

CANADIAN TRAVEL MARKET

Snowmobiling & ATVing While on Trips Of One or More Nights

A Profile Report

October 25, 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



Snowmobiling and ATVing While on Trips

Executive Summary

Over the last two years, 8.4% (2,091,778) of adult Canadians used a snowmobile or all-terrain vehicle (ATV) while on an out-of-town, overnight trip of one or more nights. Snowmobiling and ATVing was the 13th most common outdoor activity undertaken by Canadian Pleasure Travellers in the last two years. ATV sameday excursions (5.6%) and snowmobile day use on an organized trail (3.4%) were much more common activities than ATVing on an overnight touring trip (1.6%) and snowmobiling on an overnight touring trip (1.2%). Of those who went snowmobiling or ATVing, 40.2% (840,100) reported that this activity was the main reason for taking at least one trip.

The majority of Snowmobile and ATVers are male (57.7%) and 18 to 44 years of age. They are over-represented among Young Singles, Young Couples and especially Young Families (children 12 or younger living at home). They are the second least likely of the 21 outdoor activity types to have a university education (22.7%) and their household incomes (\$77,737) ranked 14th overall. They are over-represented in the Prairie Provinces and the Atlantic Provinces.

Snowmobile and ATVers are less frequent travellers than most of the other outdoor activity types. They were the 9th most likely of the 21 outdoor activity types to have taken a trip within their own province or region (93.4%), the 20th most likely to have travelled to an adjacent province or region (51.6%) and the 17th most likely to have travelled to a non-adjacent province or region (35.0%) in the last two years. They were also the 19th most likely of the outdoor activity types to have travelled to the United States (49.1%), the 11th most likely to have visited Mexico (15.8%) and the 14th most likely to have taken a Caribbean trip (17.6%).

Snowmobile and ATVers are very active in nature-based activities such as hunting, fishing, camping and wilderness activities. They also enjoy motorcycling, horseback riding, team sports and a wide array of strenuous winter activities (e.g., downhill skiing and snowboarding, cross-country skiing and snowshoeing). They were quite active in culture and entertainment activities and exhibited special interest in sporting events, equestrian and western events (e.g. rodeos) and comedy festivals and clubs. They most often stay in public and private campgrounds and wilderness settings. They enjoy vacations that are relaxing, unstructured and offer solitude.

Snowmobile and ATVers are below-average users of the Internet to plan (59.2%) and book travel (34.2%). They also under-utilize travel-related media resources. They can be most effectively reached through sports-related media and automobile & cycle magazines and popular television programming (e.g., reality TV).

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 snowmobiling or ATVing 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.

Snowmobiling & ATVing While on Trips

Market Incidence

Over the last two years, 8.4% (2,091,778) of adult Canadians used snowmobiles or all-terrain vehicles (ATV) while on an out-of-town, overnight trip of one or more nights. Snowmobiling and ATVing was the 13th most common outdoor activity undertaken by Canadian Pleasure Travellers in the last two years. ATV sameday excursions (5.6%) and snowmobile day use on an organized trail (3.4%) were much more common than an ATV overnight touring trip (1.6%) and a snowmobile overnight touring trip (1.2%). 0.3% (67,481 adult Canadians) participated in all four snowmobile and ATV activities while on trips during the past two years.

Of those who went snowmobiling and ATVing, 40.3% (840,100) reported that this activity was the main reason for taking at least one trip in the past two years. Those who took a snowmobile overnight touring trip (76.7%) were more likely than other Snowmobile and ATVers to report that this activity was the main reason for taking at least one trip.

Fig. 1 Incidence of Snowmobiling & ATVing While on Trips¹

	Number of Snowmobile and ATVers ²	Percent Main Reason for Trip ³	Percent of Pleasure Travellers ⁴	Percent of Total Canadian Population ⁵
Size of Market	2,091,778	840,100	18,439,508	24,776,103
Snowmobiling & ATVing (All Activities)	2,091,778	40.2%	11.3%	8.4%
All-terrain vehicle (ATV) sameday excursion	1,399,392	30.0%	7.6%	5.6%
Snowmobile day use on an organized trail	834,302	44.5%	4.5%	3.4%
All-terrain vehicle (ATV) overnight touring trip	385,488	48.5%	2.1%	1.6%
Snowmobile overnight touring trip	308,803	76.7%	1.7%	1.2%
Participated in all four activities	67,481	37.3%	0.4%	0.3%

- 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 - "Snowmobile and ATVers" are defined as individuals who went snowmobiling or ATVing 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, overnight 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

Snowmobile and ATVers are over-represented in the Prairie Provinces (i.e., Saskatchewan, Alberta and Manitoba) and the Atlantic Provinces. They are less likely to live in Ontario and British Columbia.

