

CANADIAN TRAVEL MARKET

Downhill Skiing & Snowboarding While on Trips Of One or More Nights

A Profile Report

October 26, 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



Downhill Skiing & Snowboarding While on Trips

Executive Summary

Over the last two years, 10.9% (2,698,842) of adult Canadians went downhill skiing or snowboarding while on an out-of-town, overnight trip of one or more nights. Downhill skiing and snowboarding was the 9th most common outdoor activity undertaken by Canadian Pleasure Travellers while traveling in the past two years. Downhill skiing (9.2%) was almost three times more popular than snowboarding (3.2%). Over two-thirds of those who went skiing or snowboarding (68.2%, or 1,840,712 adult Canadians) reported that this activity was the main reason for taking at least one trip, a rate that is the highest of the 21 outdoor activity types.

Skiers and Snowboarders are somewhat more likely to be male (55.2%) and the youngest of the 21 outdoor activity types with an average age of 36.6 years. They are significantly over-represented among Young Singles, Young Couples and Mature Families (with teenaged children). Skiers and Snowboarders are arguably the most affluent of the 21 outdoor activity types. They are the second most likely to have a university education (44.1%) and have the highest average household income (\$87,018) of any outdoor activity type. They are over-represented in Alberta and British Columbia.

Skiers and Snowboarders travelled extensively over the past two years. They were the most likely of the 21 outdoor activity types to have travelled to an adjacent province or region (64.6%), the 6th most likely to have taken a trip within their own province or region (93.9%) and the 7th most likely to have travelled to a non-adjacent province or region (39.6%) in the last two years. They were especially likely to have visited British Columbia, Alberta, Quebec, the Yukon, and the Northwest Territories. In terms of out-of-country travel, Skiers and Snowboarders were the 3rd most likely of the 21 outdoor activity types to have visited the United States (65.4%) and the 6th most likely to have visited Mexico (19.1%), the 8th most likely to have travelled to the Caribbean (21.9%).

Skiers and Snowboarders were very active in outdoor activities and culture and entertainment pursuits while they travelled. They were especially active in physically challenging and energetic outdoor pursuits (e.g., hiking, climbing & paddling; sailing & surfing, cross-country skiing and snowshoeing, cycling) and frequently attended sporting events, educational exhibits (e.g., science & technology exhibits) and live art performances (e.g., musical concerts, comedy festivals, high art performances). They prefer vacations that offer novelty, physical challenges and lots to see and do.

Skiers and Snowboarders are the heaviest users of the Internet to plan (79.0%) and book travel (54.6%). They can be most effectively targeted through travel-related media, sports-related media and popular-music radio stations and television programs.

Downhill Skiing & Snowboarding While on Trips

Market Incidence

Over the last two years, 10.9% (2,698,842) of adult Canadians went downhill skiing or snowboarding while on an out-of-town, overnight trip of one or more nights. Downhill skiing and snowboarding was the 9th most common outdoor activity undertaken by Canadian Pleasure Travellers while traveling in the past two years. Almost three times as many adult Canadians went downhill skiing (9.2%) than went snowboarding (3.2%). 1.5% (363,813 adult Canadians) participated in both downhill skiing and snowboarding while on trips during the past two years. The majority of those who skied or snowboarded (68.2%, or 1,840,712) reported that this activity was the main reason for taking at least one trip in the past two years. Those in this activity segment were the most likely of the 21 outdoor activity types to state that the activity was the main reason for taking at least one trip in the past two years.

Fig. 1 Incidence of Downhill Skiing & Snowboarding While on Trips¹

	Number of Skiers/Snowboarders ²	Percent Main Reason for Trip ³	Percent of Pleasure Travellers ⁴	Percent of Total Canadian Population ⁵
Size of Market	2,698,842	1,840,712	18,439,508	24,776,103
Downhill Skiing & Snowboarding (All Activities)	2,698,842	68.2%	14.6%	10.9%
Downhill skiing	2,272,265	69.4%	12.3%	9.2%
Snowboarding	790,390	60.6%	4.3%	3.2%
Participated in both activities	363,813	58.8%	2.0%	1.5%

- 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 - "Skiers and Snowboarders" are defined as individuals who went downhill skiing or snowboarding while on an out-of-town 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

Skiers and Snowboarders are more likely to live in Alberta and British Columbia. They are least likely to reside in Manitoba and the Atlantic Provinces.

Fig. 2 Geographic Distribution of Those Who Went Downhill Skiing & Snowboarding While on Trips

	Total Population	Estimated Number Who Skied/ Snowboarded on a Trip	Percent of Pleasure Travellers in Region Who Skied/ Snowboarded on a Trip	Percent of Total Regional Population Who Skied/ Snowboarded on a Trip
Canada	24,776,103	2,698,842	14.6%	10.9%
Atlantic Provinces	1,822,494	117,793	9.3%	6.5%
Quebec	5,940,869	587,952	14.0%	9.9%
Ontario	9,671,592	1,036,577	14.5%	10.7%
Manitoba	843,107	42,856	7.2%	5.1%
Saskatchewan	706,325	68,910	12.7%	9.8%
Alberta	2,465,540	401,856	20.0%	16.3%
British Columbia	3,326,176	442,900	16.6%	13.3%

Demographic Profile

Skiers and Snowboarders are somewhat more likely to be male (55.2%) and the youngest (36.6 years old) of the 21 outdoor activity types. They are significantly over-represented among Young Singles, Young Couples and Mature Families (with teenaged children). Skiers and Snowboarders are arguably the most affluent of the 21 outdoor activity types. They are the second most likely to have a university education (44.1%) and have the highest average household income (\$87,018) of any segment.

