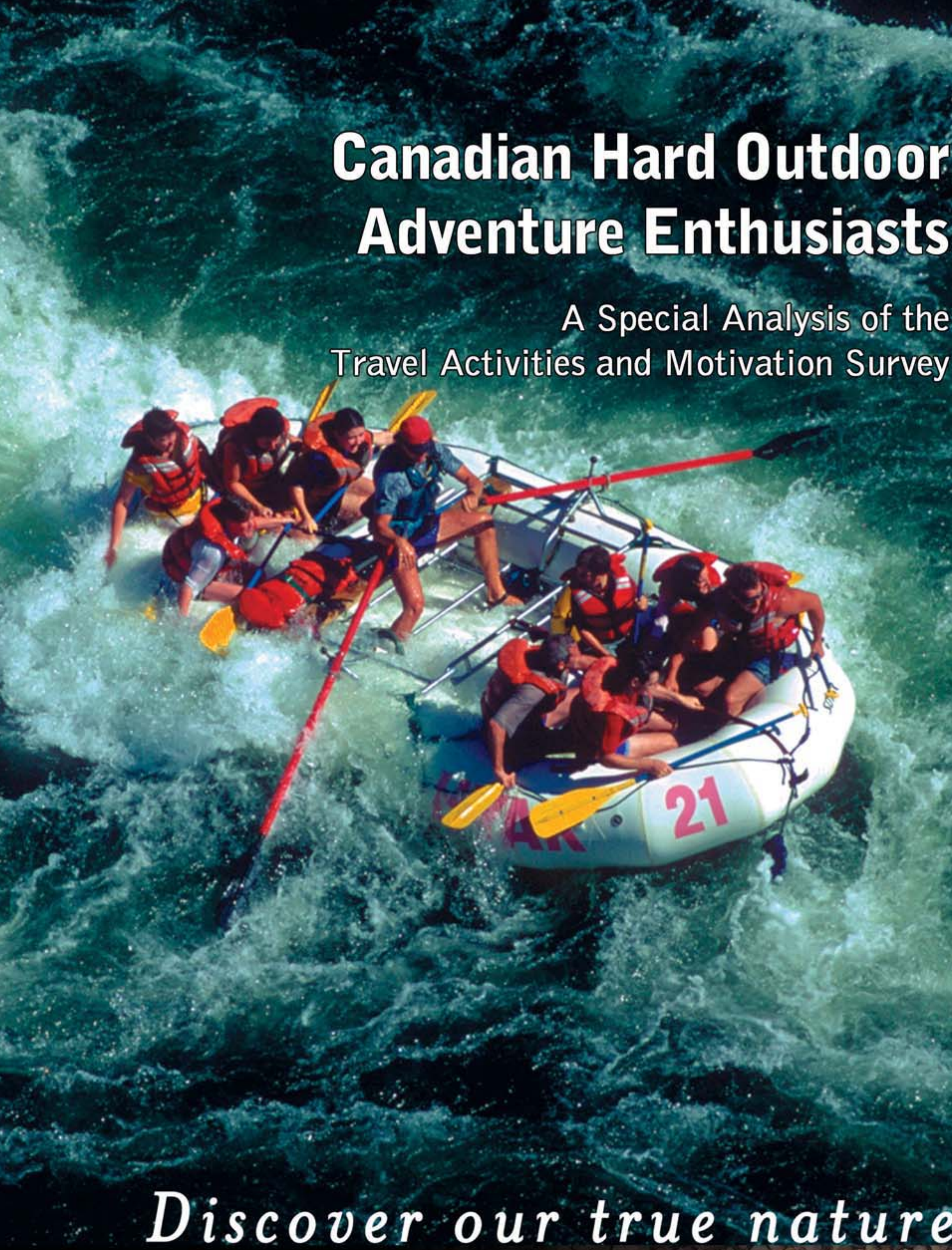
Canadian Hard Outdoor Adventure Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey



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Canada

Canadian Hard Outdoor Adventure Enthusiasts

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:

Canadian hard outdoor adventure enthusiasts

Issued also in French under title: Touristes canadiens adeptes de
l'aventure de plein air dure.
"A special analysis of the Travel Activities and Motivation
Survey (TAMS)".
ISBN 0-662-33874-X
Cat. no. C86-159/2003E

1. Adventure and adventurers–Canada.
2. Ecotourism–Canada.
3. Tourism–Canada.
I. Canadian Tourism Commission.
II. Research Resolutions & Consulting Ltd.

G155.C3C32 2003 338.4'7917104648 C2003-902135-1

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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 **Hard Outdoor Adventure Enthusiasts** – Canadians who have taken leisure trips in Canada and exhibit a particular interest in hard outdoor adventure. As such, they have taken leisure trips in Canada and, in many cases, to other destinations in the past couple of years, have taken at least one trip *to experience adventure and excitement* and have included at least one of the following activities on these trips.

