have had some other form of post-secondary education.

Most Winter Outdoor Activity Participants live in adult-only households – those with no members under the age of eighteen. Only one-third are likely to be in the market for outdoor tourism experiences that take into account the interests and needs of teenagers or children (33%) and about one-quarter might be seeking outdoor winter experiences suitable for children under twelve years of age (24%).

Table 6: Demographics of Canadian Winter Outdoor Activity Participants – Household Composition

	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	WINTER OUTDOORS
Adults 18+	*14.0 million*	*3.1 million*
Adult Only	65%	67%
Any Teens/Children	35%	33%
Any Children under 12	26%	24%

Source: Special TAMS Tabulations, pages 6-2; 31-2.

Winter Outdoor Activity Participants are more likely to be Canadian-born (91%) than is the general domestic travelling public (85%) and than is the Canadian population at large (79%). The relative weakness of *new Canadians* within this outdoor-oriented market segment is noteworthy from a long term market demand perspective because Canada will be relying more heavily on immigration to sustain its population over the coming decades than it has in the past. Some of the possible implications of the relatively low level of interest in winter outdoor tourism experiences among new Canadians are explored in greater detail in the final chapter of this report.

Table 7: Demographics of Canadian Winter Outdoor Activity Participants – Place of Birth

	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	WINTER OUTDOORS
Adults 18+	*14.0 million*	*3.1 million*
Born In Canada	85%	91%
Born Outside Canada	15%	9%

Source: Special TAMS Tabulations, pages 7; 32.

3.4 Travel Activities Among Winter Outdoor Activity Participants

3.4.1 Winter Outdoor Activities

Of the activities used to define Winter Outdoor Activity Participants, cross-country skiing has the largest following, attracting almost half of these winter enthusiasts (47%). Snowmobiling, whether as day use on an organized trail (32%), or less commonly, as an overnight touring trip (13%) has been a leisure trip activity for just over 1-in-3 of these domestic tourists (35%, net). Ice fishing also attracts about 1-in-3 Winter Outdoor Activity Participants on recent trips (34%) while dog sledding (4%) and ice climbing (3%) remain *niche* activities, appealing to comparatively few Winter Outdoor Activity Participants.

Table 8: Canadian Winter Outdoor Activity Participants – Activities Used To Define Market Segment

	WINTER OUTDOORS
Adults 18+	*3.1 million*
Defining Activities	
Cross-county skiing	47%
Snowmobiling (net)	35%
Day use	32%
Overnight touring	13%
Ice fishing	34%
Dog sledding	4%
Ice climbing	3%
Other Winter Activities	
Downhill skiing	29%
Snowboarding	6%

Source: Special TAMS Tabulations, page 9.

Even though it is not used to define the Winter Outdoor Activity Participant segment, downhill skiing constitutes a trip activity for 3-in-10 of these Canadians and snowboarding attracts about 1-in-20.

3.4.2 Other Outdoor Activities

While on trips, over half of Canada's Winter Outdoor Activity Participants view wildlife and/or go fishing in fresh water and slightly fewer hike or backpack in wilderness settings while on trips. About two-fifths cycle, golf, and/or go motor boating – likely related to their enthusiasm for fishing – while on their holidays. One-third also view wildflowers and flora or go kayaking or canoeing, while about one-quarter go whale watching and/or bird watching. This wide array of popular outdoor activities on recent trips is suggestive of a market segment that enjoys the outdoors during *all seasons.*

In fact, at least as many of these winter enthusiasts claim to have been fishing, viewing wildlife, hiking or backpacking on trips in the past two years as say they had been cross country skiing or snowmobiling (see 3.4.1).

