

# THE CANADIAN MARKET FOR HIKING, CLIMBING & PADDLING EXPERIENCES IN ALBERTA



TAMS



A SPECIAL ANALYSIS OF THE 2006 TRAVEL ACTIVITIES AND MOTIVATION SURVEY

# **The Canadian Market for Hikers, Climbers & Paddlers in Alberta**

A Special Analysis of the  
2006 Travel Activities and Motivation Survey (TAMS)

Presented to

**Alberta Tourism, Parks, Recreation and Culture**

Presented by

**Research Resolutions  
& Consulting Ltd.**



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## I. Introduction

### A. Background and Objectives

Visitors engage in tourism activities based on their personal interests and requirements, selecting from the many and varied types of experiences offered at their destinations. They can be grouped into market segments or *activity-based* sectors, reflecting the experiences they seek when they travel – to Alberta or elsewhere.

Whether in its cities, towns or countryside, Alberta clearly offers a wide array of tourism experiences and attracts tourists from many different sectors. By learning more about Canadians who are in the market for some of these travel experiences, Alberta's tourism businesses can more effectively target their products and marketing efforts to attract tourists.

To support these efforts, *Alberta Tourism, Parks, Recreation and Culture* (ATPRC) selected the following array of activity-based sectors as the focus of a series of Canadian tourist profiles based on the 2006 Travel Activities and Motivation Survey (TAMS).<sup>1</sup>

- Cultural Tourists
- Fairs & Festivals Tourists
- Hikers, Climbers & Paddlers
- Archaeological & Palaeontological Tourists
- Aboriginal Culture Tourists

ATPRC commissioned Research Resolutions & Consulting Ltd. to prepare the Canadian tourist profiles. This profile describes **Hikers, Climbers & Paddlers**.

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<sup>1</sup> See Appendix A for a brief description of the TAMS study.

## B. The Regional & Long-Haul Canadian Markets

Reflecting the realities of the Canadian marketplace and the need for different promotional and marketing strategies for Canadians who reside in or near Alberta and those who live further away, Canadian tourists are divided into two distinct groups:

- **Regional Canadian Market** – Canadians who reside in British Columbia, Alberta, Saskatchewan and Manitoba;
- **Long-Haul Canadian Market** – Canadians who reside in Ontario, Québec, and the four Atlantic provinces.<sup>2</sup>

To aid the reader, this report provides common introductory sections, followed by an overview of shared characteristics of the Regional and Long-Haul Canadian Hikers, Climbers & Paddlers and separate executive summaries for each of the Regional and Long-Haul tourism market segments.

Subsequently, the reader will find stand-alone chapters, each dedicated to one of these geographically distinct groups of Canadian adults. In each chapter, summary tables display the sector in total and the subsets that have or have *not* travelled within Alberta over the past decade.<sup>3</sup>

### Report Structure

- I. Introduction
- II. Executive Summaries
  - A. Overview of the Canadian Market for Hikers, Climbers & Paddlers in Alberta
  - B. Summary: Regional Canadian Market for Hikers, Climbers & Paddlers in Alberta
  - C. Summary: Long-Haul Canadian Market for Hikers, Climbers & Paddlers in Alberta
- III. Regional Canadian Hikers, Climbers & Paddlers - Detailed Findings
- IV. Long-Haul Canadian Hikers, Climbers & Paddlers - Detailed Findings
- V. Appendices

<sup>2</sup> The TAMS Canada study was not conducted among residents of Canada's territories.

<sup>3</sup> Because Regional Canadian Hikers, Climbers & Paddlers include Alberta residents, those who have travelled in the province over the past decade on an overnight trip for any purpose are labelled *Travellers within/to Alberta*. In the Long-Haul Canadian Hikers, Climbers & Paddlers analysis, these travellers are labelled *Travellers to Alberta*. Regardless of their place of residence, sector members who have not taken an overnight trip to or within Alberta for any purpose over the past ten years are labelled *Non-Alberta Travellers*.

### C. Defining Canadian Hikers, Climbers & Paddlers

This report provides information about **Canadian Hikers, Climbers & Paddlers**. These individuals are defined to include Canadian adults (18 years of age or over) who claim to have taken an overnight pleasure trip to any destination in the past two years and indicate that at least one of the following activities was the *main reason* for at least one of the overnight trips they took over this time period.<sup>4</sup> These travellers are referred to in this report as *Hikers, Climbers & Paddlers, outdoor-oriented enthusiasts* and/or *outdoor enthusiasts*.

#### Kayaking/canoeing

- freshwater
- ocean

#### Hiking

- same day excursion on overnight trip
- hiking/backpacking in wilderness settings with overnight camping or lodging

#### White water rafting

#### Climbing<sup>5</sup>

- rock climbing
- mountain climbing/trekking

The primary focus is on Hikers, Climbers & Paddlers as a whole within the Regional or Long-Haul Canadian market. Where there are noteworthy differences between the subset of Hikers, Climbers & Paddlers who claim to have travelled within or to Alberta and Canadian Hikers, Climbers & Paddlers as a whole, commentary is provided.<sup>6</sup>

<sup>4</sup> Since fieldwork for the TAMS study was conducted between January and June 2006, the “past two years” likely refers to 2004 and 2005. It is important to note, however, that when asked to report travel activities over a two-year period, consumers are prone to imprecision by focussing on “salient trips” (most memorable, most expensive, etc.) and/or by “telescoping” the specified time period (extending the time frame over which trips are reported beyond the specified two years). In light of this potential imprecision, a liberal interpretation of the “reference period” is advised. Throughout this report, the terms “past two years or so” and “recent” are commonly used to describe the “past two year” recall period.

<sup>5</sup> Ice climbing is included as an activity in the TAMS study but is not reported as a *main reason* for a trip in the Statistics Canada data file. Hence, ice climbing can be reported *only* for “any participation” but not as a “main reason” for a trip in the Canadian analysis.

<sup>6</sup> See comments in footnote #4 on telescoping for a two-year recall period. Since the potential for imprecision increases as the recall period increases, readers are advised to interpret the “past ten years” liberally. See Footnote #3 for comments on labelling used in this report for travellers within and to Alberta.

- Since **Regional Canadian Hikers, Climbers & Paddlers** include Alberta residents and those in neighbouring provinces, it is not surprising that there is considerable overlap between the sector as a whole and the subset of this market that has travelled to or within Alberta over the past decade (82%). Because the two groups are largely the *same* tourists, there are minimal differences between them.
- In contrast, differences between **Long-Haul Canadian Hikers, Climbers & Paddlers** in total and those who have been to Alberta over the past decade are more prevalent because there is comparatively little overlap between these two groups (28%).

**Note to Readers**

Activities and locations visited are *independent* of one another.

In other words, Canadian Hikers, Climbers & Paddlers claim to have taken an overnight trip motivated by kayaking, canoeing, white water rafting, rock climbing, mountain climbing or trekking, or hiking in the past two years or so and to have taken overnight pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited. Thus, Hikers, Climbers & Paddlers may or may not have engaged in one or more of the outdoor activities that define the sector in a particular country, province or state they have visited recently for an overnight pleasure trip.

## **II. Executive Summary**

### **A. Overview of the Canadian Market for Hikers, Climbers & Paddlers in Alberta**

#### **CANADIAN HIKERS, CLIMBERS & PADDLERS OCCUR AT THE SAME RATE IN EASTERN AND WESTERN CANADA.**

Of course, the *number* of Canadian Hikers, Climbers & Paddlers in the Long-Haul segment is appreciably larger than is the case in the Regional segment because Canada's population is concentrated in the east. Of the 13.5 million Canadian adult pleasure travellers residing in the Long-Haul market (Ontario, Québec and Atlantic Canada), 1.6 million fall within the Hikers, Climbers & Paddlers sector (12%). At the Regional level, 687,000 of the 6.2 million Canadian adult pleasure travellers residing in British Columbia, Alberta, Saskatchewan and Manitoba are Hikers, Climbers & Paddlers (11%).

#### **TRAVELLERS TO ALBERTA ARE MUCH MORE PREVALENT AMONG WESTERN CANADIAN HIKERS, CLIMBERS & PADDLERS.**

Since Alberta's resident population is included in the Regional Canadian Hikers, Climbers & Paddlers market, it comes as no surprise that trips to or within this province are appreciably more common within the Regional Canadian market than is the case among those who live in Ontario and eastward. Of the 687,000 Regional Canadian Hikers, Climbers & Paddlers, 566,000 are travellers within or to Alberta (82%), whereas of the 1.6 million Long-Haul Canadian Hikers, Climbers & Paddlers, only 441,000 (28%) have been to Alberta over the past decade.

#### **OUTDOOR-ORIENTED TOURISTS IN EASTERN AND WESTERN CANADA HAVE SIMILAR DEMOGRAPHIC CHARACTERISTICS.**

Whether they reside in the eastern or western portion of the country, Canadian Hikers, Climbers & Paddlers look a lot like one another in terms of their ages, gender mix, household composition, education and income. They are evenly divided between men and women, are young or middle-aged Canadians, and live as couples or families with children. Both geographically-defined outdoor segments are somewhat more affluent and are more apt to be university-educated than are *typical* Canadian travellers.

**THEY SHARE SIMILAR OUTDOOR INTERESTS.**

Of the activities that define the sector, **hiking** is the most popular. **Kayaking or canoeing** is the second most popular in both parts of the country, but enjoys particular strength in eastern Canada (43%) compared to Hikers, Climbers & Paddlers in western Canada (25%). Conversely, **mountain climbing** attracts more tourists as the main reason for a trip in the Regional Canadian market (15%) than it does in the Long-Haul Canadian market (8%).

Additional outdoor activities that motivate pleasure trips among sizeable numbers of Hikers, Climbers & Paddlers from the Regional and Long-Haul Canadian markets include camping, visiting nature parks, sunbathing or sitting on a beach, and alpine skiing. Possibly because of the proximity of world-class ski slopes to western Canadian Hikers, Climbers & Paddlers, alpine skiing is more prevalent as a trip driver in this market (33%) than it is in eastern Canada (25%).

**CANADIAN HIKERS, CLIMBERS & PADDLERS FAVOUR OUTDOOR ACTIVITIES OVER CULTURAL, ENTERTAINMENT OR CULINARY ONES.**

Members of this market sector do not bring as much enthusiasm to most cultural and entertainment pursuits as they bring to outdoor activities. Few of the many cultural and entertainment options measured in the study attract even 1-in-5 Canadian Regional or Long-Haul Hikers, Climbers & Paddlers as trip *drivers*. Nonetheless, sizeable numbers of them visit well-known historic sites, stroll in cities to see architecture, go to movies or visit museums among the activities included on their overnight pleasure trips.

Similarly, Canadian Hikers, Climbers & Paddlers are unlikely to take trips *in order to* dine in restaurants, go to outdoor cafes, go wine tasting or shop. Nonetheless, most of them engage in these activities on their holidays.

**FOCUS ON THE RICHNESS OF ALBERTA'S OUTDOOR OFFERINGS.**

To attract Canadian Hikers, Climbers & Paddlers to travel more extensively within Alberta or take trips to the province, the emphasis should be on the variety of outdoor experiences they can have. This could include the opportunity to engage in new and different outdoor experiences or the same experiences with new and different vistas and terrains. Because they want their holidays to provide a break from the day-to-day and relaxation, promotional efforts should focus on how easy it is to hike, climb, or paddle in Alberta.

These tourists may also appreciate assurances that they can readily find camping facilities or mid-range to budget lodging and will have opportunities to shop and have fine dining experiences while on an outdoor-focussed trip.

#### **ELECTRONIC MEDIA HAVE THE WIDEST REACH.**

Visibility on websites is essential for Alberta to draw this market sector. For travel information and planning, Canadian Hikers, Climbers & Paddlers rely on websites, including dedicated travel planning sites such as *Expedia* or *Travelocity*, destination marketing organization (DMO), hotel or resort and airline sites. The farther away they are from Alberta, the more reliance they place on official travel guides and editorial coverage in newspapers as information sources.

Creating goodwill ambassadors from Regional and Long-Haul Canadian Hikers, Climbers & Paddlers who travel to Alberta is as necessary as promotional efforts online, in print or via travel agents because most of these tourists rely on *advice of friends/relatives* for travel information. Those providing Alberta's outdoor experiences need to ensure that this advice is favourable and plentiful by delivering on promises.

#### **REGIONAL AND LONG-HAUL CANADIAN HIKERS, CLIMBERS & PADDLERS HAVE MUCH IN COMMON, BUT ARE NOT IDENTICAL.**

As would be expected, a *regional* market differs from a *long-haul* one in terms of the competitive environment and in terms of the types of tourism products available within easy reach of the tourist. Such differences, similarities and other key findings for Regional and Long-Haul Canadian Hikers, Climbers & Paddlers for Alberta are described in separate summaries and chapters devoted to each segment of the Canadian market.

## **B. Regional Canadian Market for Hikers, Climbers & Paddlers in Alberta**

### **THERE IS A ROBUST MARKET FOR HIKING, CLIMBING AND PADDLING IN WESTERN CANADA.**

*Regional Canadian Hikers, Climbers & Paddlers* – those who took overnight trips in the past two years *in order to* kayak, canoe, go rafting, climb rocks or mountains, or hike as day excursions or overnight – represent approximately 687,000 Canadian adults who reside in British Columbia, Alberta, Saskatchewan and Manitoba, or about eleven percent of the regional pleasure travel market. Of these Regional Canadian Hikers, Climbers & Paddlers, 566,000 (82%) claim to have been to or travelled within Alberta over the past decade (*Travellers within/to Alberta*).

### **REGIONAL CANADIAN HIKERS, CLIMBERS & PADDLERS LIVE IN ALL FOUR WESTERN PROVINCES.**

They are distributed across British Columbia, Alberta, Saskatchewan and Manitoba in a manner that is very similar to the adult population and to the overnight pleasure travel market as a whole. Thus, almost 1-in-2 reside in British Columbia (47%), more than 1-in-3 live in Alberta (39%) and about 1-in-14 live in each of Saskatchewan (6%) and Manitoba (7%).

### **HIKING IS ESPECIALLY POPULAR.**

**Hiking** is the sector's most popular trip driver (70%), followed at a considerable distance by **kayaking/canoeing** (25%), and **climbing** (19%). **White water rafting** was the primary reason for a trip for about 1-in-8 Hikers, Climbers & Paddlers.

Hikers are about evenly divided between those taking day hikes on overnight trips (48%) and those taking overnight hikes in wilderness settings (42%). Climbers are three times as likely to have taken a trip for mountain climbing or trekking (15%) as they are to have been rock climbing (5%). Paddlers seem to prefer to kayak or canoe in *freshwater* (18%) rather than in *oceans* (9%).