Fig. 2 Geographic Distribution of Those Who Went Snowmobiling & ATVing While on Trips

	Total Population	Estimated Number Who Went Snowmobile & ATVing on a Trip	Percent of Pleasure Travellers in Region Who Went Snowmobile & ATVing on a Trip	Percent of Total Regional Population Who Went Snowmobile & ATVing on a Trip
Canada	24,776,103	2,091,778	11.3%	8.4%
Atlantic Provinces	1,822,494	179,141	14.1%	9.8%
Quebec	5,940,869	532,325	12.7%	9.0%
Ontario	9,671,592	687,393	9.6%	7.1%
Manitoba	843,107	74,165	12.5%	8.8%
Saskatchewan	706,325	74,585	13.8%	10.6%
Alberta	2,465,540	300,999	15.0%	12.2%
British Columbia	3,326,176	243,170	9.1%	7.3%

Demographic Profile

The majority of Snowmobile and ATVers are male (57.7%) and 18 to 44 years of age. They are over-represented among Young Singles, Young Couples and Young Families with children 12 and younger living at home. They are the second least likely of the 21 outdoor activity types to have a university education (22.7%). Their household incomes (\$77,737) were slightly above that of the average Canadian Pleasure Traveller.

Fig. 3 Demographic Profile of Snowmobile and ATVers Relative to All Canadian Pleasure Travellers

Attribute	Size of Market	Snowmobile and ATVers	Non-Snowmobile and ATVers ¹	Pleasure Travellers	Index ²
		2,091,778	16,347,730	18,439,508	100
Gender	Male	57.7%	47.7%	48.8%	118
	Female	42.3%	52.3%	51.2%	83
Age of Respondent	18 to 24	18.2%	12.1%	12.8%	142
	25 to 34	24.6%	18.6%	19.3%	127
	35 to 44	25.9%	19.9%	20.5%	126
	45 to 54	18.3%	20.6%	20.3%	90
	55 to 64	8.6%	14.8%	14.1%	61
	65 Plus	4.5%	14.0%	12.9%	35
Average Age		38.8	45.3	44.5	N/A
Marital Status	Not married	31.2%	32.3%	32.2%	97
	Married	68.8%	67.7%	67.8%	101
Parental Status	No children under 18	67.3%	71.6%	71.1%	95
	Children under 18	32.7%	28.4%	28.9%	113
Education	High school or less	39.0%	35.9%	36.2%	108
	Some post-secondary	13.4%	10.9%	11.2%	120
	Post-secondary diploma/certificate	24.9%	21.5%	21.9%	114
	University degree	22.7%	31.7%	30.7%	74
Household Income	Under \$20,000	4.9%	5.8%	5.7%	85
	\$20,000 to \$39,999	11.8%	14.8%	14.5%	81
	\$40,000 to \$59,999	15.8%	16.6%	16.5%	96
	\$60,000 to \$79,999	15.2%	15.2%	15.2%	100
	\$80,000 to \$99,999	13.3%	12.1%	12.2%	109
	\$100,000 or more	27.2%	22.3%	22.8%	119
	Not stated	11.8%	13.1%	13.0%	91
Average Household Income		\$77,737	\$72,192	\$72,829	N/A

- 1 - "Non-Snowmobile and ATVers" are defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years but did not go snowmobiling or ATVing on any trip. The number of Snowmobile and ATVers and Non-Snowmobile and ATVers equals the number of Pleasure Travellers.
- 2 - The "Index" is calculated by dividing the percent for Snowmobile and ATVers in each group by the percent of Pleasure Travellers in each group. The Index indicates the extent to which Snowmobile and ATVers 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)

Snowmobile and ATVers (98.1%) were more likely than the average Canadian Pleasure Traveller (94.8%) to take an overnight trip within Canada during the past two years. However, Snowmobile and ATVers are generally less frequent travellers than most of the other outdoor activity types. They were the 9th most likely of the 21 outdoor activity types to have taken a trip within their own province or region (93.4%), the 20th most likely to have travelled to an adjacent province or region (51.6%) and the 17th most likely to have travelled to a non-adjacent province or region (35.0%) in the last two years.

In terms of out-of-country travel, Snowmobile and ATVers were the 19th most likely of the outdoor activity types to have travelled to the United States (49.1%), the 11th most likely to have visited Mexico (15.8%), the 14th most likely to have taken a Caribbean trip (17.6%) and the 20th most likely to have taken an overseas trip (25.1%).

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

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travellers	Index
Size of Market	2,091,778	16,347,730	18,439,508	100
Canada	98.1%	94.3%	94.8%	104
Took a trip within own province / region	93.4%	84.9%	85.9%	109
Took a trip to an adjacent province / region	51.6%	48.2%	48.6%	106
Took a trip to non-adjacent province / region	35.0%	31.0%	31.4%	111
Newfoundland and Labrador	7.2%	3.9%	4.3%	167
Prince Edward Island	6.8%	7.2%	7.2%	95
New Brunswick	11.6%	11.9%	11.8%	98
Nova Scotia	14.7%	12.4%	12.7%	116
Quebec	41.4%	38.6%	38.9%	106
Ontario	53.2%	53.6%	53.5%	99
Manitoba	11.0%	8.9%	9.2%	120
Saskatchewan	15.7%	10.8%	11.4%	138
Alberta	31.2%	25.2%	25.8%	121
British Columbia	31.7%	30.5%	30.6%	103
Yukon	1.2%	1.0%	1.0%	120
Northwest Territories	1.6%	0.5%	0.7%	235
Nunavut	0.6%	0.2%	0.3%	216
United States	49.1%	50.9%	50.7%	97
Mexico	15.8%	11.9%	12.4%	128
Caribbean	17.6%	15.3%	15.6%	113
All other destinations	18.9%	24.3%	23.6%	80