Fig. 3 Demographic Profile of Skiers and Snowboarders
Relative to All Canadian Pleasure Travellers

Attribute	Size of Market	Skiers/ Snowboarders	Non-Skiers/ Snowboarders ¹	Pleasure Travellers	Index ²
		2,698,842	15,740,667	18,439,508	100
Gender	Male	55.2%	47.7%	48.8%	113
	Female	44.8%	52.3%	51.2%	87
Age of Respondent	18 to 24	23.6%	11.0%	12.8%	184
	25 to 34	24.8%	18.3%	19.3%	128
	35 to 44	25.0%	19.8%	20.5%	122
	45 to 54	17.8%	20.8%	20.3%	87
	55 to 64	6.7%	15.4%	14.1%	48
	65 Plus	2.2%	14.7%	12.9%	17
Average Age		36.6	45.9	44.5	N/A
Marital Status	Not married	37.9%	31.2%	32.2%	118
	Married	62.1%	68.8%	67.8%	92
Parental Status	No children under 18	65.9%	72.0%	71.1%	93
	Children under 18	34.1%	28.0%	28.9%	118
Education	High school or less	21.2%	38.8%	36.2%	59
	Some post-secondary	14.1%	10.7%	11.2%	126
	Post-secondary diploma/certificate	20.5%	22.1%	21.9%	94
	University degree	44.1%	28.4%	30.7%	144
Household Income	Under \$20,000	4.5%	5.9%	5.7%	78
	\$20,000 to \$39,999	7.9%	15.6%	14.5%	55
	\$40,000 to \$59,999	9.8%	17.7%	16.5%	60
	\$60,000 to \$79,999	15.6%	15.2%	15.2%	103
	\$80,000 to \$99,999	13.3%	12.0%	12.2%	109
	\$100,000 or more	36.6%	20.5%	22.8%	160
	Not stated	12.2%	13.1%	13.0%	94
Average Household Income		\$87,018	\$70,371	\$72,829	N/A

- 1 - "Non-Skiers and Snowboarders" 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 downhill skiing or snowboarding on any trip. The numbers of Skiers and Snowboarders and Non-Skiers and Snowboarders equal the number of Pleasure Travellers.
- 2 - The "Index" is calculated by dividing the percent for Skiers and Snowboarders in each group by the percent of Pleasure Travellers in each group. The Index indicates the extent to which Skiers and Snowboarders 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)

Skiers and Snowboarders travelled extensively over the past two years. They were most likely of the 21 outdoor activity types to have travelled to an adjacent province or region (64.6%), the 6th most likely to have taken a trip within their own province or region (93.9%) and the 7th most likely to have travelled to a non-adjacent province or region (39.6%) in the last two years. Ontario (60.0%), Quebec (51.2%), British Columbia (44.9%) and Alberta (36.8%) were the most common destinations. However, in relative terms, they were especially likely to have visited British Columbia, Alberta, Quebec, the Yukon, and the Northwest Territories.

In terms of out-of-country travel, Skiers and Snowboarders were the 3rd most likely of the 21 outdoor activity types to have visited the United States (65.4%), the 6th most likely to have visited Mexico (19.1%), the 8th most likely to have travelled to the Caribbean (21.9%) and the 4th most likely to have taken an overseas trip (47.5%).

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

	Skiers/ Snowboarders	Non-Skiers/ Snowboarders	Pleasure Travellers	Index
Size of Market	2,698,842	15,740,667	18,439,508	100
Canada	98.6%	94.1%	94.8%	104
Took a trip within own province / region	93.9%	84.5%	85.9%	109
Took a trip to an adjacent province / region	64.6%	45.8%	48.6%	133
Took a trip to non-adjacent province / region	39.6%	30.0%	31.4%	126
Newfoundland and Labrador	4.0%	4.4%	4.3%	94
Prince Edward Island	8.4%	7.0%	7.2%	118
New Brunswick	12.9%	11.6%	11.8%	109
Nova Scotia	13.2%	12.6%	12.7%	104
Quebec	51.2%	36.8%	38.9%	131
Ontario	60.0%	52.4%	53.5%	112
Manitoba	9.8%	9.0%	9.2%	108
Saskatchewan	12.4%	11.2%	11.4%	108
Alberta	36.8%	24.0%	25.8%	142
British Columbia	44.9%	28.2%	30.6%	147
Yukon	1.3%	0.9%	1.0%	134
Northwest Territories	0.9%	0.6%	0.7%	141
Nunavut	0.3%	0.3%	0.3%	96
United States	65.4%	48.1%	50.7%	129
Mexico	19.1%	11.2%	12.4%	154
Caribbean	21.9%	14.5%	15.6%	141
All other destinations	34.6%	21.8%	23.6%	146