**REGIONAL CANADIAN HIKERS, CLIMBERS & PADDLERS ARE YOUNG OR MIDDLE-AGED MEN AND WOMEN.**

Every age group is represented among Regional Canadian Hikers, Climbers & Paddlers, but the market is definitely skewed toward younger tourists. More than 4-in-10 of them are between 18 and 34 years. The same proportion is middle-aged (35 to 54 years), but only about 1-in-8 are 55 years of age or over. Men and women are about equally likely to be Regional Canadian Hikers, Climbers & Paddlers.

The age and gender profile of Regional Canadian sector members who have and have *not* travelled within or to Alberta in the past decade are generally comparable. There are, however, indications that young Regional Canadian Hikers, Climbers & Paddlers are over-represented among Non-Alberta Travellers. One-third of Non-Alberta Travellers in the sector are between the ages of 18 and 24 years.

**THEY HAVE MORE EDUCATION THAN THE GENERAL TRAVELLING PUBLIC.**

Regional Canadian Hikers, Climbers & Paddlers are more apt to have a university degree (41%) than is the travelling public as a whole (28%). Similar to regional pleasure tourists in general, half of Regional Canadian Hikers, Climbers & Paddlers have mid-level household incomes (49%, \$40,000 to \$99,999) and close to one-third are in the highest income bracket (30%).

Regional Canadian Hikers, Climbers & Paddlers who have travelled to or within Alberta over the past decade closely resemble the market as a whole in terms of demographic characteristics. In contrast, Regional Canadian Hikers, Climbers & Paddlers who have *not* been to Alberta over the past decade are noticeably less likely to be university educated (22%) or to have household incomes of at least \$100,000 (13%) than are those who have travelled within or to Alberta.

**REGIONAL CANADIAN HIKERS, CLIMBERS & PADDLERS TRAVEL IN CANADA, THE U.S. AND OTHER COUNTRIES.**

Almost all of these tourists have recently travelled within Canada, with three-fifths saying they took overnight pleasure trips over the past two years within or to Alberta (60%). Slightly more have recently travelled to destinations in British Columbia (77%). Ontario (28%) and Saskatchewan (24%) are also relatively popular Canadian destinations for these outdoors-oriented westerners. These estimates include residents of each western province travelling *within* their own province. One-third of Regional Canadian Hikers, Climbers & Paddlers have *only* travelled within Canada for their overnight pleasure holidays over the past two years.

Over half of them have recently been to the U.S., with two western states – Washington and California – enjoying the greatest popularity as destinations. Led by Mexico and Europe, other countries are visited by 2-in-5 Regional Canadian Hikers, Climbers & Paddlers.

#### **BRITISH COLUMBIA IS A FORMIDABLE COMPETITOR FOR REGIONAL CANADIAN SECTOR MEMBERS.**

Image, proximity, population, and product diversity all contribute to British Columbia's popularity as a pleasure travel destination among Regional Canadian Hikers, Climbers & Paddlers. According to a rating of 9.0 on a ten-point scale, these tourists are most enthusiastic about British Columbia as an *appealing destination* for pleasure travel. At 7.5, Alberta is rated about on par with Nova Scotia (7.6) and Newfoundland and Labrador (7.4), but trails Hawaii (7.8) and Prince Edward Island (7.7) for overall touristic appeal. Even among Travellers within/to Alberta, British Columbia's image as an *appealing destination* (9.1) surpasses Alberta's by a sizeable margin (7.9).

#### **A SAFE DESTINATION IS A PRIORITY.**

Most Regional Canadian Hikers, Climbers & Paddlers start planning a trip with a *destination* in mind, although about 3-in-10 begin with the activities they want to enjoy while on their trip and slightly fewer focus on the type of vacation experience they wish to have. The destination should be *safe*, have *many things for adults to see and do*, be *convenient to access by car* and pose *no health concerns*.

#### **HIKERS, CLIMBERS & PADDLERS ENGAGE IN A WIDE RANGE OF OUTDOOR ACTIVITIES ON THEIR TRAVELS.**

Camping, especially in public campgrounds, is very popular among Regional Canadian sector members, with about two-fifths taking pleasure trips *in order to camp* (43% *main*; 73% *any*). Other outdoor activities that attract at least three-fifths of the tourism market on an *any participation* basis include swimming in lakes, sunbathing or sitting on a beach and going to nature parks. About two-fifths view flora/fauna, visit well-known natural wonders, swim in oceans and/or go alpine skiing.

Alberta offers many of Regional Canadian Hikers, Climbers & Paddlers' favourite outdoor trip activities, leaving ample room to market the province's camping facilities, nature parks, and skiing opportunities to western Canadians seeking hiking, climbing, paddling or rafting experiences.

**HISTORIC SITES, ARCHITECTURE, MUSEUMS AND SPORTING EVENTS HAVE LIMITED APPEAL.**

Regional Canadian Hikers, Climbers & Paddlers tend to be outdoor-oriented. Although they are not *driven* to travel in order to have entertainment or cultural experiences, they *do* stroll around cities looking at architecture; visit well-known and other historic sites, buildings and monuments; attend fairs or festivals; go to the movies, general history museums, and/or spectator sporting events when on trips. These cultural and entertainment experiences are among the *one-of-many* activities that are likely to enrich Regional Canadian Hikers, Climbers & Paddlers' trips. As such, the availability of these cultural and entertainment attractions and events in Alberta might be mentioned in marketing materials directed to the sector.

**DINING AND SHOPPING ARE ALSO THINGS TO "SEE AND DO".**

In addition to cultural and entertainment-oriented activities, shopping, dining out at restaurants offering *local* cuisine and visiting local outdoor cafes are common trip experiences for Regional Canadian Hikers, Climbers & Paddlers. Thus, tourists might appreciate being informed of the availability of restaurants, outdoor cafes, and shopping options in the context of the "amenities" Alberta destinations have to offer. This market may also favourably respond to a ski, mountain or lakeside resort experience combined with a season-appropriate outdoor activity (e.g., skiing or climbing) since sizeable minorities of them have stayed in each of these resort types over the past two years.

**THE INTERNET IS "THE" TRIP PLANNING TOOL FOR THESE TOURISTS.**

Over three-quarters of Regional Canadian Hikers, Climbers & Paddlers use the internet for travel information. Of the many *other* sources of print or electronic information available to them, relatively few enjoy widespread use. At the same time, three-fifths of these tourists rely on their own past experience and/or anecdotal information provided by friends and relatives. Use of official travel guides or brochures from provincial, state or national organizations, visitor information centres or travel agents is characteristic of over one-third of Regional Canadian Hikers, Climbers & Paddlers.

**ALBERTA FACES AN IMAGE CHALLENGE IN THE REGIONAL CANADIAN MARKET.**

As noted previously, Alberta faces stiff competition from neighbouring British Columbia. While Regional Canadian Hikers, Climbers & Paddlers who have travelled within or to Alberta over the past decade rate the province more favourably (7.9) than those who have not done so (5.4), both groups rate British Columbia much more positively as an *appealing destination* (9.1 and 8.5, respectively).

Giving Alberta's outdoor experiences a *fresh face* may remind them of what is available *near-to-hand* and acquaint them with new facilities and experiences that have been developed since they last considered taking a hiking, climbing or paddling trip within their own province.

**THE VALUE OF THE CANADIAN DOLLAR MAY BECOME AN OBSTACLE FOR MARKET RETENTION OR GROWTH.**

The appreciation of the Canadian dollar against U.S. currency is likely to increase the attractiveness of U.S. destinations for Canadians. Over half of Regional Canadian Hikers, Climbers & Paddlers have travelled to the U.S. on an overnight pleasure trip in the past two years. In their search for *unique, new and different* activities, they may become even more inclined to look south of the border for hiking, climbing and/or paddling.

To counter the southern lure, focussing on the unique terrain and vistas Alberta can offer may be useful. Marketers and outfitters may also find that emphasis on the *stress-free, relaxing* experience offered by travel to *nearby destinations* versus border controls and delays associated with travel to the U.S. has some caché among Regional Canadian Hikers, Climbers & Paddlers.

### **C. Long-Haul Canadian Market for Hikers, Climbers & Paddlers in Alberta**

#### **MANY RESIDENTS OF EASTERN CANADA SEEK HIKING, CLIMBING AND PADDLING TOURISM EXPERIENCES.**

*Long-Haul Canadian Hikers, Climbers & Paddlers* – those who took overnight trips in the past two years *in order to* kayak, canoe, go rafting, climb rocks or mountains, or hike as day excursions or overnight – represent approximately 1.6 million Canadian adults who reside in Ontario, Québec or one of the Atlantic provinces, or about twelve percent of the long-haul Canadian pleasure travel market. Of these Long-Haul Canadian Hikers, Climbers & Paddlers, 441,000 (28%) claim to have been to Alberta over the past decade (*Travellers to Alberta*).

#### **LONG-HAUL CANADIAN HIKERS, CLIMBERS & PADDLERS LIVE IN ALL EASTERN PROVINCES.**

They are distributed across eastern Canadian provinces in a manner that is similar to the adult population and to the overnight pleasure travel market as a whole, although there are indications that these outdoor enthusiasts are somewhat more prevalent in Québec (37%) and less prevalent in Atlantic Canada (6%) than might be expected. Almost three-fifths of eastern Canada's Hikers, Climbers & Paddlers reside in Ontario (57%), on par with this province's share of the region's travelling public.

Compared to their contributions to the sector as a whole, Hikers, Climbers & Paddlers from eastern Canada who have been to Alberta over the past decade are over-represented in Ontario (67% versus 57% of the total market) and significantly under-represented among Québec residents (25% versus 37% of the total market).

#### **HIKING IS ESPECIALLY POPULAR.**

**Hiking** is the sector's most popular trip driver (67%), followed at a considerable distance by **kayaking/canoeing** (43%), **climbing** (11%) and **white water rafting** (8%).

Hikers in eastern Canada are more likely to be taking day hikes on overnight trips (46%) than to be going on overnight hikes in wilderness settings (38%). Climbers are almost three times as likely to have taken a trip for mountain climbing or trekking (8%) as they are to have been rock climbing (3%). Paddlers seem to prefer to kayak or canoe in *freshwater* (40%) rather than in *oceans* (6%).

Long-Haul Canadian Hikers, Climbers & Paddlers who have travelled in Alberta over the past decade closely resemble *all* tourists in the sector in terms of their motivation rates for hiking and paddling. In light of product availability, it is not surprising that Alberta-bound easterners are more apt to have taken trips in order to go *mountain climbing* (13%) than are members of the sector as a whole (8%).

#### **LONG-HAUL CANADIAN HIKERS, CLIMBERS & PADDLERS ARE YOUNG OR MIDDLE-AGED MEN AND WOMEN.**

Every age group is represented among Long-Haul Canadian Hikers, Climbers & Paddlers, but the market is definitely skewed toward younger tourists. Half of these outdoor adventurers are between 18 and 34 years (49%). Approximately two-fifths of them are middle-aged (35 to 54 years), but only about 1-in-7 are 55 years of age or over. Men are slightly more likely than women to be Long-Haul Canadian Hikers, Climbers & Paddlers.

The age, gender and household composition profile of Long-Haul Canadian Hikers, Climbers & Paddlers who have taken an overnight trip to Alberta in the past decade is very similar to the sector as a whole.

#### **THEY SPAN EDUCATION AND INCOME SPECTRUMS.**

One-fifth of Long-Haul Canadian Hikers, Climbers & Paddlers have a high school diploma or less formal education (21%) and twice this proportion have at least one university degree (43%). Most of these tourists have mid-level household incomes (\$40,000 to \$99,999), although approximately one-quarter are in the lowest income bracket (24%) and the same proportion are in the highest bracket (26%).

Long-Haul Canadian Hikers, Climbers & Paddlers who have travelled in Alberta over the past decade are especially likely to be university-educated (52%) and to have incomes of at least \$100,000 (39%).

#### **LONG-HAUL CANADIAN HIKERS, CLIMBERS & PADDLERS TRAVEL IN CANADA, THE U.S. AND OTHER COUNTRIES.**

Almost all of these tourists have recently travelled within Canada, with about one-tenth saying they took overnight pleasure trips over the past two years to Alberta (11%). Even when *intra-provincial* tourists are excluded, Ontario (16%) and Québec (20%) attract more of the Long-Haul Canadian market than does Alberta.

Atlantic Canada is also popular as a destination among Long-Haul Canadian Hikers, Climbers & Paddlers (14%, excluding residents). Like Alberta at eleven percent, British Columbia attracts comparatively few Long-Haul Canadian Hikers, Climbers & Paddlers (12%). Manitoba and Saskatchewan are even less successful in attracting these eastern Canadians (4%, each).

Almost half of them have recently been to the U.S., with the near-border state of New York and the nearest major sun/sea state, Florida, enjoying the greatest popularity as destinations. Led by Europe and the Caribbean, other countries are visited by 2-in-5 Long-Haul Canadian Hikers, Climbers & Paddlers.

### **BRITISH COLUMBIA IS A FORMIDABLE COMPETITOR FOR SECTOR MEMBERS.**

Long-Haul Canadian Hikers, Climbers & Paddlers are most enthusiastic about British Columbia as an *appealing destination* for pleasure travel, according to this province an average rating of 8.8 on a ten-point scale. On the same scale, Alberta is rated at only 7.2. Other destinations deemed *more* appealing than Alberta by Long-Haul Canadian Hikers, Climbers & Paddlers include Hawaii (8.1) and Québec (7.9).

Alberta's rating increases substantively among Travellers to Alberta, suggesting that direct experience in the province overcomes preconceptions about it. At a rating of 8.2 within this subset of Long-Haul Canadian Hikers, Climbers & Paddlers, Alberta trails British Columbia (9.2), is at parity with Hawaii (8.1) and is ahead of every other province, territory or state covered in the study for its overall touristic appeal.

### **A SAFE DESTINATION IS A PRIORITY.**

Most Long-Haul Canadian Hikers, Climbers & Paddlers start planning a trip with a *destination* in mind although about one-third start their planning with the activities they want to enjoy while on their trip and one-quarter focus on the type of vacation experience they wish to have. The destination should be *safe*, have *many things for adults to see and do*, be *convenient to access by car* and pose *no health concerns*.

## **LONG-HAUL CANADIAN HIKERS, CLIMBERS & PADDLERS ENGAGE IN A WIDE RANGE OF OUTDOOR ACTIVITIES ON THEIR TRAVELS.**

Camping, especially in public campgrounds, is very popular among Long-Haul Canadian sector members, with two-fifths taking pleasure trips *in order to* camp (40% *main*; 66% *any*). Other outdoor activities that attract at least half of the tourism market on an *any participation (any)* basis include swimming in lakes, sunbathing or sitting on a beach, and going to nature parks. Other popular activities include viewing flora/fauna, visiting well-known natural wonders, swimming in oceans, going alpine skiing, fishing and recreational cycling.