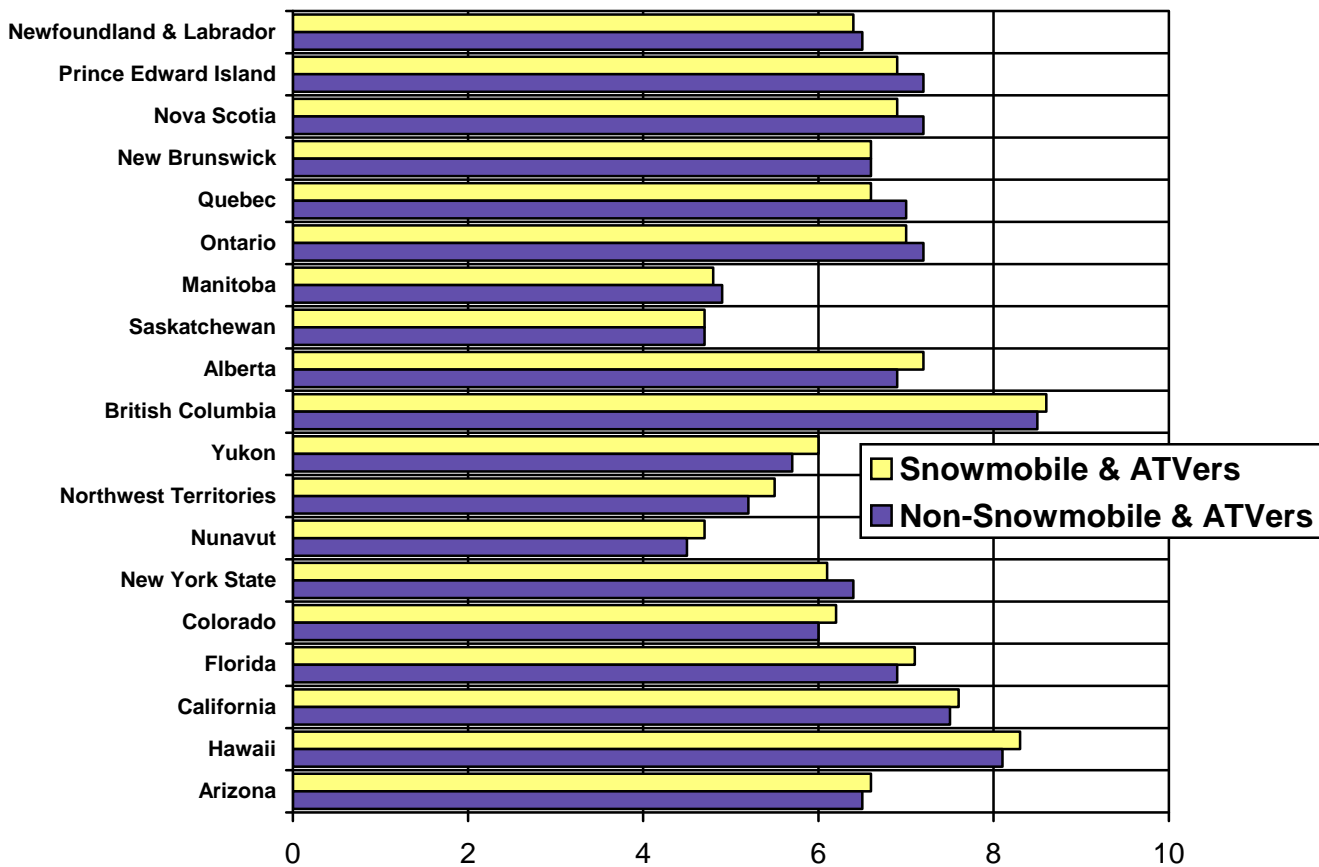
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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 Snowmobile and ATVer were comparable to those of other Canadian Pleasure Travellers for most Canadian destinations. This segment rated British Columbia (8.6) as the most appealing among all destinations. The next most appealing Canadian province was Alberta (7.2). The Yukon, Northwest Territories and Nunavut were rated as more appealing by this segment than by others.

Among the U.S. reference states, the southern states tended to be slightly more appealing to Snowmobile and ATVer than to others (e.g., California, Florida, Colorado). Hawaii (8.3) and California (7.6) received the highest ratings from this segment.

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

Snowmobile and ATVers were quite active in outdoor activities relative to the average Canadian Pleasure Traveller. The majority of Snowmobile and ATVers went boating and swimming (e.g., motorboating, swimming in lake), participated in ocean activities (e.g., sunbathing, swimming in ocean), went wildlife viewing and fishing while on trips.

Snowmobile and ATVers were much more active than the average Canadian Pleasure Traveller in nature-based activities such as hunting, fishing, freshwater scuba diving and snorkeling and wilderness activities. They also exhibit considerable interest in skating, motorcycling, horseback riding, team sports and extreme air sports while on trips. In part, this activity pattern reflects the fact that this is a comparably young, male-dominated segment. These attributes tend to be associated with higher levels of outdoor physical activity.

