

CANADIAN TRAVEL MARKET

Boating & Swimming While on Trips Of One or More Nights

A Profile Report

October 18, 2007

Prepared by Lang Research Inc. on behalf of:

Ontario Ministry of Tourism, Ontario Tourism Marketing Partnership Corporation, Quebec Ministry of Tourism,
Travel Manitoba, Canadian Tourism Commission, Tourism Saskatchewan, Atlantic Canada Tourism
Partnership, Alberta Tourism, Parks, Recreation and Culture, Department of Canadian Heritage, Tourism British
Columbia, Parks Canada Agency, Government of Yukon, Government of Northwest Territories



Boating & Swimming While on Trips

Executive Summary

Over the last two years, 30.6% (7,579,543) of adult Canadians went boating and swimming while on an out-of-town, overnight trip of one or more nights. Boating and swimming was the third most common outdoor activity undertaken by Canadian Pleasure Travellers while traveling in the past two years. Swimming in lakes (26.2%) was the most popular activity, followed by motorboating (13.4%) and waterskiing (4.1%). 2.5% (613,306) of adult Canadians participated in all three activities when on trips in the past two years. Of those who went swimming or boating, 27.2% (2,063,351) reported that this activity was the main reason for taking at least one trip.

Boaters and swimmers tend to be younger than the average Canadian Pleasure Traveller and are over-represented among Young Singles, Young Couples and Mature Families (i.e., those with teenage children). This activity segment is moderately affluent with an above-average level of education (33.3% have a university degree – ranked 13th of 21 outdoor activity types) and household incomes (\$78,007 ranked 12th of 21 outdoor activity types). They are well-represented in all regions of Canada.

Boaters and swimmers tend to travel primarily within their own province or region (93.4%). They were the 16th most likely to have taken a trip to an adjacent province or region (54.6%) and 19th most likely of the 21 outdoor activity types to have travelled to a non-adjacent province or region (33.5%). They were the 16th most likely to have travelled to the United States (54.3%), but more likely than the average Canadian Pleasure Traveller to have visited Mexico (14.8%) and the Caribbean (17.9%).

While traveling, boaters and swimmers were highly active in family-oriented activities (e.g., sports & games, horseback riding), other water-based activities (e.g., sailing & surfing, fresh water scuba & snorkeling) and strenuous, outdoor activities (e.g., downhill skiing & snowboarding, cycling). They were also more likely than average to attend sporting events (e.g., amateur tournaments, professional sporting events), musical concerts, festivals and attractions and theme parks and exhibits. They tend to stay at public and private campgrounds or at lakeside or riverside resorts. Boaters and swimmers seek vacation destinations with many activities for adults and children that are both relaxing and provide an escape from their day-to-day environment.

Boaters and swimmers are moderate users of the Internet plan (68.8%) and book (43.2%) travel. They are more likely than average to use official travel information sources (e.g. guides & brochures, visitor information centres, websites) and can also be effectively targeted through sports-related media and family-related media.

Travel Activity and Motivation Survey (TAMS)

The TAMS survey examines the recreational activities and travel habits of Canadians and Americans. The survey examines out-of-town, overnight travel behaviour of one or more nights over the past two years and provides detailed information on Travellers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

TAMS represents a comprehensive assessment of travel behaviour and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada. In particular, TAMS was designed to:

- Identify existing and potential tourism markets;
- Measure the likelihood of these tourism markets being attracted to vacation experiences in Canada;
- Create packaging opportunities for each of these markets;
- Determine how to reach these markets (i.e., in terms of media strategies); and
- Provide information on how to fine-tune and target existing marketing campaigns.

TAMS was sponsored by the following organizations:

Ontario Ministry of Tourism	Quebec Ministry of Tourism
Ontario Tourism Marketing Partnership Corporation	Travel Manitoba
Canadian Tourism Commission	Tourism Saskatchewan
Atlantic Canada Tourism Partnership	Parks Canada Agency
Department of Canadian Heritage	Tourism British Columbia
Alberta Tourism, Parks, Recreation and Culture	Government of Yukon
Government of Northwest Territories	Statistics Canada

The survey was conducted in Canada and the United States between January 2006 and June 2006 and it includes only adults (18 years and over). The reference period for the data is 2004 and 2005.

The Canadian database is used in this current report. This survey was conducted by Statistics Canada. 31,699 completed questionnaires were returned. The data have been weighted to project the results to the Canadian population.

This report profiles persons who went swimming or boating while on a trip and compares them with other Canadian Pleasure Travellers (i.e., those who took at least one pleasure trip or vacation in the last two years). This report is part of a series of 44 Activity Reports prepared using the Canadian TAMS database.

Boating & Swimming While on Trips

Market Incidence

Over the last two years, 30.6% (7,579,543) of adult Canadians went boating or swimming while on an out-of-town, overnight trip of one or more nights. Boating and swimming was the third most common outdoor activity undertaken by Canadian Pleasure Travellers while traveling in the past two years. Swimming in lakes (26.2%) was the most popular activity, followed by motorboating (13.4%) and water skiing (4.1%). 2.5% (613,306) of adult Canadians participated in all three boating and swimming activities while on trips during the past two years. Of those who went boating and swimming, 27.2% (2,063,351) reported that this activity was the main reason for taking at least one trip in the past two years. Boating and swimming ranked 13th out of the 21 outdoor activity types as the main reason for taking at least one trip.

Fig. 1 Incidence of Boating & swimming While on Trips¹

Size of Market	Number of Swimmers & Boaters ²	Percent Main Reason for Trip ³	Percent of Pleasure Travellers ⁴	Percent of Total Canadian Population ⁵
Boating & swimming (All Activities)	7,579,543	27.2%	41.1%	30.6%
Swimming in lakes	6,495,356	25.3%	35.2%	26.2%
Motorboating	3,319,688	21.6%	18.0%	13.4%
Water skiing	1,026,078	16.4%	5.6%	4.1%
Participated in all three activities	613,306	10.7%	3.3%	2.5%

- 1 - "Trips" are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.
- 2 - "Swimmers & Boaters" are defined as individuals who went swimming or boating while on an out-of-town, overnight trip of one or more nights during the past two years and who took at least one out-of-town pleasure trip of one or more nights during the past two years. This column reports the number of individuals who participated in the activity on at least one trip during the last two years.
- 3 - This column reports the percent who participated in each activity who stated that the activity was the main reason for taking at least one trip during the past two years.
- 4 - "Pleasure Travellers" are defined as individuals who have taken at least one out-of-town pleasure trip of one or more nights in the last two years. This column reports the percent of Pleasure Travellers who participated in each activity on at least one trip during the last two years.
- 5 - This column reports the percent of the Total Canadian Adult Market who participated in each activity on a trip during the past two years.