- ice climbing
- rock climbing
- mountain biking
- dog sledding
- white water rafting
- hang gliding
- bungee jumping
- heli-skiing
- scuba diving

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

In addition to a *current* profile of Hard Outdoor Adventure Enthusiasts, 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. The final chapter of this report is devoted to the impacts of population changes on the domestic Hard Outdoor Adventure Enthusiast 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 Adventure Enthusiasts, Visual Arts, and Performing Arts Enthusiasts, Heritage Enthusiasts, Wine and Culinary Enthusiasts, and Winter Outdoor Activity Participants.

2. Executive Summary

2.1 Hard Outdoor Adventure Enthusiasts: Market Size

Of the 23.3 million Canadian adults in 2000, about 1.6 million are Hard Outdoor Adventure Enthusiasts (7%). Of these, about 8-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 hard outdoor adventure products is approximately 1.3 million adults.

Canadians from all parts of the country are represented in the Hard Outdoor Adventure Enthusiast segment but there is a decided *western* enthusiasm for energetic engagements with the outdoors and a pronounced *lack* of enthusiasm for hard outdoor adventure among Quebeckers.

For example, almost 1-in-10 Canadians live in Alberta (9%) but residents of Alberta are twice as likely to be Hard Outdoor Adventure Enthusiasts (18%) as their share of the total adult population would suggest. British Columbia represents about 1-in-8 adult Canadians (13%), but close to 1-in-5 outdoor enthusiasts (19%). In contrast, Quebeckers account for 1-in-4 Canadian adults (25%) but only about 1-in-10 Hard Outdoor Adventure Enthusiasts (11%).

Hard Outdoor Adventure Enthusiasts travel to other parts of Canada in much the same way as does the Canadian travelling public as a whole. As such, they are most apt to have visited Ontario in the past couple of years (55%). Quebec is also a comparatively popular destination (37%), although it trails British Columbia (47%) among these outdoor enthusiasts.

Provinces that are especially successful in attracting Hard Outdoor Adventure Enthusiasts over a two year period relative to their share of the Canadian adult population include British Columbia (3.6) and Alberta (3.3). Ontario is the least successful province in attracting these tourists – this province represents 38 per cent of the country's adults and attracts 55 per cent of hard outdoor enthusiasts, for an "attraction rate" of 1.5. Quebec also falls well below western provinces in its attraction for Hard Outdoor Adventure Enthusiasts. This province represents 25 per cent of the adult population and attracts 37 per cent of these enthusiasts over a two year period, for a 1.5 "attraction rate".

2.2 Hard Outdoor Adventure Enthusiasts: Demographic Characteristics

Hard Outdoor Adventure Enthusiasts are twice as likely to be men (67%) as they are to be women (33%). They are heavily concentrated at the younger end of the adult age spectrum with close to three-fifths falling into the 18 to 34 year age group (58%). A further 3-in-10 are between 35 and 44 years, but few are 45 years of age or older (14%).

The majority of Hard Outdoor Adventure Enthusiasts live in adult-only households (69%). Because of their relative youth, these outdoor-oriented tourists are somewhat less likely than the "typical" domestic tourist to have children under 12 years of age in their households (31%).

Hard Outdoor Adventure Enthusiasts are also more affluent than is the "typical" domestic traveller in Canada, with an average household income of $59,900 compared to $54,900 for the typical leisure visitor in Canada (1998 dollars). Higher household incomes are consistent with higher levels of formal education: over one-fifth of Hard Outdoor Adventure Enthusiasts have at least one university degree (22%) and a further half (49)% have had some other form of post-secondary education.

2.3 Outdoor Activities among Hard Outdoor Adventure Enthusiasts

By definition, Hard Outdoor Adventure Enthusiasts have taken an overnight trip in the past couple of years in order to *experience adventure and excitement* and have participated in at least one high energy outdoor activity 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 mountain biking, followed at some distance by rock climbing, scuba diving and white water rafting.

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

- Mountain biking (58%)
- Rock climbing (34%)
- Scuba diving (25%)
- White water rafting (21%)
- Ice climbing (6%)
- Dog sledding (6%)
- Bungee jumping (3%)
- Hang gliding (1%)
- Heli skiing (less than 0.5%)

Outdoor activities such as ice climbing, dog sledding, bungee jumping and hang gliding are comparatively rare, even among the youthful and energetic Hard Outdoor Enthusiast market segment.

Even though they are not used to define the this market segment, other winter and summer sporting activities are very popular among Hard Outdoor Adventure Enthusiasts. Over half of these Hard Outdoor Adventure Enthusiasts hike or backpack in wilderness settings, view wildlife, engage in recreational biking or go kayaking or canoeing while on trips. Just under half go downhill skiing or fishing. About one-third golf and/or view wildflowers and flora.   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 outdoor enthusiasts go to museums, zoos, aquariums, farmers fairs or markets, live theatre performances, and art galleries on their trips. Since these attractions tend to be *indoors*, they may provide welcome relief from the elements for Canadians on trips in which they spend time engaging in rugged summer and winter outdoor experiences.