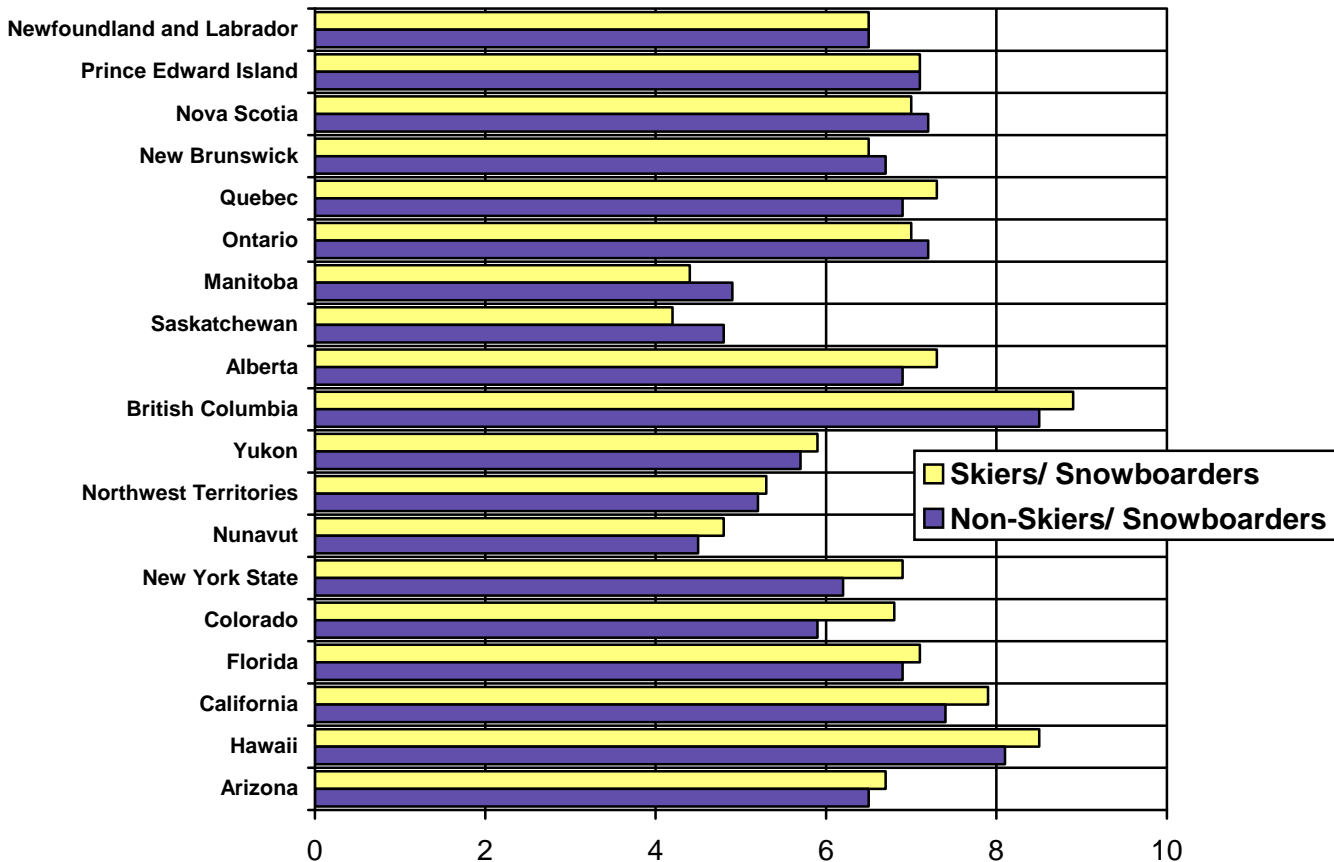
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Skiers and Snowboarders have a more positive impression of British Columbia (8.9), Alberta (7.3), Quebec (7.3) and the northern territories than Non-Skiers and Snowboarders, in part reflecting the fact these areas offer exceptional skiing venues. On the other hand they have less positive impressions of Manitoba and Saskatchewan.

The well-travelled Skiers and Snowboarders were also more positive towards the U.S. reference states than Non-Skiers and Snowboarders and especially Colorado. British Columbia, Hawaii (8.5) and California (7.9) were perceived as the most appealing destinations overall.

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

Skiers and Snowboarders were very active in outdoor activities while they travel. They frequently participated in ocean activities (e.g., sunbathing, swimming in ocean), boating and swimming (e.g., motorboating, swimming in lake) and hiking, climbing and paddling while on trips. Relative to the average Canadian Pleasure Traveller, Skiers and Snowboarders were two to three times more likely to participate in a wide range of physically challenging outdoor activities, including skating, cycling, exercising and jogging, team sports, cross-country skiing and snowshoeing, sailing and surfing, freshwater scuba diving and snorkeling, wilderness activities and extreme air sports. This high level of strenuous outdoor activity reflects the fact that this segment is predominantly young, male and affluent. These attributes tend to be associated with higher levels of physically strenuous, outdoor activity.

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

	Skiers/ Snowboarders	Non-Skiers/ Snowboarders	Pleasure Travellers	Index
Size of Market	2,698,842	15,740,667	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	69.2%	45.0%	48.5%	143
Boating & Swimming (e.g., motorboating, swimming in lakes)	66.7%	36.7%	41.1%	162
Hiking, Climbing & Paddling	60.0%	29.6%	34.1%	176
Wildlife Viewing	51.1%	39.6%	41.2%	124
Sports & Games (e.g., tennis, board games)	39.5%	19.8%	22.7%	174
Fishing	33.0%	22.0%	23.6%	140
Golfing	32.9%	15.8%	18.3%	180
Skating (e.g., ice skating, rollerblading)	31.7%	8.6%	12.0%	265
Cycling	31.1%	10.5%	13.5%	230
Exercising & Jogging	30.9%	13.3%	15.9%	195
Cross-country Skiing & Snowshoeing	23.4%	6.9%	9.3%	251
Team Sports (e.g., hockey, baseball)	22.3%	9.5%	11.4%	196
Snowmobiling & ATVing	17.5%	10.3%	11.3%	154
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	16.1%	4.6%	6.3%	256
Horseback Riding	10.5%	3.9%	4.9%	215
Freshwater Scuba & Snorkeling	8.3%	2.1%	3.0%	276
Wilderness Activities (e.g., wilderness skills course)	6.1%	1.7%	2.4%	259
Motorcycling	5.2%	2.6%	3.0%	173
Hunting	4.2%	4.8%	4.7%	89
Extreme Air Sports (e.g., parachuting)	3.0%	0.8%	1.1%	263

Outdoor Activities Pursued in a Typical Year

Skiers and Snowboarders are also very active in outdoor activities when they are not traveling. In addition to going downhill skiing, they frequently go on day outings to parks, swim, exercise, cycle and go hiking. Relative to other Canadian Pleasure Travellers, Skiers and Snowboarders are much more likely to go downhill skiing, snowboarding, cross-country skiing and ice-skating while not traveling. They are also much more likely than others to go canoeing and kayaking, jogging, cycling and sailing or other boating and to play team sports, racquet sports and golf while not on trips.