Alberta offers many of Long-Haul Canadian Hikers, Climbers & Paddlers' favourite outdoor trip activities, leaving ample room to market the province's camping facilities, nature parks, skiing and cycling opportunities to eastern Canadians who are seeking hiking, climbing, paddling or rafting experiences.

## **HISTORIC SITES, ARCHITECTURE, MUSEUMS AND SPORTING EVENTS HAVE LIMITED APPEAL.**

Even though cultural and entertainment activities are not necessarily strong motivators for pleasure travel by Long-Haul Canadian Hikers, Climbers & Paddlers, more than half of these tourists stroll around cities to see architecture and about two-fifths go to museums, well-known historic sites and/or cinemas as one-of-many activities (*any*) on their trips. Approximately one-third include visits to other historic sites, buildings or monuments; general history museums; arts performances, art galleries and/or spectator sporting events among the activities in which they participate while travelling (*any*).

Travellers to Alberta within the Long-Haul Canadian Hikers, Climbers & Paddlers sector are more apt to participate (*any*) in a variety of cultural and entertainment activities than are sector members as a whole. To continue to attract these eastern Canadians to Alberta, marketing materials focussed on hiking, paddling or climbing in Alberta might also include information on their favoured entertainment attractions and events.

## **DINING AND SHOPPING ARE ALSO THINGS TO "SEE AND DO".**

In addition to cultural and entertainment-oriented activities, shopping, dining out at restaurants offering *local* cuisine and visiting local outdoor cafes are common trip experiences for Long-Haul Canadian Hikers, Climbers & Paddlers. Thus, tourists might appreciate being informed of the availability of restaurants, outdoor cafes, and shopping options in the context of the "amenities" Alberta destinations have to offer. This market may also favourably respond to a ski, mountain or lakeside resort experience combined with a season-appropriate

outdoor activity (e.g., skiing or climbing) since sizeable minorities of them have stayed in each of these resort types over the past two years.

### **THE INTERNET IS AN ESSENTIAL SOURCE OF TRIP PLANNING INFORMATION.**

Over three-quarters of Long-Haul Canadian Hikers, Climbers & Paddlers use the internet for travel information. Of the many *other* sources of print or electronic information available to them, relatively few enjoy widespread use. At the same time, close to three-fifths of these tourists rely on their own past experience and/or anecdotal information provided by friends and relatives.

Use of official travel guides or brochures from provincial, state or national organizations, maps and/or newspapers is characteristic of two-fifths of Long-Haul Canadian Hikers, Climbers & Paddlers. About one-third use visitor information centres and/or travel agents as trip-planning tools. Reliance on these sources of information is especially common among sector members who have travelled to Alberta in the past decade.

### **ALBERTA FACES AN IMAGE CHALLENGE IN THE LONG-HAUL CANADIAN MARKET.**

As noted previously, Alberta faces stiff competition from neighbouring British Columbia. While Long-Haul Canadian Hikers, Climbers & Paddlers who have travelled within Alberta over the past decade rate the province more favourably (8.2) than those who have not done so (6.7), both groups rate British Columbia much more positively as an *appealing destination* (9.2 and 8.6, respectively).

Alberta could capitalize on British Columbia's image strength among Long-Haul Canadian Hikers, Climbers & Paddlers by creating outdoor adventures that include activities in *both* provinces.

### **FOCUS ON OUTDOOR VISTAS AND EXPERIENCES NOT WIDELY AVAILABLE IN EASTERN CANADA.**

For example, eastern Canada offers many opportunities for these outdoor-oriented tourists to camp, hike, kayak, canoe, fish, swim in lakes, and so on. What eastern Canada does not provide to any great extent are opportunities to climb mountains, ski on world-class downhill runs, encounter mountain sheep or elk, or to view the Canadian Badlands.

Promotion of the outdoor vistas and activities that are either *unique* or more *intense* in Alberta than these Long-Haul Canadian Hikers, Climbers & Paddlers

can find in Ontario, Québec or the Atlantic provinces might entice more of them to visit Alberta.

**THE VALUE OF THE CANADIAN DOLLAR MAY INCREASE CHALLENGES FOR RETENTION OR GROWTH OF THE MARKET FOR ALBERTA.**

The appreciation of the Canadian dollar against U.S. currency is likely to increase the attractiveness of U.S. destinations for all types of pursuits by Canadians. Close to half of Long-Haul Canadian Hikers, Climbers & Paddlers have travelled to the U.S. on an overnight pleasure trip in the past two years. In their search for *unique, new, different* activities, they may become even more inclined to look south of the border, both to take advantage of the longer hiking, climbing and paddling seasons available in parts of the U.S. and to realize the benefits of the favourable exchange rate.

To counter the southern lure, Alberta may find that emphasis on the *stress-free, relaxing* experience offered by travel within Canada and avoiding border controls and delays associated with travel to the U.S. have some caché among Long-Haul Canadian Hikers, Climbers & Paddlers.

The Québec market should be a fertile one for Alberta's hiking, climbing and paddling products because these outdoor enthusiasts are over-represented in that province, but Alberta is relatively unsuccessful in attracting them. Perhaps Francophone Quebeckers require assurances that they can gather information about Alberta and obtain basic tourist services such as lodging and food services within the province *in French*.

### III. Regional Canadian Hikers, Climbers & Paddlers - Detailed Findings

#### A. Setting the Stage – Regional Canadian Travellers to Alberta

##### 1. Market Size – All Sectors

Tourism businesses in Alberta are competing for the attention of about 6.2 million Canadian adults who reside in provinces to the west of the Ontario-Manitoba border and claim to have taken at least one overnight pleasure or vacation trip over a two-year period (see Table 1). They represent the vast majority (84%) of the 7.3 million adults who live in British Columbia, Alberta, Saskatchewan and Manitoba.

Including residents of Alberta, almost 3-in-4 Canadians in the Regional overnight pleasure travel market, or about 4.5 million tourists, have had *some* experience with Alberta destinations over the past decade. They may have been on a vacation, visiting friends and relatives or on a business trip to the province. Three-fifths of the potential Regional Canadian market claim to have travelled in Alberta in the past two years or so (3.7 million). Most of these recent tourists were on a pleasure or vacation trip (three million).

TABLE 1: OVERVIEW OF MARKET SIZE	Regional Canadian Market (British Columbia, Alberta, Saskatchewan, Manitoba)	
Unweighted base	(11,879)	
Total Adult Population*	7,341,000	
Pleasure Travellers Any Destination – Past 2 Years	6,197,000	
<b><u>Took Overnight Trips to Alberta</u></b>	#	%
Any purpose, past 10 years	4,546,000	73%
Any purpose, past 2 years	3,702,000	60%
Pleasure, past 2 years	3,041,000	49%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 1. Note: these figures include Alberta residents travelling within their own province. \*Adults are residents 18 years of age or over.

## 2. Market Size – Hikers, Climbers & Paddlers

People who take a trip *in order to* go hike, climb or paddle are only a fraction of tourists who engage in these types of outdoor activities while on their vacations. In fact, almost 2.3 million Canadians in the Regional Canadian market say they have participated in one of these outdoor activities on at least one of their trips over a two-year period (37%) (see Table 2).

Of these pleasure tourists, 687,000 claim that they took a trip *in order to* kayak, canoe, go rafting, climb rocks or mountains, or take day or overnight wilderness hikes. Thus, the Regional Canadian market for Hikers, Climbers & Paddlers represents about one-tenth of the travelling public in the four western provinces (11%). Regional Canadian Hikers, Climbers & Paddlers who have taken an overnight trip within or to Alberta over the past decade (*Travellers within/to Alberta*) represent approximately 566,000 western Canadians, or just under one-tenth of the regional overnight pleasure travel market as a whole. These Travellers within/to Alberta constitute four-fifths of the total Regional Canadian Hikers, Climbers & Paddlers market (82% of 687,000 Regional Canadian Hikers, Climbers & Paddlers).

Hiking, climbing and paddling enthusiasts – those for whom one of these vigorous outdoor activities is the main reason for a trip – are the focus of this report because, as the “dedicated” or “passionate” market, they represent a crystallization of the interests and characteristics that might attract more casual participants to these types of activities.

TABLE 2: OVERVIEW OF HIKERS, CLIMBERS & PADDLERS	Regional Canadian Pleasure Travellers Any Destination – Past 2 Years	
Unweighted base	(9,089)	
Weighted, Projected	6,197,000	
<b><u>Engaged in Hiking, Climbing, Paddling on Trips</u></b>		
Any	2,276,000	37%
Main Reason for Trip	687,000	11%
Took overnight trip within/to Alberta - any purpose, past 10 years	566,000	9%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 3. Note: these figures include Alberta residents travelling within their own province.

## **B. Market Profile: Regional Canadian Hikers, Climbers & Paddlers**

### **1. Market Segments**

The Regional Canadian Hikers, Climbers & Paddlers sector is composed of pleasure tourists who indicated that at least one of the following activities was the main reason for a recent trip:

#### **Hiking**

Day hikes on overnight trips

Hiking/backpacking in wilderness settings with overnight camping or lodging

#### **Climbing**

Rock climbing

Mountain climbing/trekking

#### **Kayaking/canoeing**

Freshwater

Ocean

#### **White water rafting**

Hiking is the sector's most popular trip driver (70%), followed at a considerable distance by kayaking/canoeing (25%), and climbing (19%). White water rafting was the primary reason for trip for about 1-in-8 Hikers, Climbers & Paddlers (see Table 3).

- About as many Regional Canadian Hikers in the sector have taken overnight pleasure trips in the past two years primarily to take day hikes (48%) as have taken overnight hikes in wilderness settings (42%).
- Climbers are three times as likely to have taken a trip for mountain climbing or trekking (15%) as they are to have been seeking a rock climbing experience (5%).
- Paddlers seem to prefer to kayak or canoe in *freshwater* (18%) rather than in *oceans* (9%).

TABLE 3: HIKING, CLIMBING & PADDLING AS MAIN REASONS FOR OVERNIGHT TRIPS	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b>Hiking</b>	<b>70%</b>	<b>71%</b>	<b>67%</b>
Day hikes on overnight trips	48%	50%	39%
Hiking/backpacking in wilderness settings with overnight camping or lodging	42%	40%	50%
<b>Climbing</b>	<b>19%</b>	<b>19%</b>	<b>16%</b>
Rock climbing	5%	4%	7%
Mountain climbing/trekking	15%	16%	9%
<b>Kayaking/canoeing</b>	<b>25%</b>	<b>25%</b>	<b>27%</b>
Freshwater	18%	20%	12%
Ocean	9%	7%	19%
<b>White water rafting</b>	<b>13%</b>	<b>14%</b>	<b>6%</b>

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 2. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade. Figures add to more than 100% because of duplication.

## 2. Geographic and Demographic Characteristics

### a) Place of Residence

Regional Canadian Hikers, Climbers & Paddlers live in all four western provinces and are distributed across them in a manner that is similar to the adult population and to the overnight pleasure travel market as a whole (see Table 4). Thus, almost 5-in-10 reside in British Columbia (47%) and about 4-in-10 live in Alberta (39%). Less than 1-in-10 are residents of Saskatchewan (6%) or Manitoba (7%), suggesting that sector members are slightly under-represented in these two Prairie provinces.<sup>7</sup>

Each major metropolitan area in the four provinces contributes Regional Canadian Hikers, Climbers & Paddlers at a rate consistent with the city's share of the region's population. The largest city, Vancouver, is home to one-quarter of the Regional Canadian market (25%), followed by Edmonton and Calgary at approximately one-seventh each; and Winnipeg and Victoria at about one-twentieth each.

Regional Canadian Travellers within/to Alberta closely parallel *all* Regional Canadian Hikers, Climbers & Paddlers in terms of their place of residence.

TABLE 4: PLACE OF RESIDENCE	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b>British Columbia</b>	<b>47%</b>	<b>43%</b>	<b>69%</b>
Vancouver	25%	22%	39%
Victoria	6%	5%	12%
<b>Alberta</b>	<b>39%</b>	<b>43%</b>	<b>24%</b>
Calgary	15%	15%	17%
Edmonton	14%	17%	2%
<b>Saskatchewan</b>	<b>6%</b>	<b>7%</b>	<b>1%</b>
Regina	2%	2%	1%
Saskatoon	2%	3%	1%
<b>Manitoba</b>	<b>7%</b>	<b>8%</b>	<b>6%</b>
Winnipeg	5%	5%	3%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 42. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

<sup>7</sup>See Detailed Tables, Volume 1, Table 42 for the distribution of the Canadian adult and pleasure travel markets by province/region.

## **b) Personal and Household Characteristics**

### **Age, Gender, Household Composition**

Every age group is represented among Regional Canadian Hikers, Climbers & Paddlers, but the market is definitely skewed toward younger tourists (see Table 5). More than 4-in-10 of them are between 18 and 34 years. The same proportion is middle-aged (35 to 54 years), but only about 1-in-8 are 55 years of age or over. Men and women are about equally likely to be Regional Canadian Hikers, Climbers & Paddlers.

These tourists live in households comprised of two adults (couples, 35%), in families with children under 18 years of age (24%) or, less commonly, alone (11%).

The age, gender and household composition profile of Regional Canadian Hikers, Climbers & Paddlers who have taken an overnight trip to or within Alberta in the past decade is very similar to the sector as a whole. There are, however, indications that young Regional Canadian Hikers, Climbers & Paddlers are over-represented among Non-Alberta Travellers. One-third of Non-Alberta Travellers in the sector are between the ages of 18 and 24 years.

TABLE 5: AGE, GENDER, HOUSEHOLD COMPOSITION

	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b>Age</b>			
18 – 24 Years	21%	19%	34%
25 – 34 Years	22%	22%	21%
35 – 44 Years	20%	22%	11%
45 – 54 Years	24%	24%	25%
55 – 64 Years	8%	9%	5%
65+ Years	5%	5%	5%
<b>Gender</b>			
Men	51%	51%	49%
Women	49%	49%	51%
<b>Household Composition</b>			
Lives alone	11%	11%	13%
Couples – no children	35%	36%	33%
Families – children under 18 years	24%	24%	23%
Families – all children 18+	7%	8%	2%
All other/not stated	23%	22%	30%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 40 and 41. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

### **Country of Birth, Education, Occupation, and Income**

Most Regional Canadian Hikers, Climbers & Paddlers, like *all* tourists who live in British Columbia, Alberta, Saskatchewan and Manitoba were born in Canada (see Table 6). Nonetheless, they have a somewhat different socio-economic profile than do regional pleasure tourists as a whole.