2.4 Overlap With Other Activity-Based Segments

Canadian Hard Outdoor Adventure Enthusiasts with recent leisure travel experiences in their own country have relatively narrow tourism interests. Fewer than one-third are also Heritage Enthusiasts (30%), about one-quarter are also Visual Arts Enthusiasts (26%), and approximately one-fifth are Wine/Culinary Enthusiasts (20%) or Performing Arts Enthusiasts (19%).

2.5 Image Challenges & Media Sources

Canada is most highly rated by Hard Outdoor Adventure Enthusiasts for attributes that support an *active* and *outdoors* image:

- A place with beautiful scenery
- One of the 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 to go for fishing
- A place with lots of things for mature adults to see and do
- One of the best summer destinations
- A great place to experience adventure and excitement

This market segment also considers Canada to be a place that is very *clean and well cared for*, is *safe* for visitors, has *friendly people*, and has a lot for *young people* to see and do. Among those who offer a rating, Canada is also viewed as being a great place for *hunting*. Canadian Hard Outdoor Adventure Enthusiasts are also favourable in their appraisals of Canada for its *cultural and heritage attractions*.

Less favourable ratings are accorded attributes associated with *shopping opportunities*, *respecting the natural environment*, as a *winter destination*, *cultural diversity*, *urban attractions*, *romance*, the *"good life"*, and *value for money*. Canadian Hard Outdoor Adventure Enthusiasts are least positive about Canada as a destination with a *popular or trendy image*.

On many dimensions, Hard Outdoor Adventure Enthusiasts have impressions of Canada that are significantly higher than those offered by *all* Canadians with recent travel experience in Canada. The enthusiastic ratings offered by this young market segment suggests that direct encounters with Canada's rugged terrains and outdoor adventures generates a positive impression of their own land.

Image building and product awareness messages to Hard Outdoor Adventure Enthusiasts 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). These media outlets have the greatest potential for reaching Hard Outdoor Adventure Enthusiasts among those measured in the survey. Boat, sportsmen's and RV/camper shows might also be useful marketing venues for Hard Outdoor Adventure Enthusiasts since between 2-in-10 and 3-in-10 members of this segment claim to frequent these consumer trade shows on a regular basis.

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 Hard Outdoor Adventure Enthusiasts 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 Hard Outdoor Adventure Enthusiasts

There will be an increase in the absolute number of Canadians who will be in the market for hard outdoor adventure activities between 2000 and 2026, from an estimated 1.6 million now to about 1.7 million in 2026. Canada's likely share of this market – those who will seek outdoor adventures and take leisure trips within Canada – is also expected to grow by a modest amount, from 1.3 million to 1.4 million.

These growth rates are *lower* than the population growth rate of Canada as a whole, primarily because hard outdoor adventure activities tend to appeal to younger people. 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 hard outdoor adventure – 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.

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 and a corresponding shift toward non-strenuous *warm weather* outdoor activities and indoor cultural events and attractions.

2.8 Summary

The domestic Hard Outdoors Adventure Enthusiast market for Canada is characterized by its relative youth, affluence and appeal to men.

Outdoor activities with the greatest appeal to these tourists are those pursued during the *warm weather months* – mountain biking, hiking/backpacking, wildlife viewing, fishing, canoeing or kayaking, rock climbing and scuba diving. About half of these outdoor adventurers are, however, on the alpine slopes in the *winter*.

Of the market segments of special interest to the CTC, domestic Hard Outdoors Adventure Enthusiasts currently represent the smallest pool of potential visitors for Canada's outdoor-oriented tourism businesses – 1.6 million adult Canadians. Of these Canadians, just over 8-in-10 have taken recent leisure trips in Canada (1.3 million), leaving some opportunity for growth.

Retention of the Hard Outdoor Adventure Enthusiast segment will become increasingly difficult as the Canadian population becomes more highly urbanized, and most particularly, 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 Hard Outdoor Adventure Enthusiast segment. For example, the industry may have to provide outdoor products 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.

3. Canadian Hard Outdoor Adventure Enthusiasts – 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 definitions). 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 Hard Outdoor Adventure Enthusiast segment.

Of the 23.3 million Canadian adults in 2000, about 1.6 million are Hard Outdoor Adventure Enthusiasts (7%). Of these, about 8-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 hard outdoor adventure products is approximately 1.3 million adults.

Table 1: Canadian Hard Outdoor Adventure Enthusiasts – Market Size & Comparisons With Other Segments

	Canadian Adults	Recent Leisure Travellers in Canada	
	Total	Total	Hard Outdoor Enthusiasts
Adults 18+	*23.3 million*	*14.0 million*	*1.3 million*
Hard Outdoor Adventure	**1.6**	**1.3**	**1.3**
Soft Outdoor Adventure	5.3	4.4	N/A
Wine/Culinary	1.8	1.5	0.3
Heritage	2.6	2.2	0.4
Performing Arts	1.3	1.1	0.3
Visual Arts	2.1	1.7	0.3
Winter Outdoors (excluding alpine skiing)	3.6	3.1	0.6
Alpine Skiing	2.8	2.4	0.6

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".