Incidence by Region

Boaters and swimmers are well-represented in all regions of Canada. However, they are somewhat less likely to live in the Atlantic Provinces.

Fig. 2 Geographic Distribution of Those Who Went Boating & swimming While on Trips

	Total Population	Estimated Number Who Went Boating & swimming on a Trip	Percent of Pleasure Travellers in Region Who Went Boating & swimming on a Trip	Percent of Total Regional Population Who Went Boating & swimming on a Trip
Canada	24,776,103	7,579,543	41.1%	30.6%
Atlantic Provinces	1,822,494	318,494	25.1%	17.5%
Quebec	5,940,869	1,603,427	38.2%	27.0%
Ontario	9,671,592	3,196,412	44.6%	33.0%
Manitoba	843,107	267,861	45.0%	31.8%
Saskatchewan	706,325	231,082	42.7%	32.7%
Alberta	2,465,540	908,296	45.3%	36.8%
British Columbia	3,326,176	1,053,970	39.6%	31.7%

Demographic Profile

Boaters and swimmers tend to be younger than the average Canadian Pleasure Traveller and are over-represented among Young Singles, Young Couples and Mature Families. Boaters and swimmers are moderately affluent with an above-average level of education (33.3% have a university degree – ranked 13th of the 21 outdoor activity types) and household incomes (\$78,007 ranked 12th of 21 outdoor activity types).

Fig. 3 Demographic Profile of Swimmers & Boaters Relative to All Canadian Pleasure Travellers

		Swimmers & Boaters	Non-Swimmers & Boaters ¹	Pleasure Travellers	Index ²
Attribute	Size of Market	7,579,543	10,859,966	18,439,508	100
Gender	Male	49.5%	48.3%	48.8%	101
	Female	50.5%	51.7%	51.2%	99
Age of Respondent	18 to 24	17.0%	9.9%	12.8%	133
	25 to 34	22.3%	17.2%	19.3%	115
	35 to 44	24.4%	17.9%	20.5%	119
	45 to 54	18.8%	21.4%	20.3%	92
	55 to 64	10.6%	16.6%	14.1%	75
	65 Plus	6.9%	17.1%	12.9%	54
Average Age		40.6	47.3	44.5	N/A
Marital Status	Not married	32.3%	32.2%	32.2%	100
	Married	67.7%	67.8%	67.8%	100
Parental Status	No children under 18	65.4%	75.0%	71.1%	92
	Children under 18	34.6%	25.0%	28.9%	120
Education	High school or less	31.4%	39.6%	36.2%	87
	Some post-secondary	12.3%	10.4%	11.2%	110
	Post-secondary diploma/certificate	23.0%	21.1%	21.9%	105
	University degree	33.3%	28.9%	30.7%	108
Household Income	Under \$20,000	4.9%	6.3%	5.7%	86
	\$20,000 to \$39,999	11.5%	16.6%	14.5%	79
	\$40,000 to \$59,999	15.3%	17.4%	16.5%	92
	\$60,000 to \$79,999	15.6%	15.0%	15.2%	102
	\$80,000 to \$99,999	13.9%	11.1%	12.2%	114
	\$100,000 or more	27.1%	19.8%	22.8%	119
	Not stated	11.8%	13.9%	13.0%	90
Average Household Income		\$78,007	\$69,127	\$72,829	N/A

- 1 - "Non-Swimmers & Boaters" are defined as individuals who took at least one out-of-town, overnight pleasure trip of one or more nights in the last two years but did not go swimming or boating on any trip. The number of Swimmers & Boaters and Non-Swimmers & Boaters equals the number of Pleasure Travellers.
- 2 - The "Index" is calculated by dividing the percent for Swimmers & Boaters in each group by the percent of Pleasure Travellers in each group. The Index indicates the extent to which Swimmers & Boaters are over or under-represented relative to the average Pleasure Traveller. An index of 100 means the percent participating in the activity is the same as that of the average Canadian Pleasure Traveller. Index values over 100 indicate that those participating in the activity are over-represented relative to the average Canadian Pleasure Traveller. Index values less than 100 indicate that those participating in the activity are under-represented relative to the average Canadian Pleasure Traveller.

Travel Activity (During Last Two Years)

Boaters and swimmers tend to travel primarily within their own province or region (93.4%). They were the 16th most likely to have taken a trip to an adjacent province or region (54.6%) and the 19th most likely of the 21 outdoor activity types to have travelled to a non-adjacent province or region (33.5%).

They were the 16th most likely of the 21 outdoor activity types to have travelled to the United States (54.3%), the 14th most likely to have visited Mexico (14.8%) and the 12th most likely to have visited the Caribbean (17.9%).

Fig. 4 Percent Traveling Within Canada and to Other Destinations during Past Two Years

	Swimmers & Boaters	Non-Swimmers & Boaters	Pleasure Travellers	Index
Size of Market	7,579,543	10,859,966	18,439,508	100
Canada	98.2%	92.3%	94.8%	104
Took a trip within own province / region	93.4%	80.6%	85.9%	109
Took a trip to an adjacent province / region	54.6%	44.3%	48.6%	113
Took a trip to non-adjacent province / region	33.5%	30.0%	31.4%	106
Newfoundland and Labrador	3.9%	4.6%	4.3%	90
Prince Edward Island	6.7%	7.5%	7.2%	94
New Brunswick	11.2%	12.2%	11.8%	95
Nova Scotia	11.6%	13.5%	12.7%	91
Quebec	41.7%	37.0%	38.9%	107
Ontario	60.8%	48.4%	53.5%	114
Manitoba	11.3%	7.6%	9.2%	124
Saskatchewan	13.9%	9.7%	11.4%	121
Alberta	30.5%	22.6%	25.8%	118
British Columbia	35.2%	27.4%	30.6%	115
Yukon	1.3%	0.8%	1.0%	126
Northwest Territories	0.8%	0.6%	0.7%	114
Nunavut	0.3%	0.3%	0.3%	112
United States	54.3%	48.1%	50.7%	107
Mexico	14.8%	10.7%	12.4%	120
Caribbean	17.9%	14.0%	15.6%	115
All other destinations	23.9%	23.5%	23.6%	101