- Those in the Hikers, Climbers & Paddlers segment are more apt to have a university degree (41%) than is the travelling public as a whole (28%).<sup>8</sup>
- The sizeable proportion of young and middle-aged westerners in the sector contributes to a lower level of retirees among Regional Canadian Hikers, Climbers & Paddlers (6%) than is the case for regional tourists in general (17%).

Similar to regional pleasure tourists in general, half of Regional Canadian Hikers, Climbers & Paddlers have mid-level household incomes (49%, \$40,000 to \$99,999) and close to one-third are in the highest income bracket (30%).

Regional Canadian Hikers, Climbers & Paddlers who have travelled within or to Alberta over the past decade closely resemble the market as a whole in terms of place of birth, education, labour force participation and household income. In contrast, Regional Canadian Hikers, Climbers & Paddlers who have *not* been to Alberta over the past decade are noticeably less likely to be university educated (22%) or to have household incomes of at least \$100,000 (13%) than are those who have travelled within or to Alberta.

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<sup>8</sup> See Detailed Tables, Volume 1, Tables 33 through 39 for figures.

TABLE 6: COUNTRY OF BIRTH, EDUCATION, LABOUR FORCE PARTICIPATION, INCOME	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b>Country of Birth</b>			
Canada	80%	81%	77%
Other	20%	19%	23%
<b>Education</b>			
High school diploma or less	26%	24%	35%
Some post-secondary	12%	10%	23%
Post-secondary diploma or certificate	21%	21%	21%
University degree+	41%	45%	22%
<b>Labour Force Participant<sup>1</sup></b>			
Retirees	6%	6%	6%
<b>Household Income</b>			
Under \$40,000	22%	18%	38%
\$40,000 - \$59,999	15%	15%	13%
\$60,000 - \$99,999	34%	34%	36%
\$100,000+	30%	34%	13%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 36 through 39. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade. <sup>1</sup> "Labour force participant" includes working full-time, part-time and self-employed.

### 3. Competitive Destinations

#### a) Worldwide Destinations for Overnight Pleasure Trips

When asked to identify the destinations of the overnight pleasure trips they took over a two-year period, almost all Regional Canadian Hikers, Climbers & Paddlers indicated that they have taken recent vacations within Canada and one-third claim to have travelled *only* within Canada (34%) (see Table 7). Destinations for overnight pleasure trips in the past two years among these outdoor-oriented tourists as a whole and those who have taken an overnight trip to or within Alberta in the past decade are very similar. Specifically, about half have travelled in the U.S. and two-fifths have been to other foreign countries on a recent pleasure trip. Of these other countries or regions, Mexico and Europe are the most popular.

Regional Canadian Hikers, Climbers & Paddlers who have *not* travelled to or within Alberta are, however, more likely than are Travellers within/to Alberta to have taken trips *only* within Canada (52% versus 30%).

#### Note to Readers

Activities and locations visited are *independent* of one another.

In other words, Canadian Hikers, Climbers & Paddlers claim to have taken an overnight trip motivated by kayaking, canoeing, white water rafting, rock climbing, mountain climbing or trekking, or hiking in the past two years or so and to have taken overnight pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited. Thus, Hikers, Climbers & Paddlers may or may not have engaged in one or more of the outdoor activities that define the sector in a particular country, province or state they have visited recently for an overnight pleasure trip.

	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b>Canada</b>	<b>97%</b>	<b>97%</b>	<b>99%</b>
Canada only	34%	30%	52%
<b>U.S.</b>	<b>52%</b>	<b>56%</b>	<b>33%</b>
<b>Other Countries (NET)</b>	<b>41%</b>	<b>43%</b>	<b>31%</b>
Mexico	18%	20%	8%
Europe	15%	16%	12%
Caribbean	10%	11%	6%
Asia	8%	8%	9%
Africa/ Australia/New Zealand	5%	4%	8%
South/Central America	5%	6%	2%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 47. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## b) Canadian Destinations

Four-fifths of Regional Canadian Hikers, Climbers & Paddlers have had some travel experience in Alberta over a ten-year period (82%) and three-fifths (60%) have been to the province on an overnight pleasure trip in the past two years (see Table 8).

Not surprisingly, recent overnight pleasure travel experiences in Alberta are appreciably more common among those who have been to the province over the past decade (72%) than is the case for the sector as a whole (60%). British Columbia (77%) is more popular than is Alberta for Regional Canadian Hikers, Climbers & Paddlers (60%). Even when the respective residents travelling within Alberta and British Columbia are removed, British Columbia remains more successful than Alberta in attracting *others* from the region (Alberta, 29%; British Columbia, 35%). Ontario (28%) is also a comparatively popular Canadian destination for Regional Canadian Hikers, Climbers & Paddlers.

TABLE 8: CANADIAN DESTINATIONS	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b>Alberta</b>			
Any purpose, past 10 years	82%	100%	-
Any purpose, past 2 years	72%	87%	-
Pleasure, past 2 years	<b>60%</b>	<b>72%</b>	-
Excluding Alberta Residents	29%	35%	-
<b>Overnight Pleasure Trips in Past 2 Years to . . .</b>			
Atlantic Canada	10%	9%	13%
Québec	10%	12%	4%
Ontario	28%	28%	24%
Manitoba	16%	18%	7%
Excluding Manitoba Residents	10%	12%	1%
Saskatchewan	24%	27%	6%
Excluding Saskatchewan Residents	18%	21%	6%
British Columbia	77%	75%	84%
Excluding British Columbia Residents	35%	38%	19%
Yukon	4%	5%	1%
Northwest Territories	1%	1%	1%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 47 and 48. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

#### 4. U.S. Pleasure Travel Destinations

American states competing with Alberta for the Regional Canadian Hikers, Climbers & Paddlers represent a mix of those at or near the region's border and sun/sea destinations (see Table 9). Of the border states, Washington is most apt to draw Regional Canadian Hikers, Climbers & Paddlers (20%), likely because of the high proportion of these tourists who live directly across the border in British Columbia. Oregon draws about one-tenth of this sector for overnight pleasure trips (9%).

Of the sun/sea states, California is the most popular (18%), followed at some distance by Nevada, Arizona and Florida.

TABLE 9: U.S. DESTINATIONS*	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
Washington	20%	21%	14%
California	18%	20%	11%
Oregon	9%	10%	3%
Nevada	8%	9%	3%
Arizona	7%	8%	1%
Florida	7%	7%	6%
Montana	6%	8%	**
New York State	6%	7%	1%
Idaho	5%	5%	2%
Hawaii	5%	5%	3%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 47. \*Total includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. \*Travellers within/to Alberta are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. \*Non-Alberta Travellers are sector members with no trips to Alberta reported over the past decade. \*States displayed represent destinations visited by at least 5% of sector members. \*\*Less than 0.5%.

## 5. Destinations: Roles & Ratings

### a) Importance of Destination

Three-fifths of Regional Canadian Hikers, Climbers & Paddlers claim that **destination** is their first consideration in planning a recent summer and/or winter trip (see Table 10). At the same time, 3-in-10 start their trip planning process with a focus on the **activities** they want to enjoy while on their trip and somewhat fewer begin with the **type of vacation experience** they wish to have.

Western Canada's Hikers, Climbers & Paddlers also put a premium on **destination choice** *per se*, with over 6-in-10 claiming that it is *extremely* or *very important* to them. A similar level of importance is accorded destination *per se* by the subset of these tourists with visits within or to Alberta over the past decade.

	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b>First Consideration for Most Recent Summer/Winter Trip (NET)*</b>			
Start with destination	60%	63%	43%
Start with type of vacation experience	25%	25%	28%
Start with activities	29%	30%	26%
Look for package deal	4%	2%	13%
Other/not stated	15%	15%	11%
<b>Importance of Destination</b>			
Extremely/Very Important (SUM)	64%	63%	73%
Extremely important	25%	23%	33%
Very important	40%	40%	41%
Average**	3.8	3.8	4.0

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 24 and 26. Percentages for "first consideration" do not add to 100% because not all response categories are shown and/or because multiple responses were permitted. \*Based on respondents who reported taking a summer and/or winter overnight pleasure trip in past two years. \*\*Average based on assigned values of 5 for "extremely important" to 1 for "not at all important". Averages are calculated only on those volunteering an opinion. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## b) Importance of Conditions in Destination Choice

Overnight pleasure travellers were asked to rate a variety of “conditions” in terms of their importance in making a destination choice. A three-point semantic scale was used.<sup>9</sup>

Regional Canadian Hikers, Climbers & Paddlers and Travellers within/to Alberta within the sector resemble overnight pleasure travellers as a whole in terms of the conditions they are most apt to accord *high importance* when selecting a destination. Like other regional tourists, members of this sector put *feeling safe* (53%) at the top of their list (see Table 11). Over two-fifths of them seek a destination with *many things for adults to see and do* (42%). Somewhat fewer want their destinations to be easily *accessible by car*<sup>10</sup> (38%) and to pose *no health concerns* (36%).

The rank-order of the considerations most likely to be deemed *highly important* is the same for Regional Canadian Hikers, Climbers & Paddlers and for the pleasure travel market as a whole, but health and safety concerns are particularly prominent among *generic* regional tourists. In light of the inherent risks associated with activities such as white water rafting, wilderness hiking, mountain and rock climbing, it is not surprising to find safety and health considerations downplayed among Regional sector members.

### Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 Regional Canadian Hikers, Climbers & Paddlers

	Regional Canadian Hikers, Climbers & Paddlers		All Regional Canadian <u>Pleasure Tourists</u>
	Total	Travellers within/to Alberta	
Feeling safe	53%	52%	68%
Lots for adults to see/do	42%	41%	41%
Convenient access by car (to destination)	38%	40%	40%
No health concerns	36%	35%	48%

Close to one-third seek destinations offering *budget lodging* or *camping*, and about one-quarter say that they select a destination based on the availability of *mid-range lodging, information on the internet* and/or *direct air access* to the destination.

<sup>9</sup> “Highly important”, “Somewhat important”, and “Of no importance”.

<sup>10</sup> The question wording suggests that variables related to transportation are associated with getting to the destination: *How important are each of the following conditions when choosing a destination for an out-of-town pleasure or vacation trip of one or more nights?*

There are no substantive differences between Regional Canadian Hikers, Climbers & Paddlers as a whole, those who have travelled within or to Alberta over the past decade or those who have not in terms of the conditions they deem highly important in their destination choices.

TABLE 11: CONDITIONS FOR SELECTING A DESTINATION	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
Feeling safe	53%	52%	58%
Lots for adults to see/do	42%	41%	47%
Convenient access by car (to destination)	38%	40%	31%
No health concerns	36%	35%	42%
Budget accommodation	32%	30%	41%
Camping	29%	28%	31%
Mid-range accommodation	26%	26%	26%
Information available on internet	26%	25%	34%
Direct access by air (to destination)	24%	24%	25%
Low cost packages available	19%	18%	21%
Very different culture than own	13%	11%	21%
Lots for children to see/do	12%	12%	13%
Convenient access by train/bus (to destination)	10%	9%	12%
Have friends or relatives there	7%	5%	15%
Great shopping	7%	5%	18%
Familiar with culture & language	7%	5%	16%
Luxury accommodation	3%	3%	1%
Disabled-person-friendly	3%	3%	2%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 27. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

### c) Appeal of Various Destinations

According to 7.5 on a ten-point scale, Regional Canadian Hikers, Climbers & Paddlers rate Alberta about on par with Prince Edward Island, Nova Scotia, Newfoundland and Labrador as an *appealing destination* (see Table 12).<sup>11</sup> The province is, however, rated substantively lower than its neighbouring British Columbia (9.0) and Hawaii (7.8).<sup>12</sup>

Within the Regional outdoor-oriented sector with travel experience within or to Alberta over the past decade, Alberta is rated more positively (7.9) than it is among Regional Canadian Hikers, Climbers & Paddlers as a whole (7.5). Even among those with direct Alberta experiences, however, British Columbia is more favourably regarded (9.1). Sector members who have not been to Alberta in the past decade have a particularly low impression of the province as an appealing tourism destination (5.4).

#### Summary: Highest Appeal Destinations among Regional Canadian Hikers, Climbers & Paddlers

	Regional Canadian Hikers, Climbers & Paddlers		All Regional Canadian Pleasure Tourists
	<u>Total</u>	<u>Travellers within/to Alberta</u>	
British Columbia	9.0	9.1	8.9
Hawaii	7.8	7.9	8.1
Prince Edward Island	7.7	7.7	7.2
Nova Scotia	7.6	7.7	7.1
<b>Alberta</b>	<b>7.5</b>	<b>7.9</b>	<b>7.4</b>

<sup>11</sup> Two image questions associated with specific destinations were included in the TAMS study. One of these asked travellers to use a ten-point bi-polar rating scale ranging from *very appealing* (10) to *very unappealing* (1) to assess each destination's appeal for a pleasure trip. The second question associated with reasons to travel to a destination is discussed in the following chapter (B.5.d).

<sup>12</sup> A spread of more than three tenths (0.3) between one destination and another is required to constitute a "real" difference in average ratings.

TABLE 12: APPEAL OF VARIOUS DESTINATIONS\*

	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b>Alberta</b>	<b>7.5</b>	<b>7.9</b>	<b>5.4</b>
Newfoundland & Labrador	7.4	7.4	7.2
Nova Scotia	7.6	7.7	7.3
New Brunswick	6.8	6.9	6.5
Prince Edward Island	7.7	7.7	7.3
Québec	6.9	6.9	6.7
Ontario	6.4	6.4	6.9
Manitoba	5.0	5.1	4.6
Saskatchewan	4.9	5.0	4.1
British Columbia	9.0	9.1	8.5
Yukon	7.2	7.3	6.9
Northwest Territories	6.6	6.6	6.7
Nunavut	5.9	5.9	6.1
<b>U.S. STATES</b>			
New York State	6.2	6.1	6.3
Colorado	6.3	6.3	6.2
Florida	6.1	6.2	5.8
California	7.2	7.1	7.6
Hawaii	7.8	7.9	7.5
Arizona	6.1	6.2	5.7

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 28. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade. "Averages are average ratings calculated using a ten-point bi-polar rating scale ranging from very appealing (10) to very unappealing (1). Averages are calculated on those volunteering a rating only.

#### d) Number of Good Reasons to Visit Various Destinations

Not too surprisingly, the same destinations accorded high appeal ratings are the ones that emerge at the top of Regional Canadian Hikers, Climbers & Paddlers' lists for having *many good reasons* to visit on a pleasure trip (see Table 13).<sup>13</sup> Specifically, British Columbia tops the list with almost 9-in-10 stating that there are many good reasons to go to this province. About half of these tourists state that there are *many good reasons* to travel in Alberta (53%), putting this province at about parity with Hawaii and California, and well ahead of all other destinations rated.