At 1.6 million, these Hard Outdoor Adventure Enthusiasts are among the smallest activity-based domestic market segment among those of special interest to the CTC. They are surpassed at a considerable distance by Soft Outdoor Adventure Enthusiasts (5.3 million), Heritage Enthusiasts (2.6 million), and Visual Arts Enthusiasts (2.1 million). By definition, the high intensity outdoor activity group includes many of the Canadians who engage in winter outdoor activities apart from alpine skiing (Winter Outdoor, 3.6 million) and those who go alpine skiing or boarding (Alpine Skiing, 2.8).

The 1.3 million Hard Outdoor Adventure Enthusiasts with recent Canadian leisure travel experiences have relatively narrow tourism interests. Approximately 3-in-10 are also Heritage Enthusiasts (386,000) and/or Visual Arts Enthusiasts (340,000) while about 2-in-10 are Wine/Culinary Enthusiasts (256,000) and/or Performing Arts Enthusiasts (253,000). These overlaps suggest comparatively limited cross-market packaging and marketing opportunities within the domestic Hard Outdoor Adventure Enthusiast market.

3.2 Where They Live & Where They Travel

Canadians from all parts of the country are represented in the Hard Outdoor Adventure Enthusiast segment but there is a decided *western* enthusiasm for energetic engagements with the outdoors and a pronounced *lack* of enthusiasm for hard outdoor adventure among Quebeckers. For example, almost 1-in-10 Canadians live in Alberta (9%) but residents of Alberta are twice as likely to be Hard Outdoor Adventure Enthusiasts (18%) as their share of the total adult population would suggest. British Columbia represents about 1-in-8 adult Canadians (13%), but close to 1-in-5 outdoor enthusiasts (19%).

Table 2: Place of Residence of Canadian Hard Outdoor Adventure Enthusiasts

	Canadian Adults	Recent Leisure Travellers in Canada	
	Total	Total	Hard Outdoor Enthusiasts
Adults 18+	*23.3 million*	*14.0 million*	*1.3 million*
Atlantic Canada	8%	8%	5%
Quebec	25%	24%	11%
Montréal CMA	12%	11%	5%
Ontario	38%	35%	41%
Toronto CMA	16%	12%	18%
Manitoba/Saskatchewan	7%	8%	6%
Alberta	9%	11%	18%
British Columbia	13%	15%	19%
Vancouver CMA	7%	7%	11%

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.

In contrast, Quebeckers account for 1-in-4 Canadian adults (25%) but only about 1-in-10 Hard Outdoor Adventure Enthusiasts (11%). Ontario residents are represented among outdoor enthusiasts (41%) at about the same rate as they are in the population as a whole (38%).

The comparative over-representation of British Columbians within the Hard Outdoor Adventure Enthusiast market segment is, in part, a result of the special enthusiasm for *adventure and excitement* evident among residents of Vancouver. This city represents 7 per cent of Canadians but 11 per cent of Hard Outdoor Adventure Enthusiasts. Residents of Canada's two other major metropolitan areas – Toronto CMA and Montréal CMA – do not exhibit this same willingness to embrace the outdoors on their travels. In fact, Montréalers are especially *unenthusiastic* about vigorous encounters with the outdoors while on their recent travels.

In view of the fact that Canadians in the Hard Outdoor Adventure Enthusiast market segment are over-represented among residents of Alberta and British Columbia, it is not surprising that these domestic tourists are more likely to take trips to these western provinces than is Canada's travelling public at large.

Specifically, 3-in-10 Canadian adult travellers claim to have been to a B.C. destination on a leisure trip in the past couple of years whereas almost 5-in-10 Hard Outdoor Adventure Enthusiasts claim to have done so. Similarly, although on smaller scale, 1-in-4 Canadian leisure travellers say that they have visited Alberta recently but almost 1-in-3 outdoor enthusiasts have been to Alberta over the past couple of years.

Hard Outdoor Adventure Enthusiasts travel to other parts of Canada in much the same way as does the Canadian travelling public as a whole. As such, they are most apt to have visited Ontario in the past couple of years (55%). Quebec is also a comparatively popular destination (37%), although it trails British Columbia (47%) among these outdoor enthusiasts.

Table 3: Canadian Hard Outdoor Adventure Enthusiasts – Destinations Visited in Past 2 Years

	CANADIAN ADULTS	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	TOTAL	HARD OUTDOOR ENTHUSIASTS
Adults 18+	*23.3 million*	*14.0 million*	*1.3 million*
Canadian Destinations	**60%**	**100%**	**100%**
Atlantic Canada	11%	18%	18%
Quebec	21%	36%	37%
Ontario	29%	48%	55%
Manitoba/Saskatchewan	9%	15%	17%
Alberta	14%	24%	30%
British Columbia	18%	30%	47%
Territories	1%	1%	2%
Other Destinations			
Any U.S.A. Destination	29%	36%	47%
Mexico/Caribbean	9%	9%	18%
U.K./Other Europe	8%	9%	15%
Other Countries	6%	6%	11%
Sun/Sea Destinations	20%	23%	32%
Any Locations Outside Canada (NET)	39%	45%	61%

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

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 Hard Outdoor Adventure Enthusiasts. Comparatively few Hard Outdoor Adventure Enthusiasts claim to have taken leisure trips to Atlantic Canada (18%) and Manitoba/Saskatchewan (17%) in the past couple of years.