Fig. 7 Outdoor Activities Pursued in a Typical Year

	Skiers/ Snowboarders	Non-Skiers/ Snowboarders	Pleasure Travellers	Index
Size of Market	2,698,842	15,740,667	18,439,508	100
Day outing to a park	74.2%	65.6%	66.9%	111
Swimming	72.5%	58.2%	60.3%	120
Exercising at home or at a fitness club	69.8%	59.5%	61.0%	114
Cycling	65.6%	40.7%	44.3%	148
Downhill skiing	64.8%	7.9%	16.2%	400
Hiking	63.9%	46.2%	48.8%	131
Gardening	54.4%	60.7%	59.8%	91
Picnicking	53.5%	53.0%	53.1%	101
Camping	50.7%	36.5%	38.6%	131
Ice-skating	45.1%	25.7%	28.5%	158
Jogging	40.9%	21.2%	24.1%	170
Golfing	40.7%	27.4%	29.4%	139
Playing team sports	39.6%	20.1%	22.9%	173
Playing racquet sports (e.g., tennis or badminton)	34.2%	16.6%	19.1%	178
Sailing or other boating	33.3%	21.8%	23.4%	142
Canoeing or kayaking	31.9%	14.3%	16.9%	189
Rollerblading	30.0%	11.7%	14.4%	208
Fishing	28.3%	29.4%	29.3%	97
Cross-country skiing	23.2%	10.6%	12.5%	187
Snowboarding	21.7%	2.2%	5.0%	430
Riding an all-terrain vehicle (ATV)	15.1%	14.1%	14.3%	105
Snowmobiling	11.1%	9.5%	9.8%	114
Horseback riding	10.3%	6.2%	6.8%	151
Hunting	6.0%	8.0%	7.7%	78
Skateboarding	4.7%	1.1%	1.6%	296

Culture and Entertainment Activities Pursued While on Trips

Skiers and Snowboarders were also highly active in culture and entertainment pursuits while on trips. The majority went shopping and dining, visited historical sites, museums and art galleries and visited theme parks and exhibits while on trips. Relative to the average Canadian Pleasure Traveller, Skiers and Snowboarders were especially likely to attend sporting events (e.g., professional sporting events, amateur tournaments, national & international sporting events), live art performances (e.g., musical concerts, festivals and attractions, comedy festivals and clubs, high art performances, live theatre) and literary and film festivals. They were also more likely to take part in participatory historical activities, visit science and technology exhibits and theme parks, participate in tastings and visit health spas while on trips.

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

	Skiers/ Snowboarders	Non-Skiers/ Snowboarders	Pleasure Travellers	Index
Size of Market	2,698,842	15,740,667	18,439,508	100
Shopping & Dining	89.4%	81.8%	82.9%	108
Historical Sites, Museums & Art Galleries	69.0%	56.5%	58.3%	118
Theme Parks & Exhibits	56.6%	36.2%	39.2%	145
Fairs & Festivals	49.2%	35.7%	37.7%	131
Musical Concerts, Festivals & Attractions	48.6%	30.0%	32.7%	148
Science & Technology Exhibits	35.3%	21.1%	23.1%	153
Wine, Beer & Food Tastings	35.2%	21.9%	23.8%	148
Casinos	30.1%	25.2%	25.9%	116
Professional Sporting Events	28.6%	13.4%	15.7%	183
Live Theatre	28.4%	19.8%	21.1%	135
Garden Theme Attractions	23.9%	16.5%	17.6%	136
Amateur Tournaments	21.6%	10.1%	11.8%	183
Agro-Tourism	21.5%	14.7%	15.7%	137
Spas	18.5%	8.6%	10.0%	184
Comedy Festivals & Clubs	17.5%	8.9%	10.1%	172
High Art Performances	16.0%	10.1%	11.0%	146
Aboriginal Cultural Experiences	15.2%	11.0%	11.6%	131
Participatory Historical Activities	10.9%	6.0%	6.7%	163
Equestrian & Western Events	9.6%	6.2%	6.7%	144
National & International Sporting Events	4.9%	2.9%	3.2%	152
Literary & Film Festivals	4.4%	2.3%	2.6%	171

Culture and Entertainment Activities Pursued in a Typical Year

Skiers and Snowboarders are also highly active in culture and entertainment pursuits while not traveling. Relative to the typical Canadian Pleasure Traveller, Skiers and Snowboarders were especially likely to attend local live music performances (e.g., local bars with live pop or rock bands, local rock music concerts, local classical music concerts, local jazz clubs), to go dancing and to attend sporting events (professional sporting events, amateur sporting events, rodeos). On the other hand, they are less likely to visit local historical sites, pick-your-own farms or farmers' markets or local botanical gardens or to gamble in a local casino.

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

	Skiers/ Snowboarders	Non-Skiers/ Snowboarders	Pleasure Travellers	Index
Size of Market	2,698,842	15,740,667	18,439,508	100
Going out to eat in restaurants	94.6%	91.0%	91.5%	103
Going to festivals or fairs	64.9%	60.8%	61.4%	106
Going to amateur sporting events	52.2%	40.2%	42.0%	124
Going to bars with live pop or rock bands	45.1%	24.7%	27.7%	163
Going to professional sporting events	43.8%	30.0%	32.1%	137
Going dancing	38.2%	28.4%	29.9%	128
Going to live theatre	37.8%	34.3%	34.8%	109
Going to pick-your-own farms or farmers' market	37.4%	41.6%	41.0%	91
Going to historic sites or heritage buildings	36.0%	39.9%	39.3%	92
Going to rock music concerts	35.9%	20.1%	22.4%	160
Going to art galleries or art shows	35.4%	31.2%	31.8%	111
Going to museums	34.9%	32.3%	32.7%	107
Going to amusement or theme parks	32.2%	28.3%	28.9%	112
Going to zoos or aquariums	31.4%	30.3%	30.4%	103
Going to botanical gardens	21.9%	26.0%	25.4%	86
Going to day spas	20.3%	12.6%	13.8%	147
Going to classical music concerts	17.3%	16.4%	16.5%	105
Going to gamble in casinos	16.4%	18.4%	18.1%	91
Going to jazz clubs	12.5%	6.7%	7.5%	166
Staying overnight in a hotel or B&B in own city	12.0%	9.5%	9.9%	121
Going to rodeos	9.9%	6.9%	7.3%	135
Going to the ballet	8.4%	7.1%	7.3%	116
Going to the opera	7.1%	6.5%	6.6%	108

Accommodation Stayed In While on a Trip

The majority of Skiers and Snowboarders (55.0%) stayed at a ski or mountain resort in the past two years; four times more likely than the average Canadian Pleasure Traveller. They were also more likely to have stayed at public or private campgrounds, at health spas, on a houseboat and in wilderness areas (e.g., campsites, car-accessible lodge, remote or fly-in lodge or outpost) in the last two years.