Table 9: Canadian Winter Outdoor Activity Participants – Other Outdoor Activities

	WINTER OUTDOORS
Adults 18+	*3.1 million*
Fishing -fresh water	54%
Wildlife viewing	53%
Hiking/backpacking in wilderness settings	49%
Cycling	42%
Golfing	38%
Motor boating	38%
Wildflowers / flora viewing	34%
Kayaking or canoeing	33%
Whale watching	27%
Bird watching	23%
Hunting	19%
Fishing - salt water	15%
White water rafting	13%
Sailing	11%

Source: Special TAMS Tabulations, pages 9-1/3.

3.4.3 Heritage Activities

As noted earlier, there is some overlap between the 3.1 million Winter Outdoor Activity Participants and the group of Canadian travellers who are defined as Heritage Enthusiasts. The heritage experiences that might prove most attractive to Winter Outdoor Activity Participants include farmers' fairs or markets, general history museums, as well as local festivals and fairs. These heritage experiences have attracted about two-fifths of winter-oriented Canadian travellers while on a trip in the past couple of years.

Table 10: Canadian Winter Outdoor Activity Participants – Heritage Activities

	WINTER OUTDOORS
Adults 18+	*3.1 million*
Farmers' fairs or markets	42%
General history museums	40%
Local festivals or fairs	38%
Science & tech museums	28%
Pick your own farms / harvesting	25%
Historical replicas of cities/towns	21%
Historic sites	20%
French Canadian cultural experiences	14%
Western theme events	14%
Pow Wow/other Aboriginal celebrations/attractions	12%
Children's museums	12%
Carnivals such as Caribana/ Mardi Gras or Rio's Carnival	6%

Source: Special TAMS Tabulations, page s 10-1/4

Other heritage attractions sought by between one-quarter and one-fifth of Winter Outdoor Activity Participants while on their travels include science and technology museums, "pick-your-own" farms, historic replicas of towns or cities and historic sites. There is limited interest in French Canadian cultural experiences, western theme events such as the Calgary Stampede, children's museums and Aboriginal celebrations, attractions and events among the winter outdoor segment.

3.4.4 Performing & Visual Arts Activities

With the exception of live theatre performances (32%), there is not a great deal of overlap between Winter Outdoor Activity Participants and activities that characterize domestic Performing Arts Enthusiasts when they travel (see figures, Table 11).

Table 11: Canadian Winter Outdoor Activity Participants – Performing & Visual Arts Activities

	WINTER OUTDOORS
Adults 18+	*3.1 million*
Performing Arts	
Theatre	32%
Music festivals	19%
Classical music concerts	14%
Ballet or other dance	12%
Theatre festivals	11%
Jazz music concerts	9%
Opera	9%
Literary festivals	6%
Musical attractions such as Jazzland	4%
Visual Arts	
Local arts & crafts studios	50%
Art galleries	25%
International film festivals	5%

Source: Special TAMS Tabulations, pages 10-1/5.

Conversely, shopping or browsing in local arts and crafts studios (50%) is fairly widely sought by Winter Outdoor Activity Participants while on their trips. This activity, included in the Visual Arts Enthusiast segment, might be paired with winter outdoor experiences to help attract outdoors-oriented travellers to destinations in Canada.

3.4.5 Other Attraction-Based Activities

Over two-fifths of those who travelled in Canada in the past couple of years and are Winter Outdoor Activity Participants claim to have gone to zoos while on trips in the recent past. Aquariums, botanical gardens and casinos, are also relatively common travel experiences among these winter enthusiasts, with one-third to one-quarter claiming to have been to these types of attractions on trips over the past two years or so.

Table 12: Canadian Winter Outdoor Activity Participants – Other Activities

	WINTER OUTDOORS
Adults 18+	*3.1 million*
Zoos	43%
Aquariums	33%
Botanical gardens	29%
Casinos	28%
Planetariums	18%
Auto races	15%
Horse races	13%

Source: Special TAMS Tabulations, pages 10-3/5.

Since many of these attractions are *indoors* they may provide welcome relief to Canadians on trips in which they spend time engaging in winter outdoor experiences.