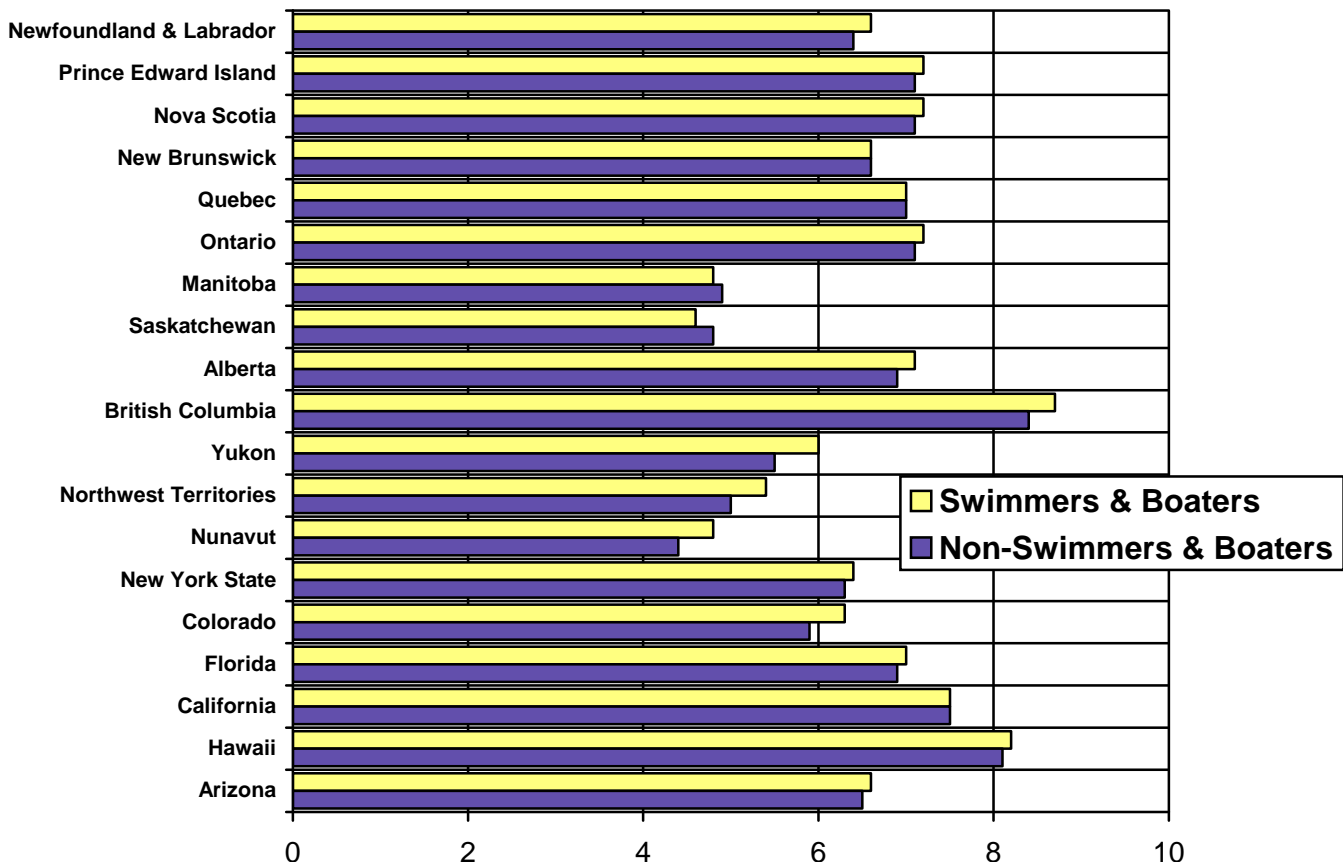
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

The respondents were asked to rate the appeal of each of Canada's provinces and territories on a ten-point appeal scale where "10" is "Very Appealing" and "1" is "Very Unappealing". They were also asked to rate selected U.S. states (New York State, Colorado, Florida, California, Hawaii and Arizona) to provide a frame of reference.

Overall, the appeal ratings of boaters and swimmers were comparable to those of Non-Boaters and swimmers for most Canadian destinations. British Columbia (8.7) was rated as the most appealing destination followed by Nova Scotia, Prince Edward Island and Ontario (all 7.2). The Yukon, Northwest Territories and Nunavut received slightly higher appeal ratings from Boaters and swimmers than from Non-Boaters and swimmers.

The U.S. reference states had similar appeal to both boaters and swimmers and non-boaters and swimmers. Hawaii (8.2) received the highest rating among the U.S. destinations.

Fig. 5 Overall Appeal Ratings of Provinces, Territories and Selected U.S. States on a 10-Point Appeal Rating Scale (Higher Scores=More Appealing)



Other Outdoor Activities Pursued While on Trips

Boaters and swimmers are quite active in outdoor activities when they travel. The majority of boaters and swimmers participated in ocean activities (e.g., sunbathing, swimming in ocean), wildlife viewing, and hiking, climbing and paddling while on trips. Relative to the average Canadian Pleasure Traveller, boaters and swimmers were much more likely to pursue water-related outdoor activities such as fishing, sailing and surfing, and freshwater scuba diving and snorkeling. They were also more likely to participate in family-oriented outdoor activities (e.g., sports & games, cycling, skating, snowmobiling & ATVing, horseback riding) as well as more physically strenuous activities (e.g., exercising & jogging, downhill skiing & snowboarding, cross-country skiing & snowshoeing) while on trips.