Experience with Alberta's tourism infrastructure has a positive impact on Regional Canadian Hikers, Climbers & Paddlers' perceptions of the province. Appreciably more Regional Canadian sector members who have travelled within or to the province over the past decade claim that there are *many good reasons* to visit (60%) than is the case among those who have not been to Alberta (23%).

At the same time, members of the *Regional Canadian Hikers, Climbers & Paddlers market* are somewhat more favourably disposed to Alberta (53%) than are *all regional pleasure tourists* (48%).

#### Summary: Highest Rated Destinations among Regional Canadian Hikers, Climbers & Paddlers

	Regional Canadian Hikers, Climbers & Paddlers		All Regional Canadian Pleasure Tourists
	Total	Travellers within/to Alberta	
British Columbia	87%	88%	80%
Hawaii	56%	56%	56%
California	48%	46%	48%
<b>Alberta</b>	<b>53%</b>	<b>60%</b>	<b>48%</b>

<sup>13</sup> Consumers were asked to indicate which of three statements best described their feelings about taking a pleasure trip to the same destinations for which they rated *appeal* (see previous section). The statements were *there are NO good reasons to travel to this destination*, *SOME good reasons . . .* and *MANY good reasons to travel to this destination*.

TABLE 13: NUMBER OF REASONS TO VISIT VARIOUS DESTINATIONS

	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<i>% stating MANY good reasons to visit destination</i>			
<b>Alberta</b>	<b>53%</b>	<b>60%</b>	<b>23%</b>
Newfoundland & Labrador	39%	42%	27%
Nova Scotia	42%	44%	32%
New Brunswick	28%	30%	20%
Prince Edward Island	40%	42%	30%
Québec	41%	42%	38%
Ontario	29%	29%	30%
Manitoba	12%	12%	13%
Saskatchewan	13%	13%	10%
British Columbia	87%	88%	81%
Yukon	38%	39%	30%
Northwest Territories	26%	27%	25%
Nunavut	18%	18%	16%
<b>U.S. STATES</b>			
New York State	29%	28%	37%
Colorado	19%	20%	17%
Florida	30%	28%	39%
California	48%	46%	57%
Hawaii	56%	56%	58%
Arizona	21%	22%	14%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 29. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## C. Activities On Overnight Trips

### 1. Introduction

The 2006 TAMS questionnaire included approximately 190 activities a person may have engaged in while on a trip. In addition to capturing *incidence* of participation in this array of activities, the study asked consumers to indicate whether an activity they engaged in on *any* overnight trip in the past two years was a *main reason for taking any of these trips*.<sup>14</sup>

As noted previously, Regional Canadian Hikers, Climbers & Paddlers claim to have taken an overnight trip motivated by one or more outdoor activities in the past two years or so and to have taken pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited. Nonetheless, it is reasonable to assume that some of the hiking, paddling or climbing experiences that motivated trips among those who have been to Alberta over the past decade took place within the province.

#### **“Main Reason” and “Any Participation”**

Tourists who indicate that a particular activity is the *main reason for taking a trip* are, in effect, expressing a much more significant commitment to the activity than are those who say they engaged in a particular activity on at least one of the overnight trips they took recently. In the following section, information is presented for selected individual or groups of related activities that *drive* Regional Canadian Hikers, Climbers & Paddlers to take overnight pleasure trips (*main reason*) and the level of *any* participation in these same activities.

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<sup>14</sup> Presumably, “these trips” are those on which the specific activity took place.

## 2. Trip Activities & Drivers

### a) Major Trip Activity Groups

Like most tourists, Regional Canadian Hikers, Climbers & Paddlers take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors (see Table 14).<sup>15</sup>

- By definition, Regional Canadian Hikers, Climbers & Paddlers have taken a trip in order to engage in at least one **land-based outdoor activity** such as hiking or climbing (92%) and/or in a **water-based outdoor activity** such as kayaking or white water rafting (73%).
- Almost three-fifths claim to have to have been motivated to travel primarily so that they could have a resort, spa or lodge experience (**lodging**).
- Their enthusiasm for the outdoors is evident in Hikers, Climbers & Paddlers' propensity to take trips driven by a **winter outdoor activity** such as alpine or cross country skiing, or snowmobiling (42%).
- **Fairs and festivals** are trip motivators for over one-quarter of Regional Canadian Hikers, Climbers & Paddlers (27%). **Historic sites, building or monuments** (22%), **theme or amusement parks** and other similar types of entertainment (21%) and **spectator sporting events** (21%) prompt trips for between one-quarter and one-fifth of these Regional outdoor enthusiasts.
- By and large, Regional Canadian Hikers, Climbers & Paddlers are **not** motivated to take trips in order to have a **culinary experience**, to **shop**, attend **concerts or plays**, go to **museums, art galleries** or **Aboriginal cultural events**.

Because most Regional Canadian Hikers, Climbers & Paddlers have travelled within or to Alberta in the past decade, there are no substantive differences in the types of activities that motivate trips for the market as a whole versus those with Alberta tourism experiences.

Not surprisingly, *participation* rates for many activities are appreciably higher than are *motivation* rates. Increases in *any participation* over *motivation (main reason)* are evident for virtually every major activity group. For example, more Regional Canadian Hikers, Climbers & Paddlers *participated* in at least one water-based outdoor activity while on a

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<sup>15</sup> For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

recent overnight pleasure trip (91%) than claim to have taken a trip motivated by one of these activities (73%). The most dramatic shifts are associated with dining and shopping. Food and wine experiences are, in effect, “one-of-many” trip activities for almost all Regional Canadian Hikers, Climbers & Paddlers (89%), but the driving force behind a trip for many fewer sector members (15%). Similarly, close to 9-in-10 Regional Canadian Hikers, Climbers & Paddlers say that they went shopping on a recent trip, but only about 1-in-10 of them took the trip *in order to* shop. One-tenth of these tourists have taken a trip primarily to visit a museum even though almost half of them have included a museum among their trip activities.

\* \* \* \* \*

These findings suggest that to attract Regional Canadian Hikers, Climbers & Paddlers to Alberta or for Alberta residents to travel more frequently within the province, tourism marketers and packagers might take into account the following:

- Regional Canadian Hikers, Climbers & Paddlers are *highly focussed* travellers, with a particular enthusiasm for the outdoors.
- They may place special emphasis on specific outdoor activities for some of their trips, but many also take trips in order to engage in other outdoor sports and to utilize the lodging infrastructure that facilitates access to the activities they seek (e.g., wilderness lodges, resorts). Packaging and marketing hiking, climbing and paddling with these *other* outdoor interests may be particularly successful.
- The contrast between the very high levels of participation in dining and shopping and appreciably lower levels of trips motivated by these activities suggests that Regional Canadian Hikers, Climbers & Paddlers may require assurances that they will have opportunities to shop, eat in restaurants and/or sit at outdoor cafes while on an outdoor-focussed trip.
- Similarly, entertainment-oriented attractions, fairs and festivals, and cultural activities such as museums, concerts or plays and art galleries may be viewed as enjoyable but casual activities on trips with a more outdoor-orientation.

TABLE 14: MAJOR ACTIVITY GROUPS  
- MAIN & ANY

	Regional Canadian Hikers, Climbers & Paddlers			
	Total		Travellers within/to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(982)	(982)	(847)	(847)
Weighted, Projected	687,000	687,000	566,000	566,000
Outdoor Land-Based Activities	92%	99%	92%	99%
Outdoor Water-Based Activities	73%	91%	74%	91%
Lodging (Lodges, Resorts, etc.)	57%	92%	58%	92%
Outdoor Winter Activities	42%	59%	45%	61%
Fairs & Festivals	27%	51%	27%	53%
Historic Sites/Buildings	22%	60%	21%	61%
Theme/Amusement Parks/Movies (Entertainment)	21%	51%	20%	54%
Spectator Sports	21%	40%	22%	40%
Food & Wine	15%	89%	16%	90%
Shopping	11%	86%	11%	86%
Performing Arts	11%	36%	12%	37%
Museums	10%	47%	11%	50%
Art Galleries	7%	37%	7%	38%
Aboriginal Culture/Events	5%	23%	5%	26%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination.

## b) Individual Trip Activities: The Outdoors

Not surprisingly, Hikers, Climbers & Paddlers take trips primarily *in order to* engage in many outdoor activities and *participate* in various outdoor pursuits to an even greater extent (see Table 15).<sup>16</sup>

### Sector-Defining Activities

Of the outdoor activities that define the Hikers, Climbers & Paddlers sector, **hiking** is the most prevalent trip driver, although even more Regional Canadian sector members engage in hiking on trips (87%) than declare it to be the primary reason for a trip (70%). Western Canadian Hikers are almost evenly divided between those who go on overnight pleasure trips to take *day hikes* (48%) and those seeking overnight hikes in the wilderness (42%). Day hikes are also very popular as one-of-many outdoor activities engaged in by these Regional Canadian sector members (76%, *any*). In contrast, most sector members who go backcountry hiking do so as the main reason for a trip (42% *main*; 44% *any*).

**Canoeing or kayaking** is the second most popular *defining* trip driver among Regional Canadian Hikers, Climbers & Paddlers (25%). More of these paddlers are likely to be found on fresh water (18%) than on oceans (9%). Canoeing or kayaking as an activity (*any*) is characteristic of two-fifths of sector members (39%).

**Climbing** mountains (15%) is a more prevalent trip driver than is rock climbing (5%) among Regional Canadian Hikers, Climbers & Paddlers. Regardless of the climbing objective, one-fifth of sector members take trips in order to engage in this activity (19%) and a somewhat higher proportion include climbing as one of their trip activities (26%).

**White water rafting** prompts pleasure trips for about 1-in-8 Regional Canadian Hikers, Climbers & Paddlers (13%, *main*). Like backcountry hiking, this sport attracts comparatively few *casual* participants, with little difference between those who take a trip in order to go rafting and those who include it as one of their trip activities (16%, *any*).

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<sup>16</sup> For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

### **Other Outdoor Activities**

Camping, especially in public campgrounds, attracts almost three-quarters of Regional Canadian Hikers, Climbers & Paddlers, with about two-fifths taking pleasure trips *in order to camp* (73% any; 43% main). Other outdoor activities that attract at least three-fifths of the Regional outdoor market on an *any participation* basis include swimming in lakes, sunbathing or sitting on a beach, and going to nature parks. Two-fifths of sector members also view flora/fauna, visit well-known natural wonders, swim in oceans and go alpine skiing when travelling. Of these activities, visits to nature parks (35%) and alpine skiing (33%) are the most likely to be a primary reason for a trip.

The outdoor activity profiles for *all* Regional Canadian Hikers, Climbers & Paddlers and those with trips within or to Alberta over the past decade are almost identical, largely because of the high level of overlap between the two groups.

TABLE 15: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN &amp; ANY\*

	Regional Canadian Hikers, Climbers & Paddlers			
	Total		Travellers within/to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(982)	(982)	(847)	(847)
Weighted, Projected	687,000	687,000	566,000	566,000
<b>ACTIVITIES THAT DEFINE THE SECTOR</b>				
<b>Kayaking/canoeing (NET)</b>	<b>25%</b>	<b>39%</b>	<b>25%</b>	<b>38%</b>
Freshwater	18%	29%	20%	31%
Ocean	9%	17%	7%	15%
<b>White water rafting</b>	<b>13%</b>	<b>16%</b>	<b>14%</b>	<b>18%</b>
<b>Climbing (NET)</b>	<b>19%</b>	<b>26%</b>	<b>19%</b>	<b>26%</b>
Rock climbing	5%	9%	4%	7%
Mountain climbing/trekking	15%	20%	16%	22%
<b>Hiking (NET)</b>	<b>70%</b>	<b>87%</b>	<b>71%</b>	<b>89%</b>
Same day excursion while on a trip of one or more nights	48%	76%	50%	79%
Hiking/backpacking in wilderness settings with overnight camping or lodging	42%	44%	40%	43%
<b>OTHER OUTDOOR ACTIVITIES</b>				
<b>Camping</b>	<b>43%</b>	<b>73%</b>	<b>44%</b>	<b>74%</b>
Public campground	35%	60%	35%	61%
Private campground	14%	38%	15%	41%
Wilderness campsite	18%	33%	18%	33%
<b>Sunbathing or sitting on a beach</b>	<b>28%</b>	<b>60%</b>	<b>27%</b>	<b>60%</b>
<b>Nature park</b>	<b>35%</b>	<b>60%</b>	<b>36%</b>	<b>61%</b>
<b>Alpine skiing</b>	<b>33%</b>	<b>41%</b>	<b>35%</b>	<b>41%</b>
<b>Fishing</b>	<b>17%</b>	<b>33%</b>	<b>18%</b>	<b>35%</b>
<b>Swimming in lakes</b>	<b>22%</b>	<b>63%</b>	<b>21%</b>	<b>62%</b>
<b>Well-known natural wonders</b>	<b>16%</b>	<b>43%</b>	<b>16%</b>	<b>46%</b>
<b>Flora/fauna viewing</b>	<b>16%</b>	<b>45%</b>	<b>17%</b>	<b>48%</b>
Wildlife viewing – land-based animals	8%	28%	8%	30%
Whale watching	9%	24%	10%	27%
Wildflowers/flora	7%	25%	7%	27%
Bird watching	4%	20%	5%	21%
<b>Diving/Snorkelling (NET)</b>	<b>10%</b>	<b>25%</b>	<b>11%</b>	<b>28%</b>
<b>Swimming in oceans</b>	<b>11%</b>	<b>42%</b>	<b>11%</b>	<b>43%</b>
<b>Motor boating</b>	<b>11%</b>	<b>27%</b>	<b>11%</b>	<b>29%</b>
<b>Cycling – recreational day excursions</b>	<b>12%</b>	<b>26%</b>	<b>11%</b>	<b>26%</b>

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Activities shown here are those that are named by approximately 1-in-4 sector members as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.

**c) Individual Trip Activities: Culture and Entertainment**

Regional Canadian Hikers, Climbers & Paddlers do not bring as much enthusiasm to most cultural and entertainment pursuits as they bring to outdoor activities (see Table 16). For example, of the many cultural and entertainment options measured in the study, only seeing historic sites (22%) and/or attending spectator sporting events (21%) have been trip motivations for as many as one-fifth of Regional Canadian Hikers, Climbers & Paddlers over the past two years. In contrast, at least one-third of these western outdoor-oriented tourists include camping (43%), going to nature parks (35%), and/or alpine skiing (33%) as main reasons for recent overnight pleasure trips.