Fig. 10 Accommodation Stayed in While on Trips

	Skiers/ Snowboarders	Non-Skiers/ Snowboarders	Pleasure Travellers	Index
Size of Market	2,698,842	15,740,667	18,439,508	100
Ski Resort or Mountain Resort	55.0%	6.9%	13.9%	394
A Public Campground in a National, State, Provincial or Municipal Park	41.7%	23.7%	26.4%	158
Lakeside / Riverside Resort	32.5%	20.6%	22.3%	146
Seaside Resort	30.7%	19.0%	20.7%	148
A Private Campground	28.5%	17.1%	18.8%	152
A Camp Site in a Wilderness Setting (Not a Campground)	16.8%	7.2%	8.6%	195
Health Spa	9.6%	5.3%	5.9%	161
Wilderness Lodge You Can Drive to by Car	9.1%	5.0%	5.6%	161
Country Inn or Resort with Gourmet Restaurant	6.5%	4.8%	5.1%	128
Farm or Guest Ranch	5.1%	2.7%	3.0%	167
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	4.9%	4.4%	4.5%	109
On a Houseboat	3.2%	1.1%	1.4%	233
Remote or Fly-In Wilderness Lodge	3.1%	1.3%	1.6%	191
Remote or Fly-In Wilderness Outpost	0.9%	0.5%	0.6%	163
Cooking School	0.5%	0.3%	0.4%	140
Wine Tasting School	0.4%	0.2%	0.3%	160

Tours and Cruises Taken During Past Two Years

Skiers and Snowboarders frequently took tours and cruises while on trips during the last two years. They most often took sameday tours (both guided and non-guided), tours around a city and scenic countryside drives. However, relative to the average Canadian Pleasure Traveller, Skiers and Snowboarders were especially likely to have taken overnight tours (both guided & self-guided), wilderness tours, tours of wineries and factories and air tours by airplane or helicopter. Skiers and Snowboarders were somewhat less likely to have taken cruises than tours. However, they were somewhat more likely than the average Canadian Pleasure Traveller to have taken sightseeing cruises, Caribbean cruises and cruises on lakes or rivers. They were slightly less likely than average to have taken an Alaskan cruise or cruises on the Great Lakes or St. Lawrence River.

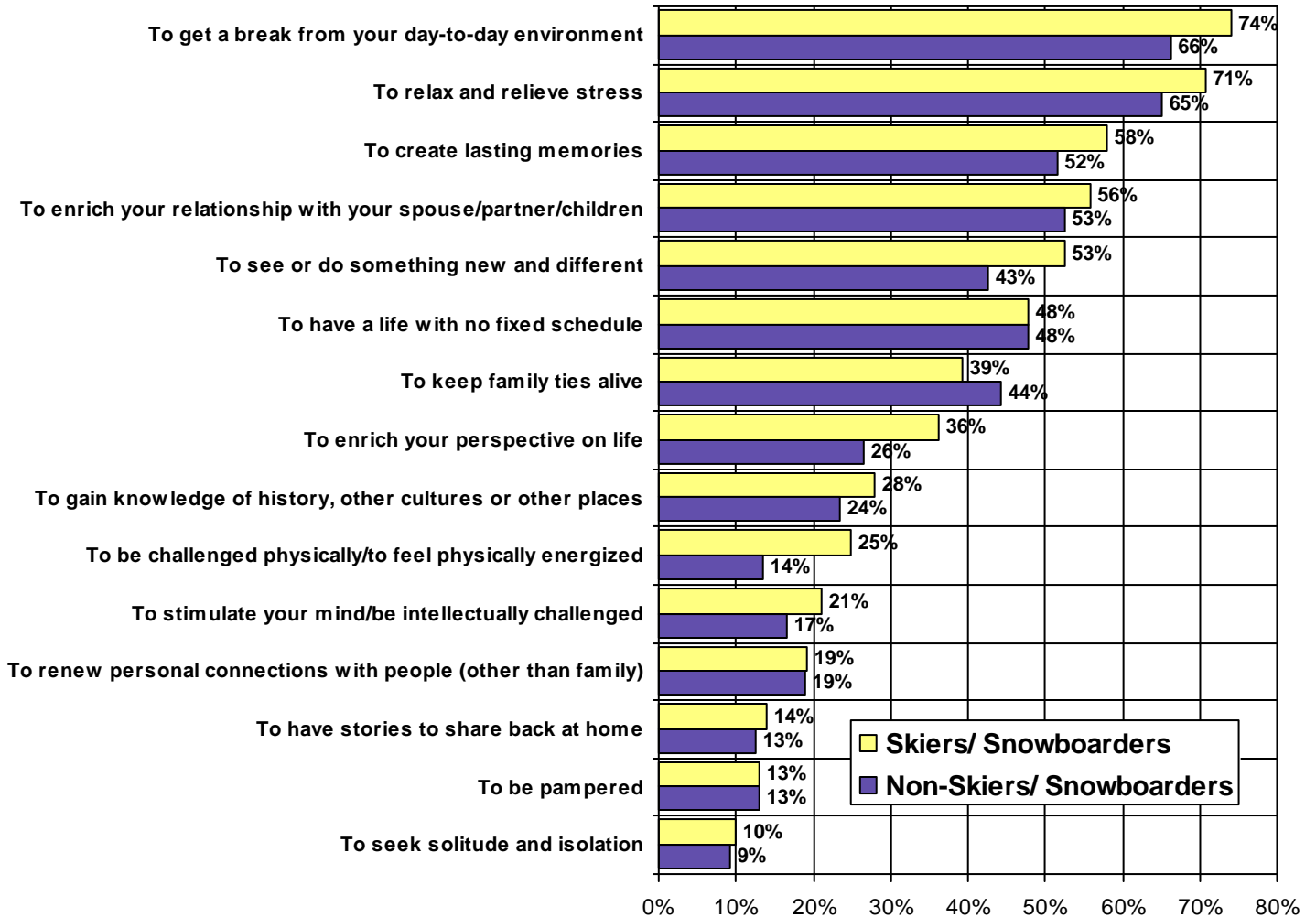
Fig. 11 Tours and Cruises Taken During Past Two Years