Fig. 6 Other Outdoor Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Outdoor Activity)

	Swimmers & Boaters	Non-Swimmers & Boaters	Pleasure Travellers	Index
Size of Market	7,579,543	10,859,966	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	72.6%	31.7%	48.5%	150
Wildlife Viewing	56.6%	30.5%	41.2%	137
Hiking, Climbing & Paddling	52.7%	21.1%	34.1%	155
Fishing	38.4%	13.3%	23.6%	163
Sports & Games (e.g., tennis, board games)	36.1%	13.4%	22.7%	159
Golfing	24.5%	14.0%	18.3%	134
Exercising & Jogging	23.9%	10.3%	15.9%	150
Downhill Skiing & Snowboarding	23.8%	8.3%	14.6%	162
Cycling	22.6%	7.2%	13.5%	167
Skating (e.g., ice skating, rollerblading)	21.7%	5.2%	12.0%	181
Snowmobiling & ATVing	17.9%	6.8%	11.3%	158
Team Sports (e.g., hockey, baseball)	16.8%	7.6%	11.4%	148
Cross-country Skiing & Snowshoeing	15.7%	4.9%	9.3%	168
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	10.7%	3.2%	6.3%	170
Horseback Riding	7.8%	2.9%	4.9%	159
Hunting	6.7%	3.3%	4.7%	142
Freshwater Scuba & Snorkeling	6.2%	0.8%	3.0%	206
Motorcycling	4.3%	2.1%	3.0%	143
Wilderness Activities (e.g., wilderness skills course)	3.8%	1.3%	2.4%	162
Extreme Air Sports (e.g., parachuting)	1.7%	0.7%	1.1%	150

Outdoor Activities Pursued in a Typical Year

The high level of activity exhibited by boaters and swimmers while on trips is also apparent when not traveling. In addition to swimming, boaters and swimmers frequently go on day outings to parks and picnicking, exercise at home or at a fitness club, garden at home and go hiking, cycling and camping. Relative to the average Canadian Pleasure Traveller, boaters and swimmers are especially likely to go sailing or boating, canoeing or kayaking, downhill skiing, snowboarding and skateboarding.

Fig. 7 Outdoor Activities Pursued in a Typical Year

	Swimmers & Boaters	Non-Swimmers & Boaters	Pleasure Travellers	Index
Size of Market	7,579,543	10,859,966	18,439,508	100
Swimming	74.5%	50.4%	60.3%	124
Day outing to a park	72.9%	62.6%	66.9%	109
Exercising at home or at a fitness club	64.2%	58.8%	61.0%	105
Gardening	61.6%	58.5%	59.8%	103
Picnicking	57.7%	49.8%	53.1%	109
Hiking	56.6%	43.3%	48.8%	116
Cycling	53.1%	38.2%	44.3%	120
Camping	51.1%	29.9%	38.6%	132
Ice-skating	36.6%	22.8%	28.5%	129
Fishing	36.0%	24.6%	29.3%	123
Sailing or other boating	33.3%	16.5%	23.4%	142
Golfing	33.0%	26.8%	29.4%	113
Jogging	29.2%	20.5%	24.1%	121
Playing team sports	29.1%	18.7%	22.9%	127
Canoeing or kayaking	25.2%	11.1%	16.9%	149
Playing racquet sports (e.g., tennis or badminton)	23.3%	16.2%	19.1%	122
Downhill skiing	23.0%	11.4%	16.2%	142
Rollerblading	18.8%	11.3%	14.4%	131
Riding an all-terrain vehicle (ATV)	17.3%	12.2%	14.3%	121
Cross-country skiing	15.7%	10.2%	12.5%	126
Snowmobiling	12.4%	8.0%	9.8%	126
Horseback riding	8.7%	5.5%	6.8%	128
Hunting	8.3%	7.3%	7.7%	108
Snowboarding	7.5%	3.3%	5.0%	148
Skateboarding	2.2%	1.2%	1.6%	136

Culture and Entertainment Activities Pursued While on Trips

Boaters and swimmers were generally more active than the average Canadian Pleasure Traveller in culture and entertainment activities while on trips. They frequently went shopping and dining, visited historical sites, museums and art galleries and visited theme parks & exhibits when on trips. Relative to the typical Canadian Pleasure Traveller, they were especially likely to attend sporting events (e.g., amateur tournaments, professional sporting events), musical concerts, festivals and attractions, theme parks and exhibits and educational cultural attractions (e.g., aboriginal cultural experiences) while on trips. Many of these activities are more likely to appeal to families.

Fig. 8 Culture and Entertainment Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Culture & Entertainment Activity)

	Swimmers & Boaters	Non-Swimmers & Boaters	Pleasure Travellers	Index
Size of Market	7,579,543	10,859,966	18,439,508	100
Shopping & Dining	89.1%	78.6%	82.9%	107
Historical Sites, Museums & Art Galleries	66.9%	52.3%	58.3%	115
Theme Parks & Exhibits	50.6%	31.2%	39.2%	129
Fairs & Festivals	49.5%	29.5%	37.7%	131
Musical Concerts, Festivals & Attractions	44.1%	24.8%	32.7%	135
Science & Technology Exhibits	29.4%	18.8%	23.1%	127
Wine, Beer & Food Tastings	29.2%	20.0%	23.8%	123
Casinos	28.9%	23.8%	25.9%	112
Live Theatre	26.0%	17.7%	21.1%	123
Professional Sporting Events	21.8%	11.4%	15.7%	139
Garden Theme Attractions	20.6%	15.5%	17.6%	117
Agro-Tourism	20.6%	12.3%	15.7%	131
Amateur Tournaments	17.2%	8.0%	11.8%	146
Aboriginal Cultural Experiences	16.9%	7.9%	11.6%	145
High Art Performances	14.6%	8.5%	11.0%	133
Spas	13.9%	7.4%	10.0%	138
Comedy Festivals & Clubs	13.3%	7.9%	10.1%	131
Participatory Historical Activities	9.0%	5.1%	6.7%	134
Equestrian & Western Events	8.3%	5.5%	6.7%	125
National & International Sporting Events	4.6%	2.3%	3.2%	143
Literary & Film Festivals	3.7%	1.8%	2.6%	145

Culture and Entertainment Activities Pursued in a Typical Year

While not traveling, boaters and swimmers are moderately active in culture and entertainment pursuits. The majority of boaters and swimmers dine in local restaurants and visit local festivals and fairs. Relative to the average Canadian Pleasure Traveller, boaters and swimmers were slightly more likely to attend professional sporting events, and live rock music or jazz performances. They were slightly less likely than average to visit botanical gardens, attend classical music or opera performances or to gamble in a casino.