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

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travellers	Index
Size of Market	2,091,778	16,347,730	18,439,508	100
Boating & Swimming (e.g., motorboating, swimming in lakes)	64.9%	38.1%	41.1%	158
Ocean Activities (e.g., swimming in ocean, sunbathing)	58.6%	47.3%	48.5%	121
Wildlife Viewing	51.5%	39.9%	41.2%	125
Fishing	50.5%	20.2%	23.6%	214
Hiking, Climbing & Paddling	43.0%	32.9%	34.1%	126
Sports & Games (e.g., tennis, board games)	33.3%	21.4%	22.7%	147
Golfing	27.1%	17.2%	18.3%	148
Skating (e.g., ice skating, rollerblading)	23.7%	10.4%	12.0%	199
Downhill Skiing & Snowboarding	22.6%	13.6%	14.6%	154
Exercising & Jogging	22.0%	15.1%	15.9%	138
Team Sports (e.g., hockey, baseball)	21.5%	10.1%	11.4%	189
Cycling	20.0%	12.7%	13.5%	148
Hunting	19.5%	2.8%	4.7%	414
Cross-country Skiing & Snowshoeing	14.1%	8.7%	9.3%	152
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	11.3%	5.6%	6.3%	180
Horseback Riding	8.9%	4.4%	4.9%	181
Motorcycling	8.1%	2.3%	3.0%	271
Freshwater Scuba & Snorkeling	6.5%	2.6%	3.0%	217
Wilderness Activities (e.g., wilderness skills course)	5.5%	2.0%	2.4%	234
Extreme Air Sports (e.g., parachuting)	3.1%	0.9%	1.1%	277

Outdoor Activities Pursued in a Typical Year

Snowmobile and ATVers are also quite active in outdoor activities while not traveling. In addition to riding an ATV, they frequently went on day outings, swimming, camping and gardened at home. Relative to the average Canadian Pleasure Traveller, they were especially likely to go hunting, fishing, snowboarding, sailing and other boating and horseback riding while not traveling.

Fig. 7 Outdoor Activities Pursued in a Typical Year

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travellers	Index
Size of Market	2,091,778	16,347,730	18,439,508	100
Swimming	67.3%	59.4%	60.3%	112
Day outing to a park	65.8%	67.0%	66.9%	98
Camping	59.2%	36.0%	38.6%	153
Gardening	59.2%	59.8%	59.8%	99
Exercising at home or at a fitness club	58.0%	61.4%	61.0%	95
Riding an all-terrain vehicle (ATV)	53.1%	9.3%	14.3%	372
Picnicking	52.9%	53.1%	53.1%	100
Cycling	52.7%	43.2%	44.3%	119
Hiking	51.9%	48.4%	48.8%	106
Fishing	51.6%	26.4%	29.3%	176
Ice-skating	40.3%	27.0%	28.5%	141
Golfing	40.1%	28.0%	29.4%	137
Sailing or other boating	38.3%	21.5%	23.4%	163
Snowmobiling	38.1%	6.1%	9.8%	390
Playing team sports	33.1%	21.6%	22.9%	144
Jogging	27.3%	23.6%	24.1%	114
Canoeing or kayaking	23.8%	16.0%	16.9%	141
Playing racquet sports (e.g., tennis or badminton)	22.7%	18.7%	19.1%	119
Rollerblading	22.1%	13.4%	14.4%	154
Downhill skiing	22.1%	15.4%	16.2%	136
Hunting	21.8%	5.9%	7.7%	281
Cross-country skiing	13.9%	12.3%	12.5%	112
Horseback riding	10.6%	6.3%	6.8%	155
Snowboarding	9.2%	4.5%	5.0%	182
Skateboarding	2.5%	1.5%	1.6%	160

Culture and Entertainment Activities Pursued While on Trips

Snowmobile and ATVers were also more active in most culture and entertainment activities while on trips than the average Canadian Pleasure Traveller. Snowmobile and ATVers were also particularly more likely than average to attend comedy festivals and clubs, equestrian and western events, sporting events (e.g., professional sporting events, amateur tournaments, national & international sporting events) and to participate in agro-tourism activities 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)

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travellers	Index
Size of Market	2,091,778	16,347,730	18,439,508	100
Shopping & Dining	86.1%	82.5%	82.9%	104
Historical Sites, Museums & Art Galleries	60.2%	58.1%	58.3%	103
Theme Parks & Exhibits	52.0%	37.5%	39.2%	133
Fairs & Festivals	50.6%	36.0%	37.7%	134
Musical Concerts, Festivals & Attractions	44.1%	31.3%	32.7%	135
Casinos	31.9%	25.1%	25.9%	123
Science & Technology Exhibits	29.1%	22.4%	23.1%	126
Wine, Beer & Food Tastings	27.5%	23.3%	23.8%	115
Professional Sporting Events	23.1%	14.7%	15.7%	148
Agro-Tourism	22.7%	14.8%	15.7%	144
Live Theatre	22.5%	20.9%	21.1%	107
Comedy Festivals & Clubs	18.4%	9.1%	10.1%	181
Amateur Tournaments	17.9%	11.0%	11.8%	152
Garden Theme Attractions	17.3%	17.6%	17.6%	98
Aboriginal Cultural Experiences	14.6%	11.2%	11.6%	126
Spas	14.2%	9.5%	10.0%	141
High Art Performances	11.5%	10.9%	11.0%	105
Equestrian & Western Events	10.8%	6.1%	6.7%	162
Participatory Historical Activities	6.6%	6.7%	6.7%	99
National & International Sporting Events	4.7%	3.0%	3.2%	146
Literary & Film Festivals	4.2%	2.4%	2.6%	161