Some regions can be said to have particularly high "attraction rates" compared to others because they lure high levels of a particular market segment relative to their resident populations. Provinces that are especially successful in attracting Hard Outdoor Adventure Enthusiasts over a two year period relative to their share of the Canadian adult population include British Columbia (3.6) and Alberta (3.3).

Ontario is the least successful province in attracting these tourists – this province represents 38 per cent of the country's adults and attracts 55 per cent of hard outdoor enthusiasts, for an "attraction rate" of 1.5. Quebec also falls well below western provinces in its attraction for Hard Outdoor Adventure Enthusiasts. This province represents 25 per cent of the adult population and attracts 37 per cent of these enthusiasts over a two year period, for a 1.5 "attraction rate".

All *foreign* destinations have strong appeal within the Hard Outdoor Adventure Enthusiast segment. Almost 1-in-2 of these tourists say they have taken a leisure trip to the United States (47%) and almost one-third have gone to a sun/sea destination over the past couple of years (32%). Europe attracts about one-seventh and other countries attract about one-tenth. Approximately three-fifths of these outdoor adventurers have travelled to any destination outside of Canada – including the U.S.A., Europe and other countries – over the past two years (61%). This level of *outbound* travel is noticeably higher than is evident among Canadian travellers as a whole (45%), suggesting that Canada may be challenged to attract these outdoor enthusiasts to Canadian destinations.

3.3 Demographic Characteristics of Hard Outdoor Adventure Enthusiasts

Hard Outdoor Adventure Enthusiasts are twice as likely to be men (67%) as they are to be women (33%). They are heavily concentrated at the younger end of the adult age spectrum with close to three-fifths falling into the 18 to 34 year age group (58%). A further 3-in-10 are between 35 and 44 years, but few are 45 years of age or older (14%).

Table 4: Demographics of Canadian Hard Outdoor Adventure Enthusiasts – Gender & Age

	Recent Leisure Travellers in Canada	
	Total	Hard Outdoor Enthusiasts
Adults 18+	*14.0 million*	*1.3 million*
Men	48%	67%
Women	52%	33%
18 - 34 years	33%	58%
35 - 44 years	24%	29%
45 - 54 years	19%	10%
55 - 64 years	12%	3%
65+ years	13%	1%
Average Age	43.4 years	33.4 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 Hard Outdoor Adventure Enthusiasts are substantively under-represented among older Canadians, and especially among those over 55 years of age. Only 1-in-25 Hard Outdoor Adventure Enthusiasts are at least 55 years of age (4%) compared to 1-in-4 recent leisure travellers as a whole (25%). Over-representation at the younger end of the age spectrum and under-representation at the older end brings the average age of Hard Outdoor Adventure Enthusiasts to about 33 years -- well below the 43 year average for domestic leisure tourists as a whole.

Hard Outdoor Adventure Enthusiasts span the income and education spectrums, with over one-third falling into a relatively low income group (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 (23%) or between $60,000 to $100,000 (25%). Incomes in excess of $100,000 are characteristic of one-seventh of these outdoor enthusiasts (17%).

Table 5: Demographics of Canadian Hard Outdoor Adventure Enthusiasts – Income & Education

	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	HARD OUTDOOR ENTHUSIASTS
Adults 18+	*14.0 million*	*1.3 million*
Household Income		
Under $40,000	39%	36%
$40,000 - $59,999	26%	23%
$60,000 - $99,999	25%	25%
$100,000 or more	11%	17%
Average	$54,900	$59,900
Education		
Some Secondary or Less	14%	5%
Completed Secondary	26%	21%
Some Post Secondary	39%	49%
Graduated University	21%	22%

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, although there are somewhat more high income Canadians in the Hard Outdoor Adventure Enthusiast segment than among domestic travellers as a whole. 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 "rugged" outdoors is $59,900.

Higher household incomes are consistent with higher levels of formal education: one-fifth of Hard Outdoor Adventure Enthusiasts have at least one university degree (22%) and a further one-half have had some other form of post-secondary education (49%).

Most Hard Outdoor Adventure Enthusiasts live in adult-only households – those with no members under the age of eighteen. Fewer than 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 (31%). While adult-only households predominate among Hard Outdoor Adventure Enthusiasts (69%), one-fifth of these Canadians live in households with children under twelve years of age (22%).

Table 6: Demographics of Canadian Hard Outdoor Adventure Enthusiasts – Household Composition

	Recent Leisure Travellers in Canada	
	Total	Hard Outdoor Enthusiasts
Adults 18+	*14.0 million*	*1.3 million*
Adult Only	65%	69%
Any Teens/Children	35%	31%
Any Children under 12	26%	22%

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

Hard Outdoor Adventure Enthusiasts are as likely to be Canadian-born (85%) as is the general domestic travelling public (85%), but are more likely to have been born in the country than is the Canadian population at large (79%).