Fig. 9 Culture and Entertainment Activities Pursued in a Typical Year

	Swimmers & Boaters	Non-Swimmers & Boaters	Pleasure Travellers	Index
Size of Market	7,579,543	10,859,966	18,439,508	100
Going out to eat in restaurants	93.1%	90.4%	91.5%	102
Going to festivals or fairs	66.0%	58.3%	61.4%	107
Going to amateur sporting events	48.9%	37.2%	42.0%	116
Going to pick-your-own farms or farmers' market	42.6%	39.8%	41.0%	104
Going to historic sites or heritage buildings	40.0%	38.8%	39.3%	102
Going to professional sporting events	36.6%	28.9%	32.1%	114
Going to live theatre	36.5%	33.6%	34.8%	105
Going to bars with live pop or rock bands	35.9%	22.0%	27.7%	130
Going to museums	34.5%	31.5%	32.7%	105
Going dancing	33.6%	27.2%	29.9%	113
Going to zoos or aquariums	33.5%	28.3%	30.4%	110
Going to art galleries or art shows	33.4%	30.7%	31.8%	105
Going to amusement or theme parks	32.7%	26.2%	28.9%	113
Going to rock music concerts	29.4%	17.6%	22.4%	131
Going to botanical gardens	24.3%	26.1%	25.4%	96
Going to gamble in casinos	17.6%	18.5%	18.1%	97
Going to classical music concerts	16.3%	16.7%	16.5%	99
Going to day spas	15.3%	12.7%	13.8%	111
Staying overnight in a hotel or B&B in own city	10.7%	9.3%	9.9%	109
Going to jazz clubs	10.0%	5.8%	7.5%	133
Going to rodeos	8.1%	6.8%	7.3%	111
Going to the ballet	7.7%	7.0%	7.3%	105
Going to the opera	6.3%	6.8%	6.6%	95

Accommodation Stayed In While on a Trip

Public campgrounds and lakeside or riverside resorts were the most commonly used accommodation by boaters and swimmers while on trips in the past two years. Relative to the average Canadian Pleasure Traveller, this activity segment was especially likely to stay at accommodation in wilderness settings (including a wilderness campsite, a wilderness lodge accessible by car, a remote or fly-in wilderness lodge or outpost) and on a houseboat.

Fig. 10 Accommodation Stayed in While on Trips

	Swimmers & Boaters	Non-Swimmers & Boaters	Pleasure Travellers	Index
Size of Market	7,579,543	10,859,966	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	40.3%	16.6%	26.4%	153
Lakeside / Riverside Resort	31.1%	16.2%	22.3%	140
A Private Campground	28.1%	12.3%	18.8%	150
Seaside Resort	24.9%	17.8%	20.7%	120
Ski Resort or Mountain Resort	19.8%	9.9%	13.9%	142
A Camp Site in a Wilderness Setting (Not a Campground)	13.8%	5.0%	8.6%	160
Wilderness Lodge You Can Drive to by Car	8.5%	3.6%	5.6%	151
Health Spa	7.7%	4.7%	5.9%	131
Country Inn or Resort with Gourmet Restaurant	5.8%	4.6%	5.1%	114
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	5.5%	3.8%	4.5%	123
Farm or Guest Ranch	3.8%	2.5%	3.0%	124
Remote or Fly-In Wilderness Lodge	2.5%	1.0%	1.6%	158
On a Houseboat	2.2%	0.8%	1.4%	162
Remote or Fly-In Wilderness Outpost	1.0%	0.3%	0.6%	177
Cooking School	0.4%	0.3%	0.4%	124
Wine Tasting School	0.3%	0.2%	0.3%	105

Tours and Cruises Taken During Past Two Years

Boaters and swimmers were more likely than the average Canadian Pleasure Traveller to have taken tours in the past two years. The types of tours taken most often by boaters and swimmers were sameday tours (both guided and non-guided), scenic countryside drives and city tours. Relative to the average Canadian Pleasure Traveller, this segment was particularly likely to have taken wilderness tours while on a trip. Boaters and swimmers were also more likely than average to take sightseeing cruises, and cruises on lakes and rivers (e.g., St. Lawrence River, Great Lakes). However, boaters and swimmers were less likely than average to take an ocean cruise (e.g., Caribbean cruise, Alaskan cruise).

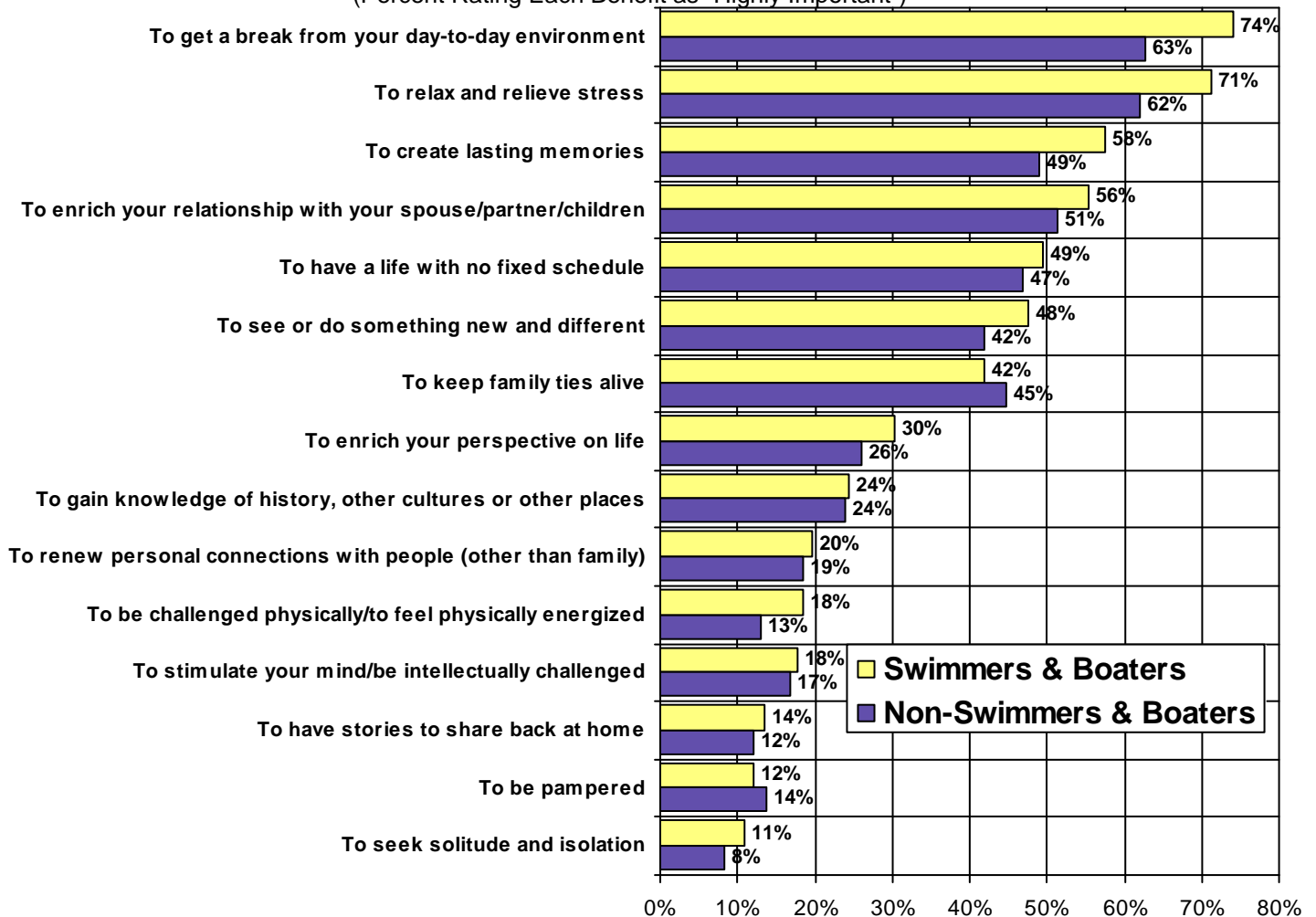
Fig. 11 Tours and Cruises Taken During Past Two Years