**Any Participation**

Even though cultural and entertainment activities are not necessarily strong motivators for pleasure travel by Regional Canadian Hikers, Climbers & Paddlers, more than half of these tourists stroll around cities to see architecture, and just under half go to well-known historic sites and/or cinemas as one-of-many activities on their trips. Approximately two-fifths include visits to other historic sites, buildings or monuments; general history museums; and/or art galleries among the activities in which they participate while travelling (*any*).

TABLE 16: INDIVIDUAL CULTURAL/ENTERTAINMENT ACTIVITIES – MAIN &amp; ANY\*

	Regional Canadian Hikers, Climbers & Paddlers			
	Total		Travellers within/to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(982)	(982)	(847)	(847)
Weighted, Projected	687,000	687,000	566,000	566,000
<b>Historic sites/buildings (any)</b>	22%	60%	21%	61%
Historic sites – well-known	14%	48%	12%	47%
Historic sites – other sites, buildings, monuments	8%	40%	7%	39%
<b>Spectator sporting events</b>	21%	40%	22%	40%
<b>Strolling around a city to see architecture</b>	17%	58%	15%	60%
<b>Amusement parks</b>	14%	28%	14%	30%
<b>Performing Arts (any)</b>	11%	36%	12%	37%
Live theatre	5%	23%	6%	24%
<b>Museums (any)</b>	10%	47%	11%	50%
General history museum	8%	40%	9%	43%
<b>Zoos</b>	8%	27%	9%	28%
<b>Art galleries</b>	7%	37%	7%	38%
<b>Free outdoor performances</b>	6%	26%	6%	27%
<b>Aboriginal culture/events (any)</b>	5%	23%	5%	26%
<b>Farmers' markets or country fairs</b>	5%	30%	5%	30%
<b>Casinos</b>	5%	26%	5%	25%
<b>Botanical gardens</b>	5%	28%	5%	29%
<b>Movies/cinema</b>	5%	48%	5%	47%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. \*Activities shown here are those that are named by approximately 1-in-4 sector members as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.

**d) Individual Trip Activities: Lodging, Food/Wine, Shopping****Lodging**

Resorts, including seaside, lakeside and mountain or ski resorts, drive trips for one-third of Regional Canadian Hikers, Climbers & Paddlers (*main*) and are used for lodging by almost twice as many (63%, *any*) (see Table 17). Wilderness lodges are not as popular as are various resorts, either as a trip driver or form of accommodation on a trip motivated by other activities (5% *main*; 16% *any*).

Because one-third of these Regional Canadian Hikers, Climbers & Paddlers take trips *in order to* ski and two-fifths include skiing among their trip activities (*any*), it is not surprising that as many as two-fifths claim to have been to a mountain or ski resort over the past two years (40%, *any*).

**Food & Wine**

Collectively, food and wine activities drive trips for 1-in-7 Regional Canadian Hikers, Climbers & Paddlers but are trip activities for almost 9-in-10 (89%, *any*). Dining out at restaurants offering *local* ingredients and cuisine and visiting local outdoor cafes are the most popular.

**Shopping**

Shopping for apparel, books or music, and local arts and crafts is a common trip pastime for Regional Canadian Hikers, Climbers & Paddlers, but, like culinary experiences, tends not to be the motivation for recent overnight pleasure travel.

TABLE 17: OTHER ACTIVITIES – MAIN & ANY*	Regional Canadian Hikers, Climbers & Paddlers			
	Total		Travellers within/to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(982)	(982)	(847)	(847)
Weighted, Projected	687,000	687,000	566,000	566,000
<b>Lodging (NET)**</b>	<b>57%</b>	<b>92%</b>	<b>58%</b>	<b>92%</b>
Resorts/Spas	33%	63%	34%	65%
Lakeside resort	12%	29%	13%	30%
Ski/mountain resort	18%	40%	19%	42%
Seaside resort	14%	30%	15%	32%
Wilderness/remote lodge	5%	16%	6%	18%
<b>Food &amp; Wine</b>	<b>15%</b>	<b>89%</b>	<b>16%</b>	<b>90%</b>
Dining – restaurants offering local ingredients and recipes	6%	70%	6%	73%
Dining – other high end restaurants	3%	34%	3%	35%
Local outdoor cafes	4%	57%	4%	56%
Dining – high end restaurants with international reputation	3%	25%	3%	26%
<b>Shopping</b>	<b>11%</b>	<b>86%</b>	<b>11%</b>	<b>86%</b>
Clothing, shoes, jewellery	7%	66%	8%	66%
Bookstores or music stores	4%	61%	4%	62%
Local arts & crafts studios	4%	60%	4%	62%
Antiques	4%	32%	4%	34%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. \*Activities shown here are those that are named by approximately 1-in-4 sector members as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover. \*\*Camping is included in Lodging (NET). See "Outdoor Activities" for camping as an outdoor activity.

### e) Overnight Cruises & Organized Group Tours

One-eighth of Regional Canadian Hikers, Climbers & Paddlers have recently been overnight cruise passengers (12%) (see Table 18).

Overnight touring is characteristic of approximately two-fifths of Regional Canadian Hikers, Climbers & Paddlers (41%). Somewhat more tour participants claim to have taken a **self-directed** touring trip (28%) than an **organized** overnight group tour over a two-year period (21%). Those who have gone on an overnight organized tour tend to favour *multiple* destinations (15%) over *single* destination tours (9%).

Taking a day tour while on an overnight trip is more characteristic of these Regional Canadian Hikers, Climbers & Paddlers (57%) than is taking any type of overnight tour (41%). Favoured themes for organized day excursions include tours around the countryside, in wilderness or outdoor settings, in a city, or sightseeing cruises. These same themes are popular among Regional Canadian Hikers, Climbers & Paddlers who take *self-directed* day touring excursions.<sup>17</sup>

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<sup>17</sup> See Detailed Tabulations, Volume 2, Table 15 for figures.

TABLE 18: CRUISES/GROUP TOURS	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b>Took any overnight cruise in past 2 years</b>	<b>12%</b>	<b>12%</b>	<b>15%</b>
<b>Overnight Touring (NET)</b>	<b>41%</b>	<b>42%</b>	<b>33%</b>
Organized Tour	21%	22%	18%
Multiple Locations	15%	16%	12%
Single Location	9%	10%	7%
Self-Directed Touring	28%	29%	24%
<b>Same-Day Touring on Overnight Trip (NET)</b>	<b>57%</b>	<b>60%</b>	<b>44%</b>
Self-Directed Touring	47%	50%	33%
Organized Excursion	34%	36%	23%
<b>Type of Organized Day Tour</b>			
<i>Among Organized Day Tour Takers</i>	(100%)	(100%)	(100%)*
Countryside	56%	54%	N/A
Wilderness/outdoor	56%	54%	N/A
City	50%	49%	N/A
Sightseeing cruise (day excursion)	49%	49%	N/A
Factory	15%	15%	N/A
Wineries	15%	16%	N/A
Airplane/helicopter (pilot or passenger)	13%	14%	N/A
Casino	12%	13%	N/A

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 14 through 16. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade. \*Base size is too small to warrant analysis.

## D. Trip Planning

### 1. Who Does the Planning?

Almost all Regional Canadian Hikers, Climbers & Paddlers and the segment of these tourists who have travelled within or to Alberta over the past decade claim to have *personal involvement* in trip planning for **all** or **most** trips planned over the past two years (see Table 19).

In most households, the main responsibility for travel planning falls to the outdoor enthusiast or is shared with other household member(s).

TABLE 19: TRAVEL PLANNING	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b>Frequency of personal involvement in trip planning, past 2 years</b>			
All	66%	68%	58%
Most	21%	21%	25%
Some	11%	9%	16%
None/not stated	2%	2%	1%
<b>Main responsibility for trip planning</b>			
Respondent	41%	42%	46%
Shared with other household member(s)	35%	37%	26%
Spouse/partner	10%	10%	13%
Other/not stated/not involved in travel planning	14%	12%	26%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 18 and 19. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## 2. Travel Information Sources & Travel Media

Of the many travel information sources available, relatively few enjoy widespread use among Regional Canadian Hikers, Climbers & Paddlers apart from the internet, past experience and personal connections. The **internet** tops the chart for these tourists (78%) (see Table 20). Three-fifths use anecdotal information provided by **friends and relatives** and/or rely on their own **past experience** among their sources of travel information. About half of these outdoor-oriented tourists use **maps** for travel information.

More than 1-in-3 include **official travel guides or brochures from provincial, state or national organizations** (*Official Travel Guides*), **travel agencies** or **visitor information centres** among their information sources. Slightly fewer consult newspapers as a source of travel information.

Non-Alberta Travellers in the sector are less apt to rely on many of the information sources used widely by those who have travelled within or to Alberta. Specifically, these Non-Alberta Travellers are less inclined to rely on the internet, their own past experience, maps, newspapers or automobile clubs for their travel information than are Hikers, Climbers & Paddlers with Alberta experience.

With most Regional Canadian Hikers, Climbers & Paddlers relying on the internet for travel planning and one-half saying that they *normally* visit **travel websites**, the internet offers the greatest potential for reaching this market in total. Albeit at reduced penetration, the internet is also the medium most apt to reach outdoor enthusiasts who have *not* travelled within or to Alberta over the past ten years.

Use of online travel information tools is appreciably more widespread than is readership of weekend or weekday travel sections in local newspapers or readership of most types of magazines. Nonetheless, about one-quarter of Regional Canadian Hikers, Climbers & Paddlers claim regular readership of weekend travel sections in the local paper. In a typical month, approximately 3-in-10 of these outdoor enthusiasts might be found reading a general interest magazine such as *Harper's* or the *New Yorker* or a science/geography publication such as *Canadian Geographic*.<sup>18</sup>

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<sup>18</sup> More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover.

TABLE 20: INFORMATION SOURCES FOR TRAVEL PLANNING & GENERAL MEDIA HABITS	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b><u>SOURCES OF TRAVEL PLANNING INFO</u></b>			
Internet website	78%	80%	67%
Past experience	62%	63%	55%
Advice of friends/relatives	61%	61%	59%
Maps	49%	51%	38%
Official travel guides	37%	38%	33%
Travel agent	36%	36%	38%
Visitor information centres	36%	38%	27%
Any newspaper	30%	33%	19%
Articles	25%	27%	17%
Advertisements	15%	16%	12%
Travel guide books	26%	27%	22%
Auto club	24%	28%	7%
Any television	10%	11%	4%
Programs	9%	11%	4%
Advertisements	3%	4%	1%
Travel information in mail	7%	8%	2%
Electronic newsletters via e-mail	7%	8%	2%
Trade, travel, sportsmen's shows	3%	3%	1%
<b><u>TRAVEL MEDIA*</u></b>			
Frequently read newspaper Travel Section			
In weekday editions	18%	20%	11%
In weekend editions	24%	25%	23%
Magazines read in typical month			
General interest ( <i>Harper's, New Yorker</i> )	30%	31%	24%
Science and geography ( <i>Canadian Geographic</i> )	28%	28%	25%
Home and garden	24%	24%	25%
Entertainment/music ( <i>People, TVGuide</i> )	23%	22%	25%
News ( <i>Time, Newsweek</i> )	23%	22%	23%
Health/fitness/well living	23%	24%	18%
Outdoor activities/sports	22%	23%	19%
Travel ( <i>Condé Nast, Travel &amp; Leisure</i> )	12%	13%	6%
Normally watch Travel Shows on TV	33%	35%	22%
Normally visit Travel websites	50%	53%	37%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 20,30 through 32, 34. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade. \*More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover (see Tables 30 - 33).

### 3. Internet Use for Travel Inquiries & Bookings

As noted in the previous section, most Regional Canadian Hikers, Climbers & Paddlers rely on the internet for travel *planning*. Hotel/resort (64%) and airline sites (57%), along with those provided by destination marketing organizations (DMOs) (53%), are the most commonly used (see Table 21). Almost half of these tourists also claim to visit travel planning sites such as *Expedia* or *Travelocity* (48%).

Not surprisingly, *booking* online is less common than is searching for information on the internet. Nonetheless, almost three-fifths of Regional Canadian Hikers, Climbers & Paddlers claim to have made a travel-related booking online over the past two years or so (57%). As their website preferences would suggest, the most common online bookings are for airplane tickets and accommodation and, to an appreciably smaller extent, car rentals and tickets for activities or attractions.

\* \* \* \* \*

Encouraging Regional Canadian Hikers, Climbers & Paddlers to travel more frequently in the province and convincing those who are Non-Alberta Travellers to visit Alberta may require somewhat different media strategies.

- Visibility on electronic sites is essential for both Travellers within/to Alberta and Non-Alberta Travellers.
- Partnering with hotel/lodging sites might be particularly valuable in attempting to reach Non-Alberta Travellers since these tourists are *less* reliant on destination marketing organization (DMO) websites than are travellers within or to Alberta;
- Creating goodwill ambassadors from Regional Canadian Hikers, Climbers & Paddlers who travel within or to Alberta is necessary to ensure that *advice of friends/relatives* is favourable and forthcoming.

TABLE 21: WEBSITE USAGE FOR TRAVEL PLANNING	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b>Used Internet website for travel planning, past 2 years</b>	<b>78%</b> (100%)	<b>80%</b> (100%)	<b>67%</b> (100%)
<b><u>Internet website(s) used</u></b> <i>(Among Users)</i>			
Hotel/resort	64%	65%	59%
Airline	57%	59%	46%
Destination marketing organization	53%	55%	42%
Travel planning/booking	48%	49%	42%
Attraction	43%	43%	42%
Cruise	9%	8%	11%
Motorcoach	2%	3%	*
Other	34%	31%	56%
<b>Any Internet Purchases in Past 2 Years</b> <i>(Among All Overnight Pleasure Travellers)</i>	<b>57%</b> (100%)	<b>59%</b> (100%)	<b>46%</b> (100%)**
<b><u>Items Purchased Online</u></b> <i>(Among Purchasers)</i>			
Air tickets	81%	83%	N/A
Accommodation	73%	73%	N/A
Car rental	35%	37%	N/A
Tickets for activities/attractions	29%	28%	N/A
Rail, bus, boat tickets	23%	20%	N/A
Package deal (2+ items)	15%	16%	N/A

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 21, 22. \*Total\* includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. \*Travellers within/to Alberta\* are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. \*Non-Alberta Travellers\* are sector members with no trips to Alberta reported over the past decade. \*Less than 0.5%.

\*\*Base size is too small to warrant analysis.

## E. Other Travel-Related Information

### 1. Use of Package Deals

Purchase of package deals in the past two years is relatively uncommon among Regional Canadian Hikers, Climbers & Paddlers (see Table 22). Only about 1-in-50 say they relied on a package deal for *all* or *most* of their trips over the past two years (2%) and a further 1-in-4 have used package deals for *one* or *some* of these trips (27%).

Those who purchase packages want them to include accommodation, transportation to the destination, followed by transportation at the destination, tickets for activities and attractions, and food and beverage.