3.5 Ratings of Canada

Winter Outdoor Activity Participants were asked to rate Canada on a variety of dimensions using a ten point bi-polar scale ranging from *agree completely* (10) to *disagree completely* (1). Average ratings are shown in the accompanying table and are based on those who volunteered a score for a particular dimension. The table also displays the proportion of Canadians in these winter enthusiasts who refrain from offering an opinion.

In this context, Canada is most highly rated by domestic Winter Outdoor Activity Participants for attributes that support an *outdoors* image:

- A place with beautiful scenery
- One of best destinations for outdoor activities
- A great place to relax and get away from it all
- A place with lots of things for families to see and do
- A great place for fishing
- A place with lots of things for mature adults to see and do
- One of best summer destinations
- A great place for hunting

This market segment also considers Canada to be a place that that offers *adventure and excitement*, is *safe for visitors*, is *clean and well cared for*, has *friendly people* and offers a lot for *young people to see and do*.

Less favourable ratings are accorded attributes associated with *shopping opportunities*, *respecting the natural environment*, a place to *experience other cultures* including Aboriginal culture, and *urban attractions*. Canadians in the winter outdoor activity segment are least positive about their country as a destination that offers *value for money*, or one with a *popular or trendy* image.

In light of their tourism interests, it would be expected that winter enthusiasts would have a favourable attitude toward Canada as a *winter destination* and they do. These winter travellers rate Canada significantly more favourably for its winter tourism experiences (8.1 on a ten point scale) than do Canadian travellers as a whole (7.5 on a ten point scale). Nonetheless, Winter Outdoor Activity Participants rate Canada significantly better as a *summer* destination (8.6 on a ten point scale) than as a place to go in the *winter*.

Table 13: Canadian Winter Outdoor Activity Participants – Attitudes Toward Canada

	Recent Leisure Travellers in Canada		
	Total	Winter Outdoors	
Adults 18+	*14.0 million*	*3.1 million*	
	Average #	Average #	Can't Rate %
Beautiful scenery	9.1	9.1	2%
One of best destinations for outdoor activities	8.7	8.9	3%
Great place to relax	8.6	8.8	2%
Lots for families	8.6	8.7	3%
Great place for fishing	8.5	8.7	12%
Lots for mature adults	8.5	8.6	9%
One of best summer destinations	8.4	8.6	3%
Great place for hunting	8.3	8.6	26%
Great place to experience adventure & excitement	8.1	8.5	6%
Safe for visitors	8.3	8.4	3%
Clean/well cared for	8.3	8.3	3%
Place with friendly people	8.2	8.3	3%
Lots for young adults	8.1	8.3	7%
Many cultural events & attractions	8.0	8.1	6%
One of best winter destinations	**7.5**	**8.1**	**4%**
Great place to see historic sites	8.0	8.0	4%
Place with interesting shops	7.8	8.0	8%
Great place to experience different cultures	7.7	7.9	8%
Respects natural environment	7.7	7.8	4%
Great place to experience city life	7.7	7.8	7%
Place for romance	7.4	7.7	11%
Great place for Aboriginal culture	7.5	7.6	17%
Great place to experience "good life"	7.4	7.6	11%
Offers excellent value for money	7.1	7.4	4%
Popular, trendy place	6.8	7.1	12%

Source: Special TAMS Tabulations, page 14. Average ratings are based on those rating Canada on a ten point bi-polar scale ranging from 10 "agree completely" to 1 "disagree completely".

3.6 Ways to Reach Winter Outdoor Activity Participants

There are several measures within TAMS that may help marketers reach Winter Outdoor Activity Participants with their messages:

- Print media read on a regular basis;
- Television programs viewed regularly; and
- Club and association memberships.

Canadians in the winter outdoor market segment are avid local newspaper readers. Furthermore, about two-fifths of them claim to read the travel section of weekday editions of daily newspapers on a regular basis and almost half claim to read or look through the travel section of the weekend editions of a local newspaper.