	Swimmers & Boaters	Non-Swimmers & Boaters	Pleasure Travellers	Index
Size of Market	7,579,543	10,859,966	18,439,508	100
A self-guided, sameday tour while on an overnight trip	36.8%	24.0%	29.3%	126
Around the countryside - scenic drives	28.0%	18.6%	22.4%	125
Around the city	27.7%	20.4%	23.4%	118
An organized, sameday, guided tour while on an overnight trip	27.5%	18.5%	22.2%	124
A self-guided, overnight, tour where you stayed in different locations	21.5%	15.8%	18.1%	119
Wilderness tour	18.6%	9.1%	13.0%	143
On the water (sightseeing cruise)	18.2%	9.5%	13.1%	139
Some other type of tour	12.1%	8.3%	9.8%	123
An organized, overnight, guided tour where you stayed in different locations	10.1%	10.0%	10.1%	101
An organized, overnight, guided tour where you stayed in a single location	8.7%	7.3%	7.8%	111
To a casino	7.7%	5.7%	6.5%	118
To a winery	7.2%	4.6%	5.6%	127
Caribbean ocean cruise	5.3%	5.5%	5.4%	98
To a factory	3.4%	2.1%	2.6%	129
Cruise on another lake or river	3.3%	1.8%	2.4%	137
Ocean cruise – Other	3.1%	3.4%	3.3%	95
In the air as a pilot or passenger of an airplane or helicopter	2.4%	1.6%	1.9%	125
Cruise on the St. Lawrence River	2.1%	1.8%	1.9%	110
Some other type of cruise	2.0%	1.3%	1.6%	123
Alaskan ocean cruise	1.3%	1.8%	1.6%	82
Great Lakes cruise	1.3%	0.5%	0.8%	158
Submarine cruise	0.1%	0.1%	0.1%	103

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travellers, the majority of boaters and swimmers take vacations to get a break from their day-to-day environment, to relax and relieve stress, to create lasting memories and to enrich family relationships. Relative to other Canadian Pleasure Travellers, boaters and swimmers are especially likely to seek vacations that are relaxing and provide an escape from their daily environment. They also consider it important that a vacation destination offers something new and different, enriches their perspective on life and allows them to be physically challenged and energized.

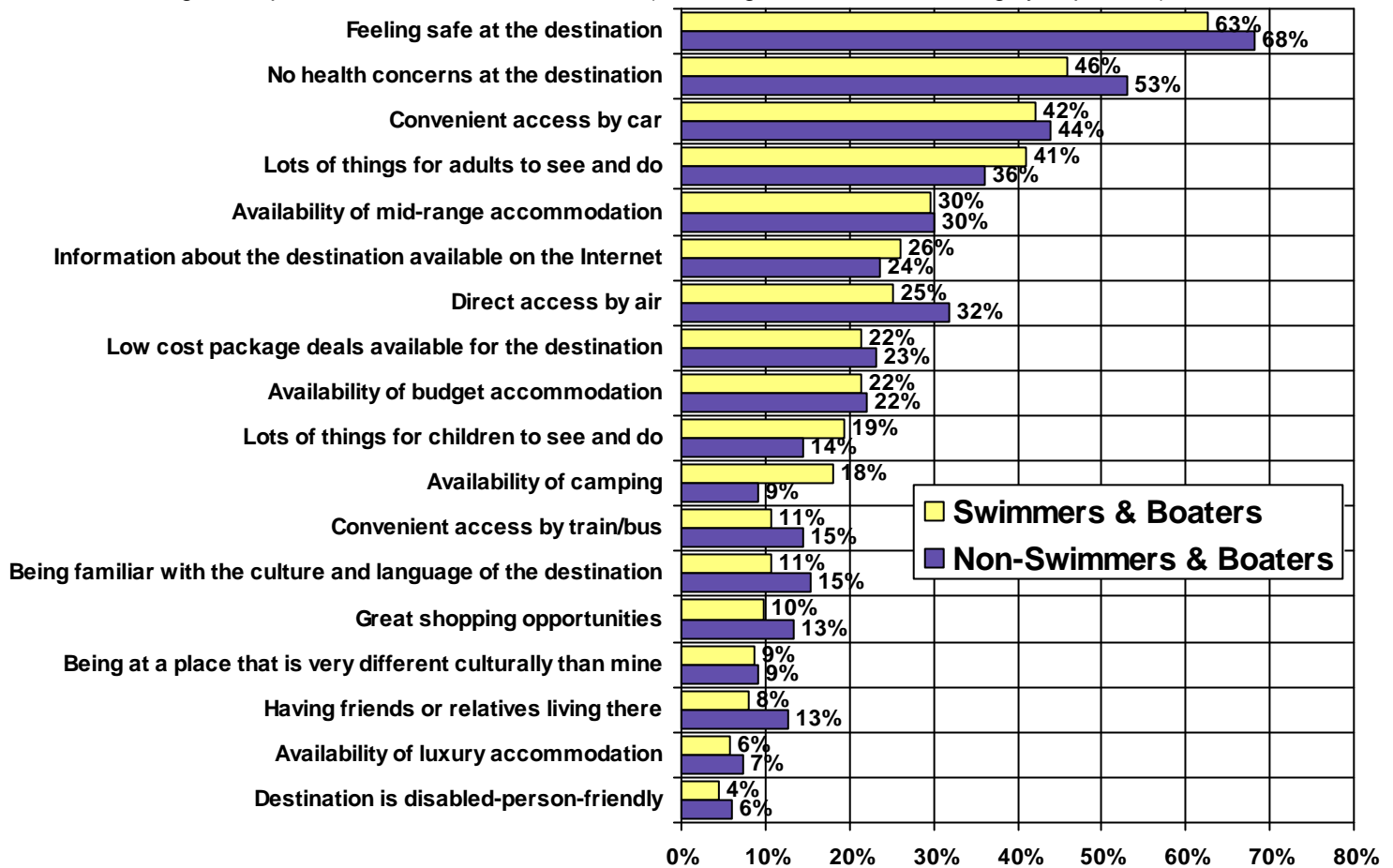
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travellers, boaters and swimmers consider it important that they feel safe at a destination. However, boaters and swimmers were more likely than others to consider it important that a destination has camping available and lots of things to do for both adults and children. They consider it less important that the destination has no health concerns, is directly accessible by air and has family and friends living near-by.