TABLE 22: PACKAGE DEALS	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b>Frequency of Purchasing Packages in Past 2 Years</b>			
Most/all trips	2%	2%	3%
One/some trips	27%	28%	24%
No trips/not stated/not sure	70%	70%	73%
<b>Desired Components of Packages (Among Purchasers of Packages)</b>			
	(100%)	(100%)	(100%)*
Accommodation	91%	93%	N/A
Transport to destination	87%	92%	N/A
Transport at destination	63%	58%	N/A
Tickets for activities/attractions	55%	53%	N/A
Food and beverage	54%	49%	N/A
Other	12%	13%	N/A

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 23. \*Total\* includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. \*Travellers within/to Alberta\* are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. \*Non-Alberta Travellers\* are sector members with no trips to Alberta reported over the past decade. \*Base size is too small to warrant analysis.

## 2. Benefits Sought From Pleasure Travel

The pre-eminent benefits sought by Hikers, Climbers & Paddlers when taking a pleasure or vacation trip are getting a **break from the day-to-day environment** (75%) and **relaxation/stress reduction** (67%) (see Table 23).<sup>19</sup> Other benefits that accrue from taking holidays for about three-fifths of these outdoor enthusiasts include:

- an opportunity to **see and do new, different things**,
- creating lasting **memories**, and
- **enriching familial relationships**

At least two-fifths want to **enrich their perspectives** and/or **abandon a fixed schedule**.

Compared to Travellers within/to Alberta, those who have *not* visited the province over the past decade are somewhat more likely to view **stress reduction**, **enriching their perspectives** and having **no fixed schedule** as important benefits of pleasure travel.

Benefits with *low appeal* to Regional Canadian Hikers, Climbers & Paddlers include finding **solitude and isolation**, **having stories to tell** once the trip is over and **being pampered**.

\* \* \* \* \*

From a marketing perspective, Regional Canadian Hikers, Climbers & Paddlers might be reminded that Alberta has *unique* and *out-of-the-ordinary* trails, waterways, and terrain that can be explored in a relaxed and stress-free way. For about one-third of these outdoor enthusiasts, marketing materials might also stress the physical challenges they might encounter and overcome when hiking, climbing or paddling in Alberta.

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<sup>19</sup>Consumers were asked to indicate the importance they attach to a variety of possible *benefits* from pleasure travel using a three-point semantic scale ranging from *of no importance* to *highly important*. The figures presented in this section are the proportion of tourists who claim a benefit is *highly important*.

**TABLE 23: BENEFITS SOUGHT FROM PLEASURE TRAVEL** *(Highly important)*

	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<i>% Stating "Highly Important"</i>			
Break from day-to-day environment	75%	74%	78%
Relax/relieve stress	67%	64%	78%
See/do something new/different	61%	60%	68%
Create lasting memories	59%	60%	53%
Enrich relationship with partner/children	57%	58%	49%
Enrich perspectives	46%	43%	60%
No fixed schedule	45%	44%	52%
Knowledge of history, cultures, places	39%	40%	33%
Keep family ties alive	38%	41%	23%
Physical challenge	31%	31%	34%
Renew personal connections (non-family)	25%	28%	11%
Stimulate mind/intellectual challenge	23%	25%	14%
Solitude and isolation	16%	16%	15%
Stories to share	15%	17%	6%
To be pampered	8%	7%	12%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 25. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

### 3. Incidence of Summer/Winter Trips

Almost all Regional Canadian Hikers, Climbers & Paddlers say that they have taken an overnight pleasure trip during the summer months and close to 8-in-10 have taken winter trips (see Table 24). Winter travel is particularly characteristic of Travellers within/to Alberta. These winter trips might include those taken for winter outdoor activities such as alpine skiing, but also might include trips to Mexico or beach holidays in California.

	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
<b>Took Overnight Pleasure Trip in Past 2 Years</b>			
<b>In . . .</b>			
Summer	95%	96%	94%
Winter	77%	81%	58%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 24. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

#### 4. Memberships in Various Organizations

Auto club membership is characteristic of 2-in-5 Regional Canadian Hikers, Climbers & Paddlers (see Table 25). One-third are members of a frequent flyer program and/or a sports club. Memberships in various organizations apart from community service clubs and hotel or car rental loyalty programs (12% each) are appreciably less common.

Travellers within/to Alberta and those who have not travelled within the province over the past decade differ with respect to memberships. Non-Alberta Travellers are appreciably less inclined to hold auto club and service club memberships but more likely to be sports club members than are their counterparts who have travelled within or to Alberta over the past decade.

TABLE 25: MEMBERSHIPS	Regional Canadian Hikers, Climbers & Paddlers		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(982)	(847)	(135)
Weighted, Projected	687,000	566,000	121,000
Auto club	43%	46%	26%
Frequent flyer program	33%	33%	30%
Sports club	32%	30%	42%
Community service club	12%	13%	3%
Hotel/car rental loyalty program	12%	13%	9%
Book/reading club	6%	6%	4%
Hobby club	6%	6%	6%
Nature/environmental club	9%	10%	7%
Travel club	1%	1%	1%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 35. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers within/to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## **F. Regional Canadian Hikers, Climbers & Paddlers in 2015 and 2025**

Based on information provided by Statistics Canada, the size of the Regional Canadian Hikers, Climbers & Paddlers sector has been projected to two points in the future: 2015 and 2025 (see Table 26).

### **Growth in the Regional Canadian Adult Population**

Between 2006 when the TAMS study was conducted and 2015, it is estimated that the combined adult population of British Columbia, Alberta, Saskatchewan and Manitoba will grow by about twelve percent, from 7.3 million adults to 8.2 million adults. A longer-term projection, from 2006 to 2025, generates an estimate of nineteen percent growth, from the current 7.3 million to approximately 8.7 million adults. These growth rates are, in effect, the benchmarks against which growth in the Regional Canadian Hikers, Climbers & Paddlers sector can be assessed.

### **Growth in the Regional Canadian Hikers, Climbers & Paddlers Sector**

The Regional Canadian Hikers, Climbers & Paddlers market is expected to increase at a lower rate than the region as a whole in the shorter and longer terms. Specifically, the market will increase by eight percent between 2006 and 2015, from 687,000 to 740,000; and by five percent between 2006 and 2025, from 687,000 to 722,000.

### **Growth in the Regional Canadian Hikers, Climbers & Paddlers Sector – Travellers within/to Alberta**

By 2015, Regional Canadian Hikers, Climbers & Paddlers with past experience within or to Alberta are expected to increase by seven percent, from 566,000 in 2006 to 606,000 in 2015 and to 590,000 by 2025 (4% growth from 2006). These growth rates suggest a *lower* growth in this outdoor-oriented market in the shorter term (7%) compared to *all* regional residents travelling to Alberta (11%). The gap widens over the longer term, with the market for Regional Canadian Hikers, Climbers & Paddlers within/to Alberta growing at only about a quarter of the rate (4%) estimated for *all* regional travellers within/to Alberta (15%).

TABLE 26: PROJECTIONS TO 2015, 2025

	Number of Adults	Total Rate of Change over Current	Travellers within/to Alberta	
			Number of Adults	Rate of Change over Current
<b>Regional Canadian Adult Population</b>				
Current	7,341,000		4,546,000	
2015	8,247,000	12%	5,030,000	11%
2025	8,736,000	19%	5,233,000	15%
<b>Regional Canadian Hikers, Climbers &amp; Paddlers</b>				
Current	687,000		566,000	
2015	740,000	8%	606,000	7%
2025	722,000	5%	590,000	4%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volumes 1, 2, Table 49. Projections were provided by TNS Canadian Facts, based on Statistics Canada data.

## IV. Long-Haul Canadian Hikers, Climbers & Paddlers - Detailed Findings

### A. Setting the Stage – Long-Haul Canadian Travellers to Alberta

#### 1. Market Size – All Sectors

Tourism businesses in Alberta are competing for the attention of about 13.5 million Canadian adults who reside in Ontario, Québec or one of the four Atlantic provinces and claim to have taken at least one overnight pleasure or vacation trip over a two-year period (see Table 1). These pleasure tourists represent the vast majority (78%) of the 17.4 million adults who live in the Long-Haul Canadian market.

About 1-in-5 Canadians in the long-haul overnight pleasure travel market, or about 2.8 million, have had *some* experience with Alberta destinations over the past decade. They may have been on a vacation, visiting friends and relatives or on a business trip to the province. One-tenth of the potential market claim to have travelled to Alberta in the past two years or so (1.3 million). Most of these recent tourists to Alberta were on a pleasure or vacation trip (937,000).

<b>TABLE 1: OVERVIEW OF MARKET SIZE</b>	<b>Long-Haul Canadian Market (Ontario, Québec, Atlantic Provinces)</b>	
Unweighted base	(19,820)	
Total Adult Population*	17,435,000	
Pleasure Travellers Any Destination – Past 2 Years	13,543,000	
<b><u>Took Overnight Trips to Alberta</u></b>	<b>#</b>	<b>%</b>
Any purpose, past 10 years	2,831,000	21%
Any purpose, past 2 years	1,340,000	10%
Pleasure, past 2 years	937,000	7%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 1. \*Adults are residents 18 years of age or over.

## 2. Market Size – Hikers, Climbers & Paddlers

People who take a trip *in order to* hike, climb or paddle are only a fraction of tourists who engage in these types of outdoor activities while on their vacations. In fact, almost 4.4 million Canadians in the Long-Haul market say they have participated in one of these outdoor activities on at least one of their trips over a two-year period (32%) (see Table 2).

Of these pleasure tourists, 1.6 million claim that they took a trip *in order to* kayak, canoe, go rafting, climb rocks or mountains, or take day or overnight wilderness hikes. Thus, the Long-Haul Canadian market for Hikers, Climbers & Paddlers represents about one-eighth of the travelling public in the six eastern provinces (12%).

Long-haul Canadian Hikers, Climbers & Paddlers who have taken an overnight trip to Alberta over the past decade (*Travellers to Alberta*) represent approximately 441,000 eastern Canadians, or 1-in-33 long-haul overnight pleasure travellers (3%). They constitute over one-quarter of the total Long-Haul Canadian Hikers, Climbers & Paddlers market (28% of 1.6 million Long-Haul Canadian Hikers, Climbers & Paddlers).

Hiking, climbing and paddling enthusiasts – those for whom one of these vigorous outdoor activities is the main reason for a trip – are the focus of this report because, as the “dedicated” or “passionate” market, they represent a crystallization of the interests and characteristics that might attract more casual participants to these types of activities.

<b>TABLE 2: OVERVIEW OF HIKERS, CLIMBERS &amp; PADDLERS</b>	<b>Long-Haul Canadian Pleasure Travellers Any Destination – Past 2 Years</b>	
Unweighted base	(13,830)	
Weighted, Projected	13,543,000	
<b><u>Went Hiking, Climbing and/or Paddling on Trips</u></b>		
Any	4,373,000	32%
Main Reason for Trip	1,560,000	12%
Took Overnight Trip to/in Alberta - any purpose, past 10 years	441,000	3%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 3.

## **B. Market Profile: Long-Haul Canadian Hikers, Climbers & Paddlers**

### **1. Market Segments**

The Long-Haul Canadian Hikers, Climbers & Paddlers sector is composed of pleasure tourists who indicated that at least one of the following activities was the main reason for a recent trip:

#### **Hiking**

Day hikes on overnight trips

Hiking/backpacking in wilderness settings with overnight camping or lodging

#### **Climbing**

Rock climbing

Mountain climbing/trekking

#### **Kayaking/canoeing**

Freshwater

Ocean

#### **White water rafting**

Hiking is the sector's most popular trip driver (67%), followed by kayaking/canoeing (43%), and, at a considerable distance, by climbing (11%) and white water rafting (8%) (see Table 3).

- More hikers in the sector have taken overnight pleasure trips in the past two years primarily to take day hikes (46%) than to take overnight hikes in wilderness settings (38%).
- Climbers are almost three times as likely to have taken a trip for mountain climbing or trekking (8%) as they are to have been seeking a rock climbing experience (3%).
- Paddlers exhibit a strong preference for kayaking or canoeing in *freshwater* (40%) rather than in *oceans* (6%).

**TABLE 3: HIKING, CLIMBING & PADDLING AS  
MAIN REASONS FOR OVERNIGHT TRIPS**

	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>Hiking</b>	<b>67%</b>	<b>70%</b>	<b>65%</b>
Day hikes on overnight trips	46%	49%	46%
Hiking/backpacking in wilderness settings with overnight camping or lodging	38%	40%	36%
<b>Climbing</b>	<b>11%</b>	<b>16%</b>	<b>9%</b>
Rock climbing	3%	5%	3%
Mountain climbing/trekking	8%	13%	7%
<b>Kayaking/canoeing</b>	<b>43%</b>	<b>46%</b>	<b>41%</b>
Freshwater	40%	44%	39%
Ocean	6%	7%	5%
<b>White water rafting</b>	<b>8%</b>	<b>10%</b>	<b>7%</b>

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 2. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## 2. Geographic and Demographic Characteristics

### a) Place of Residence

Long-Haul Canadian Hikers, Climbers & Paddlers are distributed across eastern Canadian provinces in a manner that is similar to the adult population and to the overnight pleasure travel market as a whole, although there are indications that these outdoor enthusiasts are somewhat more prevalent in Québec and less prevalent in Atlantic Canada than might be expected (see Table 4).<sup>20</sup>

- One-third of eastern Canada's overnight pleasure travel market resides in Québec (33%), but a higher proportion of Long-Haul Canadian Hikers, Climbers & Paddlers live in this province (37%).
- In turn, ten percent of the region's travelling public lives in one of the four Atlantic provinces, but only six percent of Long-Haul Canadian Hikers, Climbers & Paddlers do so.
- Almost three-fifths of eastern Canada's Long-Haul Hikers, Climbers & Paddlers reside in Ontario (57%), on par with this province's share of the region's travelling public (57%).<sup>21</sup>

Consistent with the over-representation of Quebeckers within this sector, residents of Montréal (21%) and Québec City (5%) are slightly over-represented relative to their respective shares of travellers living in eastern Canada (17%, and 3% of eastern Canada's travellers, respectively). As the region's largest city, Toronto is home to about one-quarter of Long-Haul Canadian Hikers, Climbers & Paddlers (26%), on par with its share of the travelling public. Small numbers of these Long-Haul tourists live in Ottawa (5%) and Halifax (2%).

Compared to their contributions to the sector as a whole, Hikers, Climbers & Paddlers from eastern Canada who have been to Alberta over the past decade are over-represented in Ontario (67% versus 57% of the total market) and significantly under-represented among Québec residents (25% versus 37% of the total market). Correspondingly, Montréalers are under-represented among the subset of this market with travel experience in Alberta (13%).