	Skiers/ Snowboarders	Non-Skiers/ Snowboarders	Pleasure Travellers	Index
Size of Market	2,698,842	15,740,667	18,439,508	100
A self-guided, sameday tour while on an overnight trip	41.7%	27.2%	29.3%	142
Around the city	34.2%	21.5%	23.4%	146
An organized, sameday guided tour while on an overnight trip	31.7%	20.6%	22.2%	143
Around the countryside - scenic drives	29.5%	21.2%	22.4%	132
A self-guided, overnight tour where you stayed in different locations	26.8%	16.6%	18.1%	148
Wilderness tour	22.6%	11.4%	13.0%	174
On the water (sightseeing cruise)	21.0%	11.7%	13.1%	161
An organized, overnight, guided tour where you stayed in different locations	14.4%	9.3%	10.1%	143
Some other type of tour	14.3%	9.1%	9.8%	145
An organized, overnight, guided tour where you stayed in a single location	11.2%	7.3%	7.8%	143
To a winery	10.4%	4.8%	5.6%	184
To a casino	7.9%	6.3%	6.5%	121
Caribbean ocean cruise	6.5%	5.2%	5.4%	121
To a factory	4.5%	2.3%	2.6%	171
Ocean cruise – Other	4.0%	3.2%	3.3%	122
In the air as a pilot or passenger of an airplane or helicopter	4.0%	1.5%	1.9%	209
Cruise on another lake or river	3.2%	2.2%	2.4%	135
Some other type of cruise	2.5%	1.4%	1.6%	157
Cruise on the St. Lawrence River	1.9%	2.0%	1.9%	97
Alaskan ocean cruise	1.2%	1.7%	1.6%	76
Great Lakes cruise	0.7%	0.8%	0.8%	92
Submarine cruise	0.2%	0.1%	0.1%	117

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travellers, Skiers and Snowboarders take vacations to get a break from their day-to-day environment, to relax and relieve stress, to create lasting memories, to enrich family relationships and to see or do something new and different. However, each of these common vacation benefits is more important to Skiers and Snowboarders than to other Canadian Pleasure Travellers. Skiers and Snowboarders are also more likely to seek vacations that are both intellectually stimulating (e.g., enrich their perspective on life, gain knowledge of the history or culture of a destination) and physically challenging. They are less likely to view vacations as opportunities to keep family ties alive.

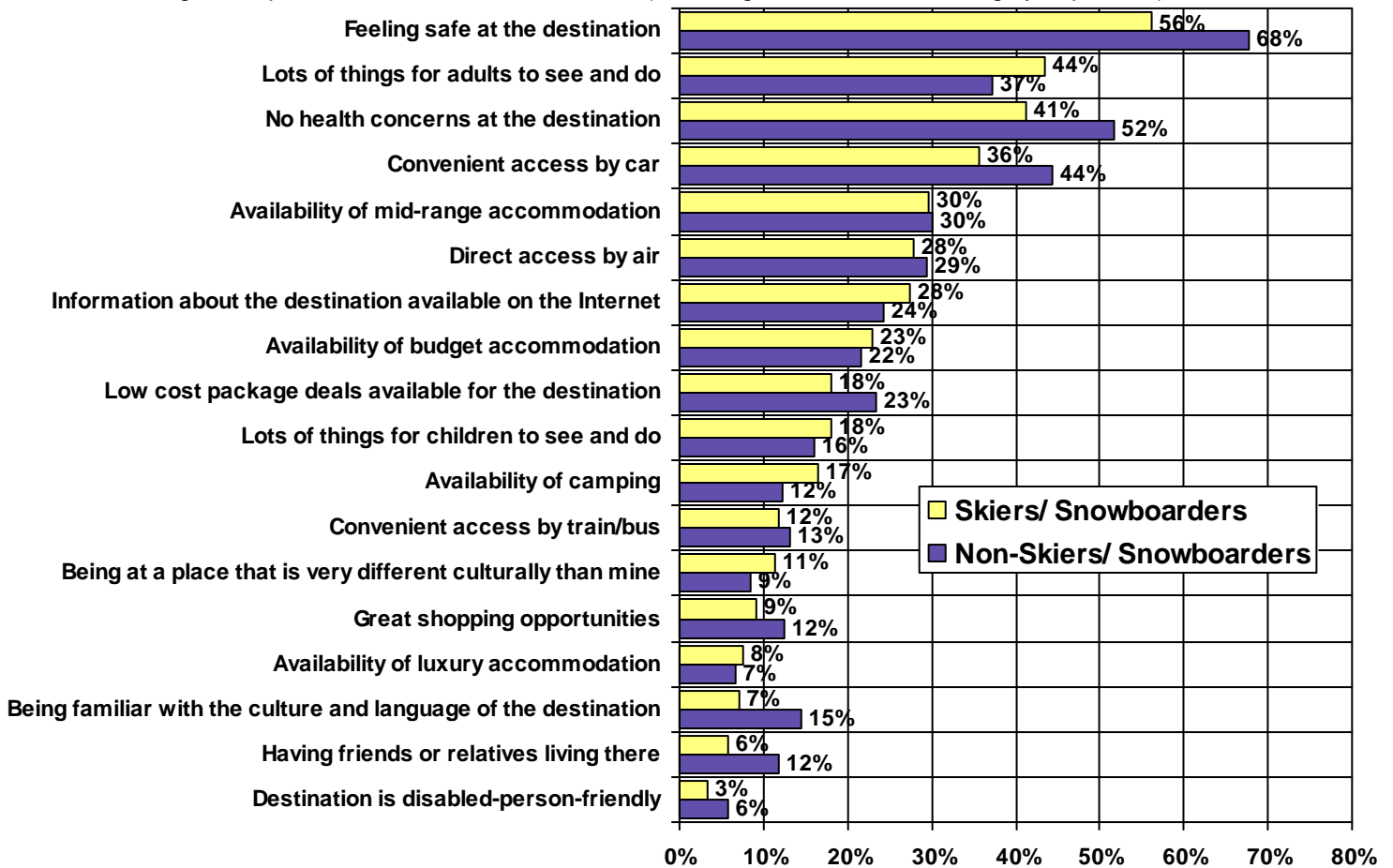
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travellers, Skiers and Snowboarders consider it important that they feel safe at a destination, albeit to a lesser extent than others. However, they are more likely to consider it important that a destination offers lots of things for adults to see and do, has camping facilities and has information readily available on the Internet. They consider it less important that the destination has no health concerns, is conveniently accessible by car, has a familiar culture and language and has friends and family living nearby.