Table 14: Canadian Winter Outdoor Activity Participants – Print Media Read Regularly

	WINTER OUTDOORS
Adults 18+	*3.1 million*
Daily Newspaper (Any)	**84%**
Weekday edition	76%
Travel section of weekday edition	45%
Weekend edition	73%
Travel section of weekend edition	49%
Community newspapers	79%
Any Magazines	**90%**
News magazines	46%
Hobby magazines	43%
Canadian or National Geographic	40%
Travel magazines	37%
Fashion/homemaking magazines	35%
Sports magazines	31%
General interest/city life magazines	21%

Source: Special TAMS Tabulations, page 15.

They may be avid magazine readers (90%), but only about one-third read travel magazines on a regular basis. Somewhat more claim to read hobby magazines (43%) or Canadian Geographic regularly (40%).

Daily and weekend newspapers may have better reach among Winter Outdoor Activity Participants than does any particular type of television programming. Close to 8-in-10 of these tourists say they watch televised movies on a regular basis and approximately two-thirds claim to watch evening sitcoms and/or nature shows regularly. The early evening news, instructional or hobby shows, evening dramas, the late evening news and sports telecasts are viewed on a regular basis by at least half of domestic Winter Outdoor Activity Participants.

Table 15: Canadian Winter Outdoor Activity Participants – Television Programs Viewed Regularly

	WINTER OUTDOORS
Adults 18+	*3.1 million*
Movies	78%
Nature shows	68%
Evening sitcoms	66%
Early evening news	61%
Instructional/hobby shows	58%
Evening drama	57%
Late evening news	54%
Professional sports	54%
Morning news	31%
Daytime programs on weekdays	23%

Source: Special TAMS Tabulations, page 17.

With the exception of automobile associations such as the CAA (32%) and sports clubs (28%), Winter Outdoor Activity Participants in Canada are not *joiners.*

One-third of them are, however, attendees at sportsmen’s shows and slightly fewer claim to go to RV/camper shows, or boat shows on a regular basis. These venues may prove to be important marketing channels to get information about Canada’s winter outdoors products to domestic Winter Outdoor Activity Participants.

Table 16: Canadian Winter Outdoor Activity Participants – Club/Organization Memberships & Consumer Trade Show Attendance

	WINTER OUTDOORS
Adults 18+	*3.1 million*
Club/Organization Membership	
Auto club	32%
Sports club	28%
Nature organization	14%
Art gallery/museum	3%
Zoo/botanical garden	2%
Gardening club	1%
Regular Attendance at Travel/Trade Shows	
Sportsmen's shows	34%
RV/Camper shows	29%
Boat shows	29%
Travel shows	15%

Source: Special TAMS Tabulations, pages 18/19.

4. Projections to 2026

4.1 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. When this population increase is applied to the TAMS data, estimates of market size and characteristics in 2026 can be estimated, assuming that people in various age, gender and regional groups behave in 2026 as they did in 2000.

Because the population will not grow at the same rate among all age groups or in all regions of Canada, tourism businesses and marketers should anticipate and prepare for changes in travel activities and interests in the domestic market over the next two decades. In this chapter, some important structural shifts are described for Canada as a whole. Subsequently, expected change in the domestic winter outdoors market is discussed.

4.2 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 included in this section.

Sample Table

Canada's Adult Population – Gender and 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.

Percentage 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).

Percentage 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.

4.3 Regional Changes in the Canadian Market

The adult population in different parts of the country will change at different rates, with Atlantic Canada and Quebec experiencing the *lowest* growth rate (8% each) and British Columbia (49%) and Ontario (37%), followed by Alberta (33%) experiencing the highest growth rates. Manitoba and Saskatchewan will experience growth at a level that is substantively below the national average (14% versus 27%).