Culture and Entertainment Activities Pursued in a Typical Year

When not traveling, Snowmobile and ATVers frequently dine in local restaurants, visit local festivals and fairs and attend local amateur sporting events. Relative to the average Canadian Pleasure Traveller, they are especially likely to attend local rodeos, go dancing and attend local rock music performances (e.g., bars with live pop or rock bands, rock music concerts). They are less likely than average to patronize local live arts performances (e.g., opera, ballet, classical music concerts, live theatre) or visit local museums and galleries. In part, this may reflect the fact that many in this segment are situated in rural areas or smaller towns where such activities are not available.

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

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travellers	Index
Size of Market	2,091,778	16,347,730	18,439,508	100
Going out to eat in restaurants	93.0%	91.3%	91.5%	102
Going to festivals or fairs	63.4%	61.2%	61.4%	103
Going to amateur sporting events	51.7%	40.8%	42.0%	123
Going to bars with live pop or rock bands	42.9%	25.8%	27.7%	155
Going to pick-your-own farms or farmers' market	38.7%	41.3%	41.0%	94
Going to professional sporting events	38.4%	31.2%	32.1%	120
Going dancing	37.4%	28.9%	29.9%	125
Going to historic sites or heritage buildings	35.5%	39.8%	39.3%	90
Going to amusement or theme parks	34.0%	28.2%	28.9%	118
Going to zoos or aquariums	33.9%	30.0%	30.4%	111
Going to rock music concerts	33.0%	21.1%	22.4%	147
Going to live theatre	25.9%	35.9%	34.8%	74
Going to museums	24.8%	33.7%	32.7%	76
Going to art galleries or art shows	24.8%	32.7%	31.8%	78
Going to gamble in casinos	20.8%	17.8%	18.1%	115
Going to botanical gardens	19.0%	26.2%	25.4%	75
Going to day spas	15.5%	13.5%	13.8%	113
Going to rodeos	11.9%	6.7%	7.3%	162
Staying overnight in a hotel or B&B in own city	11.8%	9.6%	9.9%	119
Going to classical music concerts	9.9%	17.4%	16.5%	60
Going to jazz clubs	6.6%	7.6%	7.5%	88
Going to the ballet	4.7%	7.6%	7.3%	65
Going to the opera	3.9%	6.9%	6.6%	59

Accommodation Stayed In While on a Trip

Relative to the average Canadian Pleasure Traveller, Snowmobile and ATVers were much more likely to go camping in public and private campgrounds and in wilderness settings (e.g., wilderness campsite, a wilderness lodge accessible by car, and remote or fly-in wilderness lodge or outpost). They were also more likely to have used some of the more unusual types of accommodation in the past two years including a motor home or RV, a farm or guest ranch and a houseboat.

Fig. 10 Accommodation Stayed in While on Trips

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travellers	Index
Size of Market	2,091,778	16,347,730	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	39.8%	24.6%	26.4%	151
A Private Campground	32.9%	17.0%	18.8%	175
Lakeside / Riverside Resort	28.5%	21.5%	22.3%	128
Seaside Resort	24.1%	20.3%	20.7%	116
A Camp Site in a Wilderness Setting (Not a Campground)	21.7%	6.9%	8.6%	253
Ski Resort or Mountain Resort	18.4%	13.4%	13.9%	132
Wilderness Lodge You Can Drive to by Car	12.5%	4.7%	5.6%	222
Health Spa	8.7%	5.6%	5.9%	146
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	8.0%	4.0%	4.5%	179
Country Inn or Resort with Gourmet Restaurant	7.6%	4.8%	5.1%	150
Farm or Guest Ranch	6.6%	2.6%	3.0%	218
Remote or Fly-In Wilderness Lodge	3.9%	1.3%	1.6%	244
On a Houseboat	3.1%	1.1%	1.4%	230
Remote or Fly-In Wilderness Outpost	1.8%	0.4%	0.6%	324
Wine Tasting School	0.4%	0.2%	0.3%	158
Cooking School	0.4%	0.3%	0.4%	109

Tours and Cruises Taken During Past Two Years

Snowmobile and ATVers were more likely than the average Canadian Pleasure Traveller to have taken most types of tours and cruises in the past two years. Sameday tours (both guided and non-guided), scenic countryside drives and city tours were the most popular in this segment. However, in relative terms, Snowmobile and ATVers were much more likely to have taken wilderness tours, an air tour in an airplane or helicopter and fresh-water cruises (e.g., Great Lakes cruises, river or lake cruises). They were also more likely to have toured a casino or factory than the typical Canadian Pleasure Traveller.