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



How Destinations are Selected

Skiers and Snowboarders take different approaches when selecting destinations for summer and winter trips. Similar to the average Canadian Pleasure Traveller, Skiers and Snowboarders tend to begin planning summer trips with a desired destination in mind. However, for winter trips, Skiers and Snowboarders are much more likely than others to begin planning by considering what activities they would like to do. This is consistent with the fact that skiing and snowboarding is often identified as the main reason for taking a trip.

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

	Skiers/ Snowboarders	Non-Skiers/ Snowboarders	Pleasure Travellers	Index
Size of Market	2,698,842	15,740,667	18,439,508	100
Summer				
Started with a desired destination in mind	49.1%	48.4%	48.5%	101
Started by considering specific activities wanted to do	15.4%	13.5%	13.8%	111
Started with a certain type of vacation experience in mind	24.6%	23.6%	23.7%	104
Looked for packaged deals - no destination in mind	1.4%	1.3%	1.3%	110
Considered something else first	3.1%	4.5%	4.3%	71
Don't know / Other	6.5%	8.8%	8.4%	78
Winter				
Started with a desired destination in mind	39.3%	51.0%	48.6%	81
Started by considering specific activities wanted to do	33.4%	11.1%	15.6%	214
Started with a certain type of vacation experience in mind	14.9%	20.4%	19.3%	77
Looked for packaged deals - no destination in mind	2.8%	3.3%	3.2%	87
Considered something else first	3.2%	5.0%	4.7%	70
Don't know / Other	6.4%	9.2%	8.6%	74

Trip Planning and Information Sources Consulted

The majority of Skiers and Snowboarders participate in the planning of their trips either on their own (46.3%) or with someone else (13.2%). However, relative to the average Canadian Pleasure Traveller, Skiers and Snowboarders are more likely to plan trips on their own.

When making vacation plans, Skiers and Snowboarders consulted a wider variety of sources than the average Canadian Pleasure Traveller. The majority use the Internet, word-of-mouth and past experiences to plan trips. They are also more likely than others to obtain trip planning information from travel guidebooks such as Fodor's as well as television advertising and programming, newspaper and magazine advertising, electronic newsletters and trade, travel and sports shows.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Skiers/ Snowboarders	Non-Skiers/ Snowboarders	Pleasure Travellers	Index
Size of Market		2,698,842	15,740,667	18,439,508	100
Who Plans Trips?	Respondent plans trips	46.3%	41.2%	42.0%	110
	Trip planning a shared responsibility	13.2%	17.0%	16.4%	80
	Someone else plans trips	40.5%	41.7%	41.5%	97
Information Sources Consulted	An Internet website	83.1%	61.9%	65.2%	127
	Advice of others / Word-of-mouth	62.3%	49.1%	51.1%	122
	Past experience / Been there before	56.7%	49.2%	50.4%	113
	A travel agent	42.6%	32.6%	34.1%	125
	Maps	38.2%	31.5%	32.6%	117
	Official travel guides or brochures from state / province	33.4%	24.6%	26.0%	129
	Articles in newspapers/magazines	28.7%	19.4%	20.9%	137
	Visitor information centres	28.0%	22.5%	23.4%	120
	Travel guide books such as Fodor's	23.9%	11.7%	13.6%	175
	An auto club such as CAA	20.1%	17.2%	17.7%	114
	Advertisements in newspapers / magazines	19.9%	13.2%	14.3%	140
	Programs on television	11.3%	6.8%	7.5%	151
	Travel information received in the mail	10.6%	8.5%	8.8%	119
	Advertisements on television	7.1%	4.6%	5.0%	142
	An electronic newsletter or magazine received by e-mail	5.8%	3.9%	4.2%	140
Visits to trade, travel or sports shows	4.3%	2.9%	3.1%	137	

Use of the Internet to Plan and Arrange Trips

Skiers and Snowboarders are among the heaviest users of the Internet to plan (79.0%) and book (54.6%) travel. In fact, they were the most likely of the 21 outdoor activity types to use the Internet to plan travel and the second most likely to have actually purchased trip components online. The majority of Skiers and Snowboarders use hotel or resort websites, official tourism websites (e.g., travel websites of countries, regions or cities), travel planning or booking websites (e.g., Expedia) and airline websites to plan travel. The most commonly booked trip components include accommodation and airline tickets, however, Skiers and Snowboarders are much more likely than others to also arrange car rentals, purchase tickets or fees (e.g., specific activities, attractions, transportation fares) and buy vacation packages over the Internet.