Fig. 13 Importance of Destination Attributes (% Rating Each Attribute as “Highly Important”)



How Destinations are Selected

Similar to the average Canadian Pleasure Traveller, boaters and swimmers tend to start planning vacations with a particular destination in mind. For summer trips, boaters and swimmers are slightly more likely than the average Canadian Pleasure Traveller to select a destination based on the type of vacation experience they desire. For winter trips, they are more likely to begin their vacation planning by considering what type of activities they want to do.

Fig. 14 How Destinations Are Selected (Summer and Winter Vacations)

	Swimmers & Boaters	Non-Swimmers & Boaters	Pleasure Travellers	Index
Size of Market	7,579,543	10,859,966	18,439,508	100
Summer				
Started with a desired destination in mind	48.2%	48.7%	48.5%	99
Started by considering specific activities wanted to do	14.0%	13.6%	13.8%	102
Started with a certain type of vacation experience in mind	26.1%	21.8%	23.7%	110
Looked for packaged deals - no destination in mind	1.2%	1.4%	1.3%	94
Considered something else first	4.4%	4.2%	4.3%	102
Don't know / Other	6.1%	10.2%	8.4%	73
Winter				
Started with a desired destination in mind	47.2%	49.8%	48.6%	97
Started by considering specific activities wanted to do	19.4%	12.3%	15.6%	124
Started with a certain type of vacation experience in mind	19.4%	19.2%	19.3%	101
Looked for packaged deals - no destination in mind	2.9%	3.5%	3.2%	89
Considered something else first	3.8%	5.4%	4.7%	81
Don't know / Other	7.4%	9.7%	8.6%	86

Trip Planning and Information Sources Consulted

The majority of boaters and swimmers were responsible for planning their trips either on their own (41.1%) or with someone else (15.6%).

Boaters and swimmers most often use the Internet, word-of-mouth and past experiences to help plan travel. Relative to the average Canadian Traveller, boaters and swimmers are more likely than average to obtain travel planning information from the official travel guides issued by states or provinces, from visitor information centres and from trade, travel and sports shows.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Swimmers & Boaters	Non-Swimmers & Boaters	Pleasure Travellers	Index
Size of Market		7,579,543	10,859,966	18,439,508	100
Who Plans Trips?	Respondent plans trips	41.1%	42.8%	42.0%	98
	Trip planning a shared responsibility	15.6%	17.0%	16.4%	95
	Someone else plans trips	43.3%	40.2%	41.5%	104
Information Sources Consulted	An Internet website	73.2%	59.2%	65.2%	112
	Advice of others / Word-of-mouth	61.2%	43.5%	51.1%	120
	Past experience / Been there before	58.3%	44.4%	50.4%	116
	Maps	38.0%	28.5%	32.6%	117
	A travel agent	35.7%	32.9%	34.1%	105
	Official travel guides or brochures from state / province	31.1%	22.1%	26.0%	120
	Visitor information centres	28.3%	19.7%	23.4%	121
	Articles in newspapers / magazines	24.5%	18.2%	20.9%	117
	An auto club such as CAA	18.9%	16.7%	17.7%	107
	Advertisements in newspapers / magazines	16.5%	12.6%	14.3%	116
	Travel guide books such as Fodor's	15.6%	12.2%	13.6%	114
	Programs on television	9.2%	6.3%	7.5%	122
	Travel information received in the mail	9.1%	8.7%	8.8%	103
	An electronic newsletter or magazine received by e-mail	5.0%	3.6%	4.2%	119
Advertisements on television	4.9%	5.1%	5.0%	98	
Visits to trade, travel or sports shows	4.3%	2.2%	3.1%	139	

Use of the Internet to Plan and Arrange Trips

Boaters and swimmers are more likely than the average Canadian Pleasure Traveller to use the Internet to plan (68.8%) and book travel (43.2%). However, their use of the Internet is somewhat less than other outdoor activity types as they were the 15th most likely of the 21 outdoor activity types to use the Internet to plan and purchase travel.

The majority of boaters and swimmers use hotel or resort websites and the tourism websites of specific countries, regions or cities. Most of those who did book trip components over the Internet arranged accommodation or purchased airline tickets.