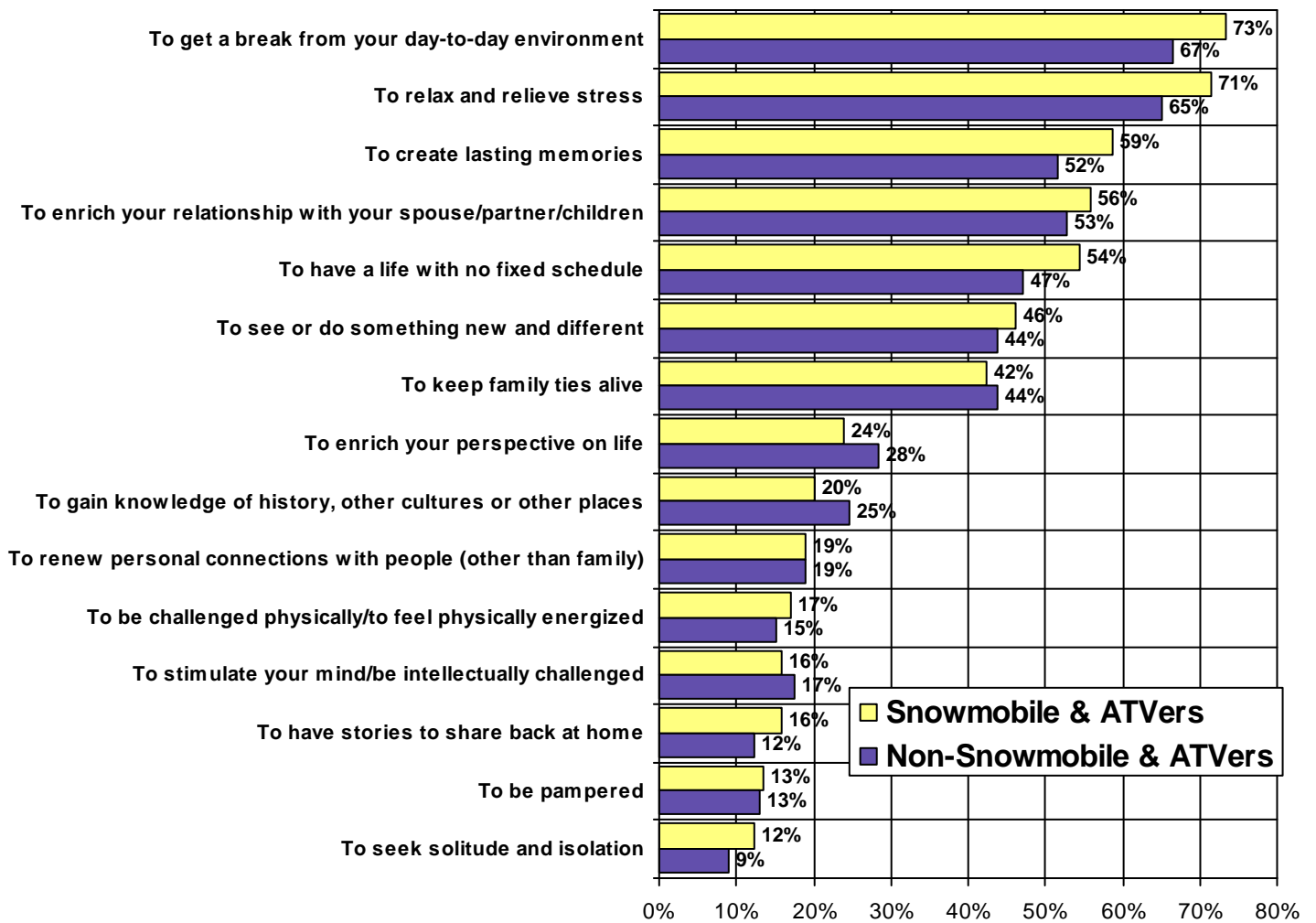
Fig. 11 Tours and Cruises Taken During Past Two Years

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travellers	Index
Size of Market	2,091,778	16,347,730	18,439,508	100
A self-guided, sameday tour while on an overnight trip	35.0%	28.6%	29.3%	120
Around the countryside - scenic drives	27.0%	21.9%	22.4%	120
An organized, sameday guided tour while on an overnight trip	26.8%	21.6%	22.2%	121
Around the city	26.0%	23.0%	23.4%	111
Wilderness tour	21.5%	11.9%	13.0%	166
A self-guided, overnight tour where you stayed in different locations	20.7%	17.8%	18.1%	114
On the water (sightseeing cruise)	19.0%	12.3%	13.1%	145
Some other type of tour	12.2%	9.5%	9.8%	124
An organized, overnight, guided tour where you stayed in different locations	10.8%	10.0%	10.1%	107
An organized, overnight, guided tour where you stayed in a single location	10.2%	7.5%	7.8%	130
To a casino	9.2%	6.2%	6.5%	141
To a winery	5.5%	5.7%	5.6%	97
Caribbean ocean cruise	4.8%	5.5%	5.4%	88
To a factory	4.0%	2.5%	2.6%	151
Cruise on another lake or river	3.6%	2.2%	2.4%	153
Ocean cruise - Other	3.5%	3.3%	3.3%	104
In the air as a pilot or passenger of an airplane or helicopter	3.4%	1.7%	1.9%	180
Cruise on the St. Lawrence River	1.7%	2.0%	1.9%	89
Some other type of cruise	1.5%	1.6%	1.6%	97
Great Lakes cruise	1.3%	0.7%	0.8%	166
Alaskan ocean cruise	1.1%	1.7%	1.6%	66
Submarine cruise	0.1%	0.1%	0.1%	92