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

		Skiers/ Snowboarders	Non-Skiers/ Snowboarders	Pleasure Travellers	Index
Size of Market		2,698,842	15,740,667	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	21.0%	44.3%	40.8%	51
	Uses Internet to plan trips only	24.4%	21.7%	22.1%	110
	Uses Internet to book part of trip	54.6%	34.0%	37.0%	148
Types of Websites Consulted	A website of a hotel or resort	63.3%	55.4%	57.0%	111
	A tourism website of a country / region / city	56.0%	48.3%	49.8%	112
	A travel planning/booking website	55.4%	43.3%	45.7%	121
	An airline website	54.4%	44.3%	46.3%	117
	A website of an attraction	38.9%	33.4%	34.5%	113
	Some other website	32.6%	26.3%	27.6%	118
	A cruise line website	7.9%	8.1%	8.1%	97
	A motorcoach website	2.4%	2.5%	2.5%	99
Parts of Trips Booked Over The Internet	Accommodation	78.1%	66.7%	69.2%	113
	Air tickets	74.8%	68.0%	69.5%	108
	Car rental	32.5%	25.7%	27.1%	120
	Tickets or fees for specific activities or attractions	29.1%	22.1%	23.6%	123
	Tickets for rail, bus or boat / ship fares	20.3%	13.9%	15.3%	133
	A package containing two or more items	20.0%	14.1%	15.4%	130
	Other	4.4%	3.8%	3.9%	111

Media Consumption Habits

Skiers and Snowboarders are more likely than the average Canadian Pleasure Traveller to visit travel websites and to read the travel sections of daily and weekend newspapers. This segment also exhibits particular interest in sports media including reading sports magazines (e.g., outdoor activities & sports, professional sports), watching sports programming on television, listening to all-sports radio and visiting sports-related websites. Skiers and Snowboarders can also be effectively targeted effectively through popular music radio stations (e.g., top 40/current hits radio, modern or alternative rock radio) and music video television shows and through business, finance and investing magazines.

Fig. 17 Media Consumption Habits

		Skiers/ Snowboarders	Non-Skiers/ Snowboarders	Pleasure Travellers	Index
	Size of Market	2,698,842	15,740,667	18,439,508	100
Newspaper Readership	Reads daily newspaper	86.7%	87.4%	87.3%	99
	Reads weekend edition of newspaper	86.6%	87.4%	87.3%	99
	Reads local neighbourhood or community newspapers	58.5%	62.1%	61.5%	95
	Reads other types of newspapers	16.3%	17.3%	17.2%	95
	Frequently or occasionally reads travel section of daily newspaper	49.4%	45.1%	45.7%	108
	Frequently or occasionally reads travel section of weekend newspaper	51.8%	46.6%	47.3%	109
Types of Magazines Read (Top 5 Indexed)	Outdoor activities / sports	20.4%	11.5%	12.8%	159
	Business, finance and investing	24.7%	14.9%	16.3%	152
	Professional sports	12.3%	7.9%	8.5%	144
	Computers, electronics and technology	14.0%	9.8%	10.4%	134
	Automobile and cycle magazines	17.1%	12.8%	13.4%	128
Type of Television Programs Watched (Top 5 Indexed)	Music / Music video shows / channels	30.5%	24.6%	25.5%	120
	Late night talk shows	32.2%	26.7%	27.5%	117
	Sports / sports shows	46.3%	42.8%	43.3%	107
	Reality shows (e.g., Canadian Idol)	41.1%	39.6%	39.8%	103
	Science fiction / Fantasy shows	19.7%	19.1%	19.2%	103
Type of Radio Programs Listened To (Top 5 Indexed)	Top 40 / Current hits	34.3%	23.6%	25.2%	136
	Modern rock / Alternative rock	49.8%	34.9%	37.1%	134
	Jazz / Big band	11.4%	8.3%	8.8%	130
	All sports	13.0%	10.7%	11.1%	117
	News / Talk/ Information	41.2%	39.1%	39.4%	105
Types of Websites Visited (Top 5 Indexed)	Sports	32.6%	25.7%	26.9%	121
	Travel	60.4%	48.5%	50.6%	119
	Sites for specific activities or interests	41.5%	34.7%	35.9%	116
	Shopping (all types)	37.9%	32.5%	33.5%	113
	Weather	63.0%	54.6%	56.1%	112

Appendix One: Canadian TAMS 2006 Outdoor Activity Segmentation

Activity Segment	Activities in Segment	
Golfing	Played During a Stay at a Golf Resort with Overnight Stay	Golf Tour Package to Play on Various Courses
	Played an Occasional Game While on a Trip	
Hunting	Hunting for Small Game	Hunting for Birds
	Hunting for Big Game	
Fishing	Fresh-Water Fishing	Salt-Water Fishing
	Ice Fishing	Trophy Fishing
Wildlife Viewing	Viewing Land Based Animals	Bird Watching
	Whale Watching & Other Marine Life	Visited National, Provincial /State Park
	Wildflowers /Flora Viewing	Viewing Northern Lights
Hiking, Climbing & Paddling	Mountain Climbing /Trekking	Fresh Water Kayaking /Canoeing
	Rock Climbing	Ocean Kayaking / Canoeing
	Hiking /Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
		White Water Rafting
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkeling in Sea /Ocean
	Sunbathing, Sitting on a Beach	Scuba Diving in Sea/Ocean
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Freshwater Scuba & Snorkeling	Scuba Diving in Lakes /Rivers	Snorkeling in Lakes /Rivers
Exercising & Jogging	Working Out in Fitness Centre	Jogging or Exercising Outdoors
Cycling	Overnight Touring Trip	Recreational - Same Day Excursion
	Mountain Biking	
Motorcycling	Overnight Touring Trip	Same Day Excursion
Horseback Riding	With an Overnight Stop	Same Day Excursion
Snowmobiling & ATVing	All Terrain Vehicle - Overnight Touring Trip	Snowmobiling As an Overnight Touring Trip
	All Terrain Vehicle - Same Day Excursion	Snowmobiling Day Use on Organized Trail
Downhill Skiing & Snowboarding	Snowboarding	Downhill Skiing
Cross-country Skiing & Snowshoeing	Cross-country Skiing	Cross-country or Back Country as an Overnight Touring Trip
	Snowshoeing	
Wilderness Activities	Wilderness Skills Courses	Dog Sledding
	Ice Climbing	
Skating	Ice Skating	In-Line /Rollerblading
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	
Team Sports	Ice Hockey	Curling
	Football	Basketball
	Baseball or Softball	Soccer
Sports & Games	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	

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