Table 7: Demographics of Canadian Hard Outdoor Adventure Enthusiasts – Place of Birth

	Recent Leisure Travellers in Canada	
	Total	Hard Outdoor Enthusiasts
Adults 18+	*14.0 million*	*1.3 million*
Born In Canada	85%	85%
Born Outside Canada	15%	15%

Source: Special TAMS Tabulations, pages 7; 32.

3.4 Travel Activities Among Hard Outdoor Adventure Enthusiasts

3.4.1 Hard Outdoor Adventure Activities

Of the activities used to define Hard Outdoor Adventure Enthusiasts, mountain biking has the largest following, attracting almost three-fifths of these outdoor enthusiasts (58%). Rock climbing has been a leisure trip activity for just over 1-in-3 of these domestic tourists (34%), 1-in-4 have gone scuba diving and 1-in-5 have been white water rafting on recent trips (21%).

Table 8: Canadian Hard Outdoor Adventure Enthusiasts – Activities Used To Define Market Segment

	HARD OUTDOOR ENTHUSIASTS
Adults 18+	*1.3 million*
Mountain biking	58%
Rock Climbing	34%
Scuba diving	25%
White water rafting	21%
Ice Climbing	6%
Dog sledding	6%
Bungee jumping	3%
Hang gliding	1%
Heli skiing	*

*Source: Special TAMS Tabulations, page 9. *Less than 0.5 per cent.*

Adventurous or niche *winter* sports including ice climbing, dog sledding and heli-skiing are appreciably less popular among Hard Outdoor Adventure Enthusiasts than are warmer weather outdoor pursuits.

3.4.2 Other Outdoor Activities

When on trips, at least half of Hard Outdoor Adventure Enthusiasts hike or backpack in wilderness settings (61%), view wildlife (59%), engage in recreational cycling (57%) and/or go kayaking or canoeing (55%). Just under half go alpine skiing (45%) on their travels while fishing in fresh water and motor-boating (likely related to their enthusiasm for fishing) is characteristic of about 4-in-10 of these outdoor enthusiasts.

Table 9: Canadian Hard Outdoor Adventure Enthusiasts – Other Outdoor Activities

	HARD OUTDOOR ENTHUSIASTS
Adults 18+	*1.3 million*
Hiking/backpacking in wilderness settings	61%
Wildlife viewing	59%
Recreational cycling	57%
Kayaking or canoeing	55%
Downhill skiing	45%
Fishing - fresh water	43%
Motor boating	40%
Golfing	37%
Wildflowers / flora viewing	36%
Cross country skiing	28%
Whale watching	26%
Bird watching	18%
Sailing	17%
Snowmobiling	13%
Snow boarding	13%
Fishing - salt water	13%
Wind surfing	11%
Hunting	10%
Parachuting	5%

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

Approximately 1-in-3 golf and/or view wildflowers while on trips. A more passive activity such as whale watching attracts about one-quarter while bird watching appeals to less than one-fifth. This wide array of popular outdoor activities on recent trips is suggestive of a market segment that enjoys the outdoors during *all seasons.*

3.4.3 Heritage Activities

As noted earlier, there is some overlap between the 1.3 million Hard Outdoor Adventure Enthusiasts and the group of Canadian travellers who are defined as Heritage Enthusiasts. The heritage experiences that might prove most attractive to Hard Outdoor Adventure Enthusiasts include general history museums, farmers' fairs or markets, science and technology museums as well as local festivals and fairs. These heritage experiences have attracted at least one-third of the Hard Outdoor Adventure Enthusiast segment while on a trip in the past couple of years.

Table 10: Canadian Hard Outdoor Adventure Enthusiasts – Heritage Activities

	HARD OUTDOOR ENTHUSIASTS
Adults 18+	*1.3 million*
General history museums	46%
Farmers' fairs or markets	40%
Science & tech museums	35%
Local festivals or fairs	34%
Pick your own farms / harvesting	21%
Historic sites	20%
French Canadian cultural experiences	19%
Pow Wow/other Aboriginal celebrations/attractions	19%
Historical replicas of cities/towns	17%
Western theme events	14%
Children's museums	12%
Carnivals such as Caribana/ Mardi Gras or Rio's Carnival	7%

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

Other heritage attractions comparatively widely sought by Hard Outdoor Adventure Enthusiasts while on their travels include "pick-your-own" farms, historic sites, French Canadian and/or Aboriginal celebrations, attractions and events.

3.4.4 Performing & Visual Arts Activities

With the exception of live theatre performances (39%), there is not a great deal of overlap between Hard Outdoor Adventure Enthusiasts and activities that characterize domestic Performing Arts Enthusiasts when they travel.