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travellers, the majority of Snowmobile and ATVs 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 live without a fixed schedule. Relative to other Canadian Pleasure Travellers, Snowmobile and ATVs tend to place particular importance on leisurely vacations (e.g., get a break from their daily environment, relax & relieve stress, no fixed schedule) that offer memorable experiences. They are less likely to view vacations as opportunities to be intellectually stimulated.

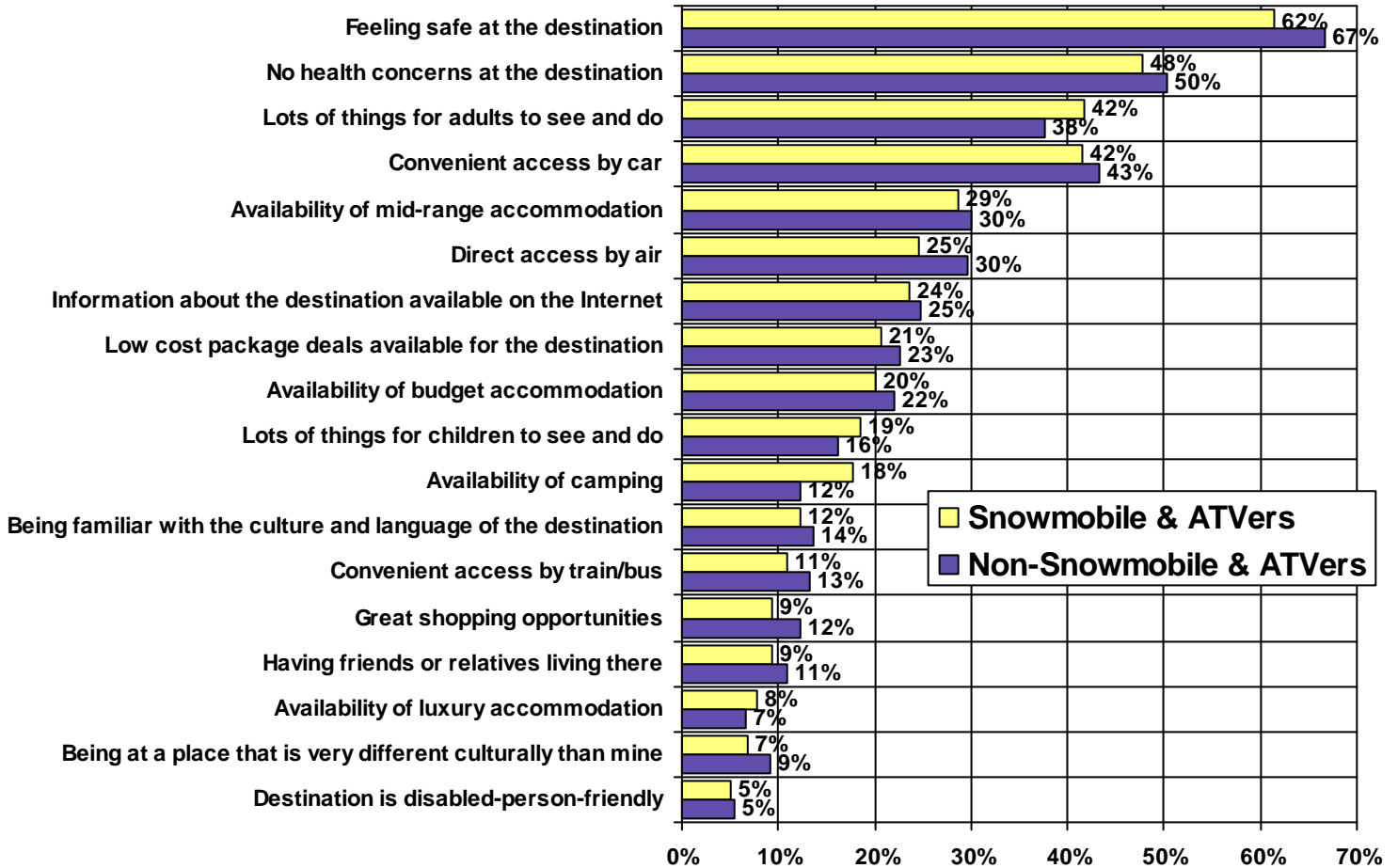
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travellers, the majority of Snowmobile and ATVer consider it important to feel safe at a destination, although to a lesser extent than others. Relative to others, Snowmobile and ATVer are more likely to consider it important that a destination has camping available.