Quebec and Atlantic Canada will increase in population over the next two decades but they will do so at a rate of growth that is about two-thirds *lower* than would have occurred if the population structure of 2000 were to remain intact through 2026. In contrast, British Columbia will grow at a rate that is appreciably *higher* than would have been predicted based on today's population structure (81% higher).

Table 17: Regional Shifts in Canadian Adult Population

Adults 18+ in millions	Canadian Adult Population In . . . 2000	2026	Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
Total Canada	**23.3**	**29.6**	**27%**	
Atlantic Canada	1.8	2.0	8%	-69%
Quebec	5.8	6.2	8%	-70%
Montréal	2.7	3.7	38%	42%
Ontario	8.9	12.2	37%	35%
Toronto	3.6	6.1	70%	156%
Manitoba/Saskatchewan	1.6	1.8	14%	-49%
Alberta	2.2	2.9	33%	22%
British Columbia	3.0	4.5	49%	81%
Vancouver	1.5	2.4	57%	108%

Source: Special TAMS Canada Tabulations, Table 5.

Ontario residents will represent over two-fifths of all adult Canadians by 2026, experiencing a growth rate of 37 per cent – a rate that is approximately one-third higher than would be predicted based on the population structure of 2000. Since Ontarians tend to be under-represented within the domestic winter outdoors segment, the high growth rate predicted for this province may pose challenges down the road for tourism businesses who cater to outdoors-oriented Canadians during the winter.

Of particular note in projections of Canada's population growth is the increasing *urbanization* of the country.

- Even though Quebec's total population will grow from 2000 to 2026 by only eight percent, Montréal CMA's population is expected to grow at over four times this rate (38%), from about 2.7 million adults to 3.7 million.
- Growth for the Toronto CMA is expected to be even more meteoric – the adult population of this city is expected to grow from 3.6 million to 6.1 million in 2026, for a growth rate of 70 per cent – almost twice the provincial average (37%) or 1.5 times higher than would be expected given today's population structure (156%).
- Vancouver CMA will also grow at a rate (57%) that is higher than the rate predicted for the province (49%), from 1.5 million in 2000 to 2.4 million in 2026.

As Canada becomes increasingly urbanized, it may become a growing challenge to lure city residents to the outdoors . . . not only because city dwellers may have somewhat less comfort with the natural environment than those who grow up in it, but also because Canada's major cities will act as reception centres for most of Canada's new immigrants. As noted earlier, these new Canadians are appreciably less likely to be Winter Outdoor Activity Participants than are their counterparts who were born in Canada.

4.4 Demographic Changes in the Canadian Market

Changes to the demographic profile of Canadians over time are apt to have an especially dramatic impact on Canada's tourism volume and value, and the types of activities the domestic market will seek on its travels.

4.4.1 Gender & Age

There will be a noticeable decline in the proportion of the population that is young or middle-aged, and a substantive increase in the proportion that is older.

- The 18 to 34 year old age group will decline from 1-in-3 to 1-in-4 adult Canadians by 2026;
- Canadians in their "family" years (35 – 44) will fall from over 1-in-5 members of the adult population to about 1-in-6;
- Middle-aged Canadians (45 – 54) will come close to holding steady as a proportion of the total population, from 18 per cent in 2000 to 16 per cent in 2026;
- Starting at about age 55, the pattern shifts with older people representing *higher* proportions of Canada's adult population in 2026 than they do now. The increase is most prominent among Canadians 65 years of age or older. This older group currently represents about one-sixth of the adult population but by 2026 it is expected to represent over one-quarter.
- In absolute numbers, the young adult population (18 – 34 years) will shift from 7,252,000 to 7,286,000 between 2000 and 2026. This young cohort is growing at a rate that is 98 per cent lower than would have been expected if the structure of the population had remained constant between 2000 and 2026. Thus, the impact of changes in the population mix in Canada will reduce the growth rate of the younger age segment substantively. A similar finding is evident for other younger and middle-aged cohorts. In the case of the "family market", not only is the growth rate much lower than would be expected based on today's population structure, but there will be a decrease in the absolute numbers of Canadians in the 35 to 44 year age bracket – from 5,313,000 in 2000 to 4,960,000 in 2026.