Table 11: Canadian Hard Outdoor Adventure Enthusiasts – Performing & Visual Arts Activities

	HARD OUTDOOR ENTHUSIASTS
Adults 18+	*1.3 million*
Performing Arts	
Theatre	39%
Music festivals	23%
Theatre festivals	20%
Ballet or other dance	20%
Classical music concerts	16%
Opera	14%
Jazz music concerts	13%
Literary festivals	10%
Musical attractions such as Jazzland	5%
Visual Arts	
Local arts & crafts studios	60%
Art galleries	41%
International film festivals	8%

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

Conversely, shopping or browsing in local arts and crafts studios (60%) is fairly widely sought by Hard Outdoor Adventure Enthusiasts while on their trips. This activity, included in the Visual Arts Enthusiast segment, might be paired with rugged outdoor experiences to help attract outdoors-oriented travellers to destinations in Canada.

3.4.5 Other Attraction-Based Activities

Close to one-half of those who travelled in Canada in the past couple of years and are Hard Outdoor Adventure Enthusiasts claim to have gone to zoos while on trips in the recent past and somewhat fewer have gone to aquariums. Botanical gardens attract about one-third of this market segment while casinos form part of the attraction mix for just over one-quarter of these tourists on trips over the past two years or so.

Table 12: Canadian Hard Outdoor Adventure Enthusiasts – Other Activities

	HARD OUTDOOR ENTHUSIASTS
Adults 18+	*1.3 million*
Zoos	46%
Aquariums	42%
Botanical gardens	34%
Casinos	27%
Planetariums	21%
Auto races	13%
Horse races	12%

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

3.5 Ratings of Canada

Hard Outdoor Adventure Enthusiasts 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 the Hard Outdoor Adventure Enthusiast segment who refrain from offering an opinion.

In this context, Canada is most highly rated by domestic Hard Outdoor Adventure Enthusiasts 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 to experience adventure and excitement
- A place with lots of things for young people to see and do
- A place that is very safe for visitors
- A place with friendly people

This market segment also considers Canada to be a place that is *good for hunting* (although a sizeable minority refrains from rating Canada on this dimension), is *clean and well cared for,* has many *cultural events and attractions*, is a great place to experience *Aboriginal culture* and *city life* and is one of the best *winter destinations.*

Less favourable ratings are accorded attributes associated with *shopping opportunities, respecting the natural environment*, and *value for money*. Canadians in the Hard Outdoor Adventure Enthusiast segment are least positive about their country as a destination with a *popular or trendy image.*

One might have expected outdoor-oriented characteristics to be more enthusiastically rated by those who seek outdoor adventure activities than by the "typical" domestic tourist and this is clearly the case. In fact, on many dimensions, Hard Outdoor Adventure Enthusiasts have impressions of Canada that are significantly higher than those offered by *all* Canadians with recent travel experience in Canada. These findings suggest that direct encounters with Canada's rugged terrains and outdoor adventures may build favourable impressions of their own country among young Canadians.

Table 13: Canadian Hard Outdoor Adventure Enthusiasts – Attitudes Toward Canada

	Recent Leisure Travellers in Canada		
	Total	Hard Outdoor Enthusiasts	
Adults 18+	*14.0 million*	*4.4 million*	
	Average #	Average #	Can't Rate %
Beautiful scenery	9.1	9.4	*
One of best destinations for outdoor activities	8.7	9.2	1%
Great place to relax	8.6	8.9	1%
Lots for families	8.6	8.9	2%
Great place for fishing	8.5	8.8	12%
Lots for mature adults	8.5	8.7	5%
One of best summer destinations	8.4	8.6	1%
Great place to experience adventure & excitement	8.1	8.6	2%
Great place for hunting	8.3	8.5	30%
Lots for young adults	8.1	8.5	5%
Safe for visitors	8.3	8.4	1%
Place with friendly people	8.2	8.4	*
Clean/well cared for	8.3	8.3	*
Many cultural events & attractions	8.0	8.3	3%
Great place for Aboriginal culture	7.5	8.1	12%
Great place to experience city life	7.7	8.0	4%
One of best winter destinations	7.5	8.0	1%
Great place to see historic sites	8.0	7.9	4%
Place with interesting shops	7.8	7.9	5%
Respects natural environment	7.7	7.8	2%
Great place to experience different cultures	7.7	7.8	3%
Place for romance	7.4	7.7	8%
Great place to experience "good life"	7.4	7.6	8%
Offers excellent value for money	7.1	7.4	2%
Popular, trendy place	6.8	7.0	11%

*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". *Less than 0.5 per cent.*

3.6 Ways to Reach Hard Outdoor Adventure Enthusiasts

There are several measures within TAMS that may help marketers reach Hard Outdoor Adventure Enthusiasts with their messages:

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

Canadians in the Hard Outdoor Adventure Enthusiast segment are avid local newspaper readers. Furthermore, about half of them claim to read the travel section of weekday editions of daily newspapers on a regular basis and about the same proportion claims to read or look through the travel section of the weekend editions of a local newspaper.

Table 14: Canadian Hard Outdoor Adventure Enthusiasts – Print Media Read Regularly

	HARD OUTDOOR ENTHUSIASTS
Adults 18+	*1.3 million*
Daily Newspaper (Any)	**85%**
Weekday edition	79%
Travel section of weekday edition	52%
Weekend edition	76%
Travel section of weekend edition	52%
Community newspapers	70%
Any Magazines	**90%**
News magazines	50%
Travel magazines	45%
Canadian or National Geographic	44%
Sports magazines	38%
Hobby magazines	38%
Fashion/homemaking magazines	26%
General interest/city life magazines	25%

Source: Special TAMS Tabulations, page 15.