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



How Destinations are Selected

Similar to the average Canadian Pleasure Traveller, Snowmobile and ATVers tend to start planning vacations with a particular destination in mind. However, they are more likely than the average Canadian Pleasure Traveller to begin their planning by considering what types of activities they would like to do while on a trip.

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

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travellers	Index
Size of Market	2,091,778	16,347,730	18,439,508	100
Summer				
Started with a desired destination in mind	44.9%	48.9%	48.5%	93
Started by considering specific activities wanted to do	17.5%	13.3%	13.8%	127
Started with a certain type of vacation experience in mind	24.7%	23.6%	23.7%	104
Looked for packaged deals – no destination in mind	1.0%	1.3%	1.3%	79
Considered something else first	3.6%	4.4%	4.3%	83
Don't know / Other	8.3%	8.4%	8.4%	98
Winter				
Started with a desired destination in mind	44.9%	49.2%	48.6%	92
Started by considering specific activities wanted to do	20.0%	14.9%	15.6%	128
Started with a certain type of vacation experience in mind	20.3%	19.1%	19.3%	105
Looked for packaged deals – no destination in mind	3.0%	3.2%	3.2%	93
Considered something else first	3.9%	4.8%	4.7%	84
Don't know / Other	8.0%	8.8%	8.6%	92

Trip Planning and Information Sources Consulted

The majority of Snowmobile and ATVers were responsible for planning their trips either on their own (39.1%) or with someone else (16.7%). When making vacation plans, the majority use the Internet, word-of-mouth and past experiences as primary sources for travel information. Relative to the average Canadian Pleasure Traveller, Snowmobile and ATVers are more likely to obtain travel information from television programs and television advertising and from trade, travel or sports shows.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travellers	Index
Size of Market		2,091,778	16,347,730	18,439,508	100
Who Plans Trips?	Respondent plans trips	39.1%	42.4%	42.0%	93
	Trip planning a shared responsibility	16.7%	16.4%	16.4%	102
	Someone else plans trips	44.2%	41.2%	41.5%	106
Information Sources Consulted	An Internet website	65.3%	65.2%	65.2%	100
	Advice of others / Word-of-mouth	63.3%	49.6%	51.1%	124
	Past experience / Been there before	55.5%	49.7%	50.4%	110
	Maps	34.5%	32.3%	32.6%	106
	A travel agent	33.0%	34.3%	34.1%	97
	Official travel guides or brochures from state / province	26.4%	25.9%	26.0%	102
	Visitor information centres	22.7%	23.5%	23.4%	97
	Articles in newspapers / magazines	21.5%	20.8%	20.9%	103
	Advertisements in newspapers / magazines	15.4%	14.1%	14.3%	108
	An auto club such as CAA	13.8%	18.2%	17.7%	78
	Travel guide books such as Fodor's	12.4%	13.8%	13.6%	91
	Programs on television	10.3%	7.2%	7.5%	137
	Travel information received in the mail	9.3%	8.8%	8.8%	105
	Visits to trade, travel or sports shows	7.1%	2.6%	3.1%	226
	Advertisements on television	6.8%	4.8%	5.0%	136
An electronic newsletter or magazine received by e-mail	4.5%	4.1%	4.2%	107	

Use of the Internet to Plan and Arrange Trips

Snowmobile and ATVers are less likely to use the Internet to plan (59.2%) and book (34.2%) travel than the average Canadian Pleasure Traveller. In fact, this segment was the 19th most likely of the 21 outdoor activity types to plan and book travel. Most in this segment have used the Internet to consult hotel or resort websites. The most commonly purchased trip components using the Internet were accommodation and airline tickets. However, Snowmobile and ATVers are more likely than others to have booked a vacation package over the Internet.

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

		Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travellers	Index
	Size of Market	2,091,778	16,347,730	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	40.8%	40.8%	40.8%	100
	Uses Internet to plan trips only	25.0%	21.8%	22.1%	113
	Uses Internet to book part of trip	34.2%	37.4%	37.0%	92
Types of Websites Consulted	A website of a hotel or resort	54.5%	57.3%	57.0%	96
	A tourism website of a country / region / city	46.7%	50.2%	49.8%	94
	A travel planning / booking website	45.7%	45.7%	45.7%	100
	An airline website	44.4%	46.6%	46.3%	96
	A website of an attraction	33.9%	34.5%	34.5%	98
	Some other website	30.7%	27.2%	27.6%	111
	A cruise line website	7.6%	8.1%	8.1%	94
	A motorcoach website	2.4%	2.5%	2.5%	98
Parts of Trips Booked Over The Internet	Accommodation	71.9%	68.8%	69.2%	104
	Air tickets	69.9%	69.4%	69.5%	101
	Tickets or fees for specific activities or attractions	28.0%	23.1%	23.6%	119
	Car rental	25.0%	27.4%	27.1%	92
	A package containing two or more items	24.9%	14.3%	15.4%	161
	Tickets for rail, bus or boat / ship fares	17.1%	15.1%	15.3%	112
	Other	6.4%	3.6%	3.9%	163

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		
Activity Segment	Activities in Segment	
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