As noted above, the trend reverses in the older age groups. In fact, the oldest segment of the population – adults who are at least 65 years of age – will represent close to twice as many Canadians by 2026 as they do now, or 7.7 million instead of the current 3.7 million.

Table 18: Canadian 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.

4.4.2 Household Income & Education

The proportion of Canadian adults with household incomes in various groups from *low* to *high income* are not expected to change substantively between now and 2026. Nonetheless, reflecting the increase in new Canadians and in the number of Canadians no longer in the labour force, *low income* Canadians will grow at a higher rate (37%) than will the population as a whole (27%).

As the youth market declines, the number of young people who are still in secondary school will also decline. Apart from this substantive change, a slightly higher proportion of Canada's adult population will have some post-secondary education or a university diploma in 2026 than they have now.

Table 19: Canadian Adult Population – Household Income & Education

	% 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*	*27%*	
Household Income				
Low Income	47%	51%	37%	36%
Low - Middle	23%	22%	19%	-30%
Middle – High	21%	19%	15%	-46%
High Income	9%	8%	15%	-46%
Education				
Some Secondary or Less	20%	11%	-29%	-206%
Completed Secondary	26%	28%	37%	34%
Some Post Secondary	36%	40%	44%	62%
Graduated University	18%	20%	42%	54%

Source: Special TAMS Canada Tabulations, Table 3. Repercentaged on total stating income. Incomes are expressed in 1998 dollars.

4.4.3 Household Composition

The 2026 age mix of Canadians will have a substantive impact on the types of activities they are interested in pursuing on their travels because as they age, they will become more concentrated in adult-only households. The family market – households in which there are children twelve years of age or younger – will decline from 1-in-3 in 20000 to 1-in-4 by 2026. Conversely, those who live in adult-only households (no children or teenagers) will increase from 66 per cent to 74 per cent.

Table 20: Canadian Adult Population – Household Composition

	% 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*		
Adult Only	66%	74%	42%	54%
Any Teens/Children	33%	26%	-2%	-107%
Any Children under 12	25%	19%	-1%	-105%

Source: Special TAMS Canada Tabulations, Table 4. Percentages may not add to 100 per cent due to rounding and/or duplication across categories.

4.4.4 Place of Birth

Assuming present immigration policies, the proportion of Canadian adults who will have to come Canada from other countries will reach 28 per cent in 2026 from the current 21 per cent. As noted earlier, Canada's major cities will be the reception centres for many of the country's new residents. By 2026, over half of Toronto's population will be new immigrants to Canada (54%). The same scenario will be in place for Vancouver (53%). An appreciably lower proportion of the Montréal population will be new Canadians by 2026 (28%) but this proportion is noticeably higher than the current level (20%). As noted elsewhere in this report, increases in the proportion of *new Canadians* over the next two decades will likely pose special challenges for the winter outdoors market segment.

Table 21: Canadian Adult Population – Place of Birth

	% 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*		
Born in Canada	79%	72%	16%	-39%
Born Outside Canada	21%	28%	66%	144%

Source: Special TAMS Canada Special Tabulations.

4.5 Destination Choices

Over the next two decades, Canadians will continue to take leisure trips in Canada but will be increasingly drawn to destinations outside the country. In part because of increasing numbers of immigrants who travel to their country of origin and in part because the aging population will seek respite from Canada's winter, destinations in the U.S.A., Europe and other foreign countries will see increases in the proportion of Canadian tourists. Thus, as the population ages between 2000 and 2026, retention of Canadians for Canadian destinations will become an increasing challenge.