They may be avid magazine readers (90%), but fewer than one-half read travel magazines on a regular basis. The same proportion claims to read Canadian Geographic regularly (44%).

Daily and weekend newspapers may have better reach among Hard Outdoor Adventure Enthusiasts than does any particular type of television programming. Close to 3-in-4 of these tourists say they watch televised movies on a regular basis and about the same proportion say they watch evening sitcoms regularly. Nature shows and professional sports broadcasts are popular with about 3-in-5 of these outdoor tourists. At least one-half also claim to watch the early evening news and/or evening dramas on a regular basis.

Table 15: Canadian Hard Outdoor Adventure Enthusiasts – Television Programs Viewed Regularly

	HARD OUTDOOR ENTHUSIASTS
Adults 18+	*1.3 million*
Movies	74%
Evening sitcoms	71%
Nature shows	61%
Professional sports	57%
Early evening news	55%
Evening drama	55%
Instructional/hobby shows	45%
Late evening news	45%
Morning news	21%
Daytime programs on weekdays	17%

Source: Special TAMS Tabulations, page 17.

With the exception of sports clubs (47%) and an automobile association such as the CAA (35%), Hard Outdoor Adventure Enthusiasts in Canada are not *joiners.*

Table 16: Canadian Hard Outdoor Adventure Enthusiasts – Club/Organization Memberships & Consumer Trade Show Attendance

	HARD OUTDOOR ENTHUSIASTS
Adults 18+	*1.3 million*
Club/Organization Membership	
Sports club	47%
Auto club	35%
Nature organization	17%
Art gallery/museum	4%
Zoo/botanical garden	2%
Gardening club	*
Regular Attendance at Travel/ Trade Shows	
Boat shows	30%
Sportsmen's shows	25%
RV/Camper shows	23%
Travel shows	21%

Source: Special TAMS Tabulations, pages 18/19.
**Less than 0.5%.*

Almost one-third of them are, however, attendees at boat shows. Approximately one-quarter to one-fifth claim to go to sportsmen's shows, RV/camper shows or consumer travel shows on a regular basis. These venues may prove to be important marketing channels to get information about Canada's rugged outdoors products to domestic Hard Outdoor Adventure Enthusiasts.

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 Hard Outdoor Adventure Enthusiast 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 & 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). Since Hard Outdoor Adventure Enthusiasts are *over-represented* among British Columbians now, there is reason to anticipate that this market segment will remain relatively robust, assuming that the growth in B.C. is not primarily generated by the migration of older Canadians to or of new immigration.

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.

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 who may not be as interested in rugged encounters with the outdoors as are those born and raised in or next to Canada's outdoors.

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.

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.

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.

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%). Increases in the proportion of *new Canadians* over the next two decades could pose special challenges for the Hard Outdoor Adventure Enthusiast 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 Hard Outdoor Adventure Enthusiasts

As noted in the demographic profile section of this report, the Hard Outdoor Adventure Enthusiast market segment tends to attract comparatively young travellers and those with no children living in the household. Canadians over 55 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 Hard Outdoor Adventure Enthusiasts help explain why growth in this market is predicted to be 66 per cent **lower** than would have been expected given today's population structure. The total domestic Hard Outdoor Adventure Enthusiast market is predicted to grow from 1.6 million in 2000 to 1.7 million by 2026.

A similar pattern is evident for changes in the Hard Outdoor Adventure Enthusiast segment that takes leisure trips within Canada. This population is expected to increase from 1.3 million now to 1.4 million in 2026. At 9 per cent, this growth rate is about 66 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 Hard Outdoor Adventure Enthusiasts. These differences undoubtedly reflect the needs and interests of an aging Canadian population.

Table 23: Canadian Adult Population – High Intensity Activity Groups

Adults 18+ in millions	% of Adult Population In . . . 2000	2026	Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
Total Canadian Adult Population	23.3	29.6	27%	
Total Hard Outdoor Adventure Enthusiasts	1.6	1.7	11%	-66%
Hard Outdoor Adventure Enthusiasts Who Take Leisure Trips in Canada	**1.3**	**1.4**	**9%**	**-66%**
Other CTC Activity Groups - Leisure Trips in Canada				
Soft Outdoor Adventure Enthusiasts	4.4	4.8	9%	-66%
Alpine Skiing	2.4	2.6	9%	-67%
Other Winter Outdoors	3.1	3.4	11%	-61%
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 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

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 HARD OUTDOOR ADVENTURE ENTHUSIASTS VISITING . . . REGION	ATTRACTION RATE
Atlantic Canada	8%	18%	2.3
Quebec	25%	37%	1.5
Ontario	38%	55%	1.5
Manitoba/Saskatchewan	7%	17%	2.4
Alberta	9%	30%	3.3
British Columbia	13%	47%	3.6

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