Fig. 16 Use of the Internet to Plan and Book Travel

		Swimmers & Boaters	Non-Swimmers & Boaters	Pleasure Travellers	Index
Size of Market		7,579,543	10,859,966	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	31.2%	47.5%	40.8%	76
	Uses Internet to plan trips only	25.6%	19.7%	22.1%	116
	Uses Internet to book part of trip	43.2%	32.7%	37.0%	117
Types of Websites Consulted	A website of a hotel or resort	59.6%	54.6%	57.0%	105
	A tourism website of a country / region / city	53.0%	46.9%	49.8%	106
	A travel planning / booking website	46.8%	44.6%	45.7%	102
	An airline website	46.6%	46.2%	46.3%	100
	A website of an attraction	38.9%	30.3%	34.5%	113
	Some other website	30.4%	25.0%	27.6%	110
	A cruise line website	7.9%	8.2%	8.1%	98
A motorcoach website	2.6%	2.3%	2.5%	105	
Parts of Trips Booked Over The Internet	Accommodation	72.1%	66.5%	69.2%	104
	Air tickets	68.0%	70.8%	69.5%	98
	Car rental	26.8%	27.4%	27.1%	99
	Tickets or fees for specific activities or attractions	25.8%	21.6%	23.6%	109
	A package containing two or more items	17.0%	14.0%	15.4%	110
	Tickets for rail, bus or boat / ship fares	16.4%	14.3%	15.3%	107
	Other	4.6%	3.3%	3.9%	117

Media Consumption Habits

Boaters and swimmers are average users of travel media. They may be most effectively targeted through sports-related programming (e.g., outdoor activities & sports magazines, professional sports magazines, all-sports radio, sports websites) and family-related media (e.g., family & parenting magazines).

Fig. 17 Media Consumption Habits

		Swimmers & Boaters	Non- Swimmers & Boaters	Pleasure Travellers	Index
Size of Market		7,579,543	10,859,966	18,439,508	100
Newspaper Readership	Reads daily newspaper	87.3%	87.2%	87.3%	100
	Reads weekend edition of newspaper	87.3%	87.3%	87.3%	100
	Reads local neighbourhood or community newspapers	63.2%	60.4%	61.5%	103
	Reads other types of newspapers	16.1%	17.9%	17.2%	94
	Frequently or occasionally reads travel section of daily newspaper	45.2%	46.1%	45.7%	99
	Frequently or occasionally reads travel section of weekend newspaper	47.9%	46.9%	47.3%	101
Types of Magazines Read (Top 5 Indexed)	Outdoor activities / sports	16.7%	10.1%	12.8%	130
	Photography and video	4.9%	3.5%	4.1%	121
	Science and geography	19.5%	14.5%	16.6%	118
	Family and parenting	10.3%	7.7%	8.8%	117
	Professional sports	9.9%	7.5%	8.5%	116
Type of Television Programs Watched (Top 5 Indexed)	Music/Music video shows/channels	27.9%	23.8%	25.5%	110
	Reality shows (e.g., Canadian Idol)	43.5%	37.2%	39.8%	109
	Science fiction / Fantasy shows	20.8%	18.1%	19.2%	109
	Late night talk shows	29.3%	26.3%	27.5%	106
	Dramas (e.g., Law & Order)	60.8%	54.8%	57.3%	106
Type of Radio Programs Listened To (Top 5 Indexed)	Modern rock / Alternative rock	46.4%	30.5%	37.1%	125
	Top 40 / Current hits	30.3%	21.6%	25.2%	120
	All sports	12.8%	9.8%	11.1%	116
	Jazz/ Big band	9.7%	8.1%	8.8%	110
	Some other radio program	16.1%	15.2%	15.6%	103
Types of Websites Visited (Top 5 Indexed)	Sites for specific activities or interests	40.9%	31.7%	35.9%	114
	Sports	29.3%	24.9%	26.9%	109
	Entertainment	55.6%	48.2%	51.5%	108
	Shopping (all types)	35.3%	32.0%	33.5%	105
	Travel	53.3%	48.3%	50.6%	105

Appendix Two Canadian TAMS 2006 Culture and Entertainment Segmentation		
Activity Segment	Activities in Segment	
Historical Sites, Museums & Art Galleries	Well-known Historic Sites or Buildings	Well-known Natural Wonders
	Other Historic Sites, Monuments and Buildings	Historical Replicas of Cities or Towns With Historic Re-Enactments
	Strolling Around a City to Observe Buildings and Architecture	Museum - Military /War Museums
	Museum - General History or Heritage Museums	Art Galleries Paleontological/Archaeological Sites
Shopping & Dining	Shop Or Browse - Bookstore or Music Store	Shop Or Browse – Antiques
	Shop Or Browse - Clothing, Shoes and Jewellery	Shop Or Browse - Gourmet Foods in Retail Stores
	Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	Shop Or Browse - Greenhouse or Garden Centre
	Dining - Restaurants Offering Local Ingredients and Recipes	High-End Restaurants with an International Reputation
	Went to Local Outdoor Cafes	Other High-End Restaurants
Aboriginal Cultural Experiences	Aboriginal Cuisine (Tasted or Sampled)	Aboriginal Arts and Crafts Shows
	Aboriginal Heritage Attractions (e.g., Museums, Interpretive Centres)	Aboriginal Cultural Experiences in a Remote or Rural Setting
	Aboriginal Festivals & Events (e.g., Powwows)	Aboriginal Outdoor Adventure and /or Sports
Fairs & Festivals	Farmers' Markets or Country Fairs	Firework Displays
	Carnivals	Ethnic Festivals
	Exhibition or Fairs	Food /Drink Festivals
Science & Technology Exhibits	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
Theme Parks & Exhibits	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Entertainment Farms (e.g., Corn Maze, Petting Zoo)
	Wax Museums	
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	Professional Soccer Games
Live Theatre	Live Theatre	Live Theatre with Dinner
	Theatre Festivals	
Literary & Film Festivals	Literary Festivals or Events	International Film Festivals
Tastings	Went to Wineries for Day Visits and Tasting	Cooking /Wine Tasting Courses
	Went to Breweries for Day Visits and Tasting	Visited Food Processing Plants (e.g., Cheese Factory)
Casinos	Went to a Casino	
Spas	Day Visit to a Health & Wellness Spas while on an Overnight Trip	
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National /Provincial Park
	Curatorial Tours	Archaeological Digs
Equestrian & Western Events	Equine (Horse) Competitions	Western Theme Events (e.g., Rodeos)
	Horse Races	

Appendix Two		
Canadian TAMS 2006 Culture and Entertainment Segmentation		
Agro-Tourism	Dining At A Farm	Harvesting and /or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	
National & International Sporting Events	Curling Bonspiel	National /International Sporting Events such as the Olympic Games
	Professional Figure Skating	
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related
Musical Concerts, Festivals & Attractions	Music Festivals	Musical Attractions
	Jazz Concert	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Rock & Roll/Popular Music Concert	Country & Western Music Concert
Comedy Festivals & Clubs	Comedy Festivals	Stand-up Comedy Clubs & Other Variety Shows