**Table 22: Canadian Adult Population –
Destinations Visited on Leisure Trips in Past Couple of Years**

	% 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*		
Canada	60%	59%	24%	-10%
U.S.A.	29%	32%	40%	47%
Sun/Sea Destinations	20%	21%	37%	36%
Mexico/Caribbean	8%	8%	27%	0%
U.K./Europe	8%	10%	59%	118%
Other Countries	6%	8%	60%	121%

Source: Special TAMS Canada. Tabulations, Tables 24 - 31.

4.6 Winter Outdoor Activity Participants

As noted in the demographic profile section of this report, the Winter Outdoors Activity market tends to attract comparatively young travellers. Older Canadians, and particularly those over 65 years of age, are substantively under-represented in this segment.

Because the Canadian population will shift over the next two decades to an older one, the very characteristics that define Winter Outdoor Activity Participants help explain why growth in this market is predicted to be 47 per cent **lower** than would have been expected given today's population structure. The total domestic winter outdoors market is predicted to grow from 3.6 million in 2000 to 4.1 million by 2026.

A similar pattern is evident for changes in the winter outdoors market segment that takes leisure trips within Canada. This population is expected to increase from 3.1 million now to 3.4 million in 2026. At 11 per cent, this growth rate is about 61 per cent **lower** than would have been expected given today's population structure.

For purposes of contrast, the table also displays predicted growth rates for other key CTC activity-based market segments. Clearly, segments such as Heritage Enthusiasts, Performing Arts Enthusiasts and Wine/Culinary Enthusiasts – segments that involve little physical exertion – will grow at much higher rates than those such as winter outdoor activity participants. These differences undoubtedly reflect the needs and interests of an aging Canadian population.

Table 23: Canadian Adult Population – High Intensity Activity Groups

	% 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%	
Winter Outdoors Activity Participants	3.6	4.1	14%	-47%
Winter Outdoors Activity Participants Who Take Leisure Trips in Canada	**3.1**	**3.4**	**11%**	**-61%**
Other CTC Activity Groups - Leisure Trips in Canada				
Alpine Skiing	2.4	2.6	9%	-67%
Soft Outdoor Adventure Enthusiasts	4.4	4.8	9%	-66%
Hard Outdoor Adventure Enthusiasts	1.3	1.4	9%	-60%
Heritage Enthusiasts	2.2	3.0	37%	36%
Performing Arts Enthusiasts	1.1	1.5	44%	61%
Visual Arts Enthusiasts	1.7	2.4	39%	43%
Wine/Culinary Enthusiasts	1.5	2.0	36%	32%

Source: Special TAMS Canada. Special Calculations

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 Caribana; 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

Table A-1: Activity-Based Market Segments: Unweighted Base Sizes From the Canada TAMS Mailback Questionnaire

	UNWEIGHTED RECORDS – MAILBACK
Adult Leisure Travellers in Canada in the Past 2 Years	4,272
Soft Outdoor Adventure Enthusiasts	1,241
Hard Outdoor Adventure Enthusiasts	361
Wine/Culinary Enthusiasts	454
Heritage Enthusiasts	762
Performing Arts Enthusiasts	331
Visual Arts Enthusiasts	608
Winter Outdoors (excluding alpine skiing)	**844**
Alpine Skiing	651

Source: Special TAMS Canada 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.

5.3 Attraction Rates

Table A-2: Attraction Rates

	Proportion of Canadian Adult Population	Proportion of Winter Outdoor Participants Visiting . . . Region	Attraction Rate
Atlantic Canada	8%	20%	2.5
Quebec	25%	42%	1.7
Ontario	38%	51%	1.3
Manitoba/Saskatchewan	7%	17%	2.4
Alberta	9%	27%	3.0
British Columbia	13%	31%	2.4

Source: Special TAMS Canada Tabulations, special calculations.
Note: Proportion of segment visitors to Canada's regions will add to more than 100 per cent because of visits to multiple provinces over the two-year reporting period.

5.4 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