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<sup>20</sup> See Detailed Tables, Volume 1, Table 42 for the distribution of the Canadian adult and pleasure travel markets by province/region.

<sup>21</sup> The TAMS Canada data file does *not* include information on Atlantic Canadians' place of residence by province.

TABLE 4: PLACE OF RESIDENCE	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>Ontario</b>	<b>57%</b>	<b>67%</b>	<b>53%</b>
Toronto	26%	28%	25%
Ottawa	5%	7%	4%
<b>Québec</b>	<b>37%</b>	<b>25%</b>	<b>42%</b>
Montréal	21%	13%	24%
Québec City	5%	3%	5%
<b>Atlantic Canada</b>	<b>6%</b>	<b>8%</b>	<b>5%</b>
Halifax	2%	3%	1%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 42. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## b) Personal and Household Characteristics

### Age, Gender, Household Composition

Every age group is represented among Long-Haul Canadian Hikers, Climbers & Paddlers, but the market is definitely skewed toward younger tourists (see Table 5). Half of these outdoor adventurers are between 18 and 34 years (49%). Approximately two-fifths of them are middle-aged (35 to 54 years), but only about 1-in-7 are 55 years of age or over. Men are slightly more likely than women to be Long-Haul Canadian Hikers, Climbers & Paddlers.

These tourists live in households comprised of two adults (couples, 34%), in families with children less than 18 years of age (20%) or, less commonly, alone (10%).

The age, gender and household composition profile of Long-Haul Canadian Hikers, Climbers & Paddlers who have taken an overnight trip to Alberta in the past decade is very similar to the sector as a whole.

TABLE 5: AGE, GENDER & HOUSEHOLD COMPOSITION	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>Age</b>			
18 – 24 Years	18%	14%	19%
25 – 34 Years	31%	30%	32%
35 – 44 Years	21%	22%	20%
45 – 54 Years	18%	20%	17%
55 – 64 Years	9%	9%	9%
65+ Years	5%	6%	5%
<b>Gender</b>			
Men	52%	48%	53%
Women	48%	52%	47%
<b>Household Composition</b>			
Lives alone	10%	10%	11%
Couples – no children	34%	37%	32%
Families – children under 18 years	20%	21%	20%
Families – all children 18+	5%	5%	5%
All other	32%	28%	33%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 40 and 41. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

### **Country of Birth, Education, Occupation, and Income**

Four-fifths of Long-Haul Canadian Hikers, Climbers & Paddlers were born in Canada (see Table 6). One-fifth have a high school diploma or less formal education (21%) and twice this proportion have at least one university degree (43%). Most are labour force participants (68%), although about 1-in-12 have retired.

Most of these tourists have mid-level household incomes (\$40,000 to \$99,999). Approximately one-quarter are in the lowest income bracket (24%) and the same proportion are in the highest bracket (26%).

Long-Haul Canadian Hikers, Climbers & Paddlers who have travelled in Alberta over the past decade closely resemble the market as a whole in terms of place of birth and labour force participation, but differ with respect to education and household income. Specifically, those with experience in Alberta over the past decade are especially likely to be university-educated (52%) and to have incomes of at least \$100,000 (39%).

TABLE 6: COUNTRY OF BIRTH, EDUCATION, LABOUR FORCE PARTICIPATION, INCOME	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>Country of Birth</b>			
Canada	79%	82%	78%
Other	20%	17%	22%
<b>Education</b>			
High school diploma or less	21%	17%	22%
Some post-secondary	10%	10%	10%
Post-secondary diploma or certificate	26%	20%	28%
University degree+	43%	52%	39%
<b>Labour Force Participant<sup>1</sup></b>			
Retirees	8%	10%	7%
<b>Household Income</b>			
Under \$40,000	24%	13%	28%
\$40,000 - \$59,999	18%	19%	17%
\$60,000 - \$99,999	33%	29%	34%
\$100,000+	26%	39%	20%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 36 through 39. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade. <sup>1</sup>"Labour force participant" includes working full-time, part-time and self-employed.

### 3. Competitive Destinations

#### a) Worldwide Destinations for Overnight Pleasure Trips

Almost all Long-Haul Canadian Hikers, Climbers & Paddlers say that they have taken vacations within Canada over the past two years (95%) and more than one-third claim to have travelled *only* within Canada over this time period (36%) (see Table 7).

Other major destinations for overnight pleasure trips in the past two years among Long-Haul Canadian Hikers, Climbers & Paddlers include the U.S. (47%) and, less commonly, other countries (40%). Those who have travelled to Alberta over the past decade are, however, much more likely to have travelled to *other* destinations as well. Compared to the sector as a whole, Travellers to Alberta are especially likely to have taken an overnight trip to the U.S. (62%) and to other foreign countries (51%) in the past two years.

Apart from the U.S., the most popular foreign destinations for Long-Haul Canadian Hikers, Climbers & Paddlers as a whole and Travellers to Alberta are Europe and the Caribbean.

#### Note to Readers

Activities and locations visited are *independent* of one another.

In other words, Canadian Hikers, Climbers & Paddlers claim to have taken an overnight trip motivated by kayaking, canoeing, white water rafting, rock climbing, mountain climbing or trekking, or hiking in the past two years or so and to have taken overnight pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited. Thus, Hikers, Climbers & Paddlers may or may not have engaged in one or more of the outdoor activities that define the sector in a particular country, province or state they have visited recently for an overnight pleasure trip.

TABLE 7: COMPETITIVE DESTINATIONS WORLDWIDE	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>Canada</b>	<b>95%</b>	<b>96%</b>	<b>95%</b>
Canada only	36%	23%	41%
<b>U.S.</b>	<b>47%</b>	<b>62%</b>	<b>40%</b>
<b>Other Countries (NET)</b>	<b>40%</b>	<b>51%</b>	<b>36%</b>
Europe	18%	29%	14%
Caribbean	16%	18%	15%
Mexico	7%	8%	7%
South/Central America	7%	7%	7%
Asia	5%	9%	3%
Africa/ Australia/New Zealand	4%	6%	3%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 47. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## b) Canadian Destinations

Over one-quarter of Long-Haul Canadian Hikers, Climbers & Paddlers have had some travel experience in Alberta over a ten-year period (28%) and one-tenth (11%) have been to the province on an overnight pleasure trip in the past two years (see Table 8). Not surprisingly, recent overnight pleasure travel experiences in Alberta are appreciably more common among those who have been to the province over the past decade (39%) than is the case within the sector as a whole (11%).

Recall that almost three-fifths of Long-Haul Canadian Hikers, Climbers & Paddlers *reside* in Ontario. Many of these Ontario residents travel within their own province and contribute to the dominance of Ontario as a pleasure travel destination among sector members (68%). When *intra-provincial* tourists are excluded, Ontario remains a recent destination for fewer than 2-in-10 outdoor-oriented tourists in the Long-Haul Canadian market (16%). A similar pattern is evident for Québec. Including residents of the province, Québec has been a destination for three-fifths of eastern Canada's Hikers, Climbers & Paddlers (60%). Excluding Québec residents, the province has been a recent destination for 2-in-10 of these travellers (20%).

Atlantic Canada is also popular as a destination among Long-Haul Canadian Hikers, Climbers & Paddlers (22%, including residents). Once their residents are excluded, the four Atlantic provinces remain a pleasure trip destination for 1-in-7 sector members (14%). Like Alberta at eleven percent, British Columbia attracts comparatively few Long-Haul Canadian Hikers, Climbers & Paddlers (12%). Manitoba and Saskatchewan are even less successful in attracting these eastern Canadians (4%, each).

Travellers to Alberta within the sector travel further afield within Canada than do Long-Haul Canadian Hikers, Climbers & Paddlers as a whole. Excluding the resident populations travelling within their own provinces, Québec emerges as a recent pleasure travel destination for one-third of the market segment that has been to Alberta over the past decade. British Columbia is also popular among these Travellers to Alberta (28%), followed by Atlantic Canada (22%) and Ontario (18%).

TABLE 8: CANADIAN DESTINATIONS	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>Alberta</b>			
Any purpose, past 10 years	28%	100%	-
Any purpose, past 2 years	14%	49%	-
Pleasure, past 2 years	11%	39%	-
<b>Overnight Pleasure Trips in Past 2 Years to . . .</b>			
Atlantic Canada	22%	29%	19%
Excluding Atlantic Canada Residents	14%	22%	11%
Québec	60%	63%	59%
Excluding Québec Residents	20%	34%	15%
Ontario	68%	76%	66%
Excluding Ontario Residents	16%	18%	15%
Manitoba	4%	11%	1%
Saskatchewan	4%	12%	1%
British Columbia	12%	28%	6%
Yukon	1%	2%	*
Northwest Territories	*	1%	*

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 1, 47 and 48. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade. \*Less than 0.5%.

#### 4. U.S. Pleasure Travel Destinations

Just as they do *within* Canada, Eastern Canadians tend to stay *east* when they travel to the United States. Long-Haul Canadian Hikers, Climbers & Paddlers' U.S. holiday destinations are concentrated in New York (22%) and Florida (12%). Most other states attracting at least 1-in-20 sector members are within easy driving distance from Ontario, Québec or Atlantic Canada (Maine, Michigan, Massachusetts, New Jersey, Vermont).

Although they are more likely to travel to most of the U.S. states listed below than are Long-Haul Canadian Hikers, Climbers & Paddlers as a whole, Travellers to Alberta within the sector favour the same *near border* states (e.g., New York, Maine) and sun/sea destinations such as Florida and, less commonly, California, as does the market in general.

TABLE 9: U.S. DESTINATIONS*	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
New York State	22%	29%	19%
Florida	12%	16%	11%
Maine	7%	12%	4%
Michigan	5%	8%	4%
Massachusetts	5%	9%	4%
California	5%	11%	3%
Vermont	5%	6%	4%
New Jersey	5%	4%	5%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 47. \*Total\* includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. \*Travellers to Alberta\* are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. \*Non-Alberta Travellers\* are sector members with no trips to Alberta reported over the past decade. \*States displayed represent destinations visited by at least 5% of sector members.

## 5. Destinations: Roles & Ratings

### a) Importance of Destination

Just over one-half of Long-Haul Canadian Hikers, Climbers & Paddlers claim that **destination** is their first consideration in planning a recent summer and/or winter trip (see Table 10). One-third start the planning process with a focus on the **activities** they want to enjoy while on their trip and one-quarter begin with the **type of vacation experience** they wish to have.

Eastern Canadian Hikers, Climbers & Paddlers also put a premium on **destination choice** *per se*, with more than 2-in-3 claiming that it is *extremely* or *very important* to them (69%). An even higher level of level of importance is accorded destination *per se* by the subset of these tourists with visits to Alberta over the past decade (74%).

TABLE 10: CONSIDERATIONS/ IMPORTANCE OF DESTINATION

	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>First Consideration for Most Recent Summer/Winter Trip (NET)*</b>			
Start with destination	53%	58%	50%
Start with activities	36%	35%	36%
Start with type of vacation experience	26%	26%	25%
Look for package deal	3%	2%	3%
Other/not stated	14%	17%	13%
<b>Importance of Destination</b>			
Extremely/Very Important (SUM)	69%	74%	67%
Extremely important	29%	30%	28%
Very important	40%	44%	39%
Average**	3.9	4.0	3.9

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 24 and 26. Percentages for "first consideration" do not add to 100% because not all response categories are shown and/or because multiple responses were permitted. \*Based on respondents who reported taking a summer and/or winter overnight pleasure trip in past two years. \*\*Average based on assigned values of 5 for "extremely important" to 1 for "not at all important". Averages are calculated only on those volunteering an opinion. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## b) Importance of Conditions in Destination Choice

Overnight pleasure travellers were asked to rate a variety of “conditions” in terms of their importance in making a destination choice. A three-point semantic scale was used.<sup>22</sup>

Long-Haul Canadian Hikers, Climbers & Paddlers and Travellers to Alberta within the sector resemble overnight pleasure travellers as a whole in terms of the conditions they are most apt to accord *high importance* when selecting a destination. Like other tourists, members of this sector put *feeling safe* (52%) at the top of their list (see Table 11). Over two-fifths of them seek a destination with *many things for adults to see and do* and/or want their destinations to be easily *accessible by car*<sup>23</sup> (46%, each). Somewhat fewer attach a high degree of importance to encountering *no health concerns* at their destination (41%).

The rank-order of the considerations most likely to be deemed *highly important* is the same for Long-Haul Canadian Hikers, Climbers & Paddlers and for the Long-Haul Canadian pleasure travel market as a whole, but health and safety concerns are particularly prominent among *generic* Long-Haul tourists. In light of the inherent risks associated with activities such as white water rafting, wilderness hiking, mountain and rock climbing, it is not surprising to find safety and health considerations downplayed among Long-Haul Canadian Hikers, Climbers & Paddlers.

Because they have demonstrated their willingness to get from eastern Canada to Alberta, it also comes as no surprise that Travellers to Alberta in the Long-Haul Canadian market put less emphasis on easy auto access (36%) than do Long-Haul Canadian Hikers, Climbers & Paddlers as a whole (46%).

### Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 Long-Haul Canadian Hikers, Climbers & Paddlers

	Long-Haul Canadian Hikers, Climbers & Paddlers		All Long-Haul Canadian Pleasure Tourists
	Total	Travellers To Alberta	
Feeling safe	52%	52%	65%
Convenient access by car (to destination)	46%	36%	45%
Lots for adults to see/do	46%	47%	37%
No health concerns	41%	38%	51%

<sup>22</sup> “Highly important”, “Somewhat important”, and “Of no importance”.

<sup>23</sup> The question wording suggests that variables related to transportation are associated with getting *to* the destination: *How important are each of the following conditions when choosing a destination for an out-of-town pleasure or vacation trip of one or more nights?*

About one-quarter of Long-Haul Canadian Hikers, Climbers & Paddlers include the availability of *budget*, *mid-range* or *camping* accommodation options and/or *information on the internet* in their destination selection process.

TABLE 11: CONDITIONS FOR SELECTING A DESTINATION

	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
Feeling safe	52%	52%	52%
Convenient access by car (to destination)	46%	36%	50%
Lots for adults to see/do	46%	47%	46%
No health concerns	41%	38%	43%
Budget accommodation	28%	26%	29%
Camping	28%	26%	29%
Mid-range accommodation	26%	29%	24%
Information available on internet	25%	29%	24%
Direct access by air (to destination)	21%	25%	19%
Low cost packages available	18%	15%	19%
Very different culture than own	14%	17%	13%
Lots for children to see/do	13%	12%	13%
Convenient access by train/bus (to destination)	13%	14%	13%
Familiar with culture & language	10%	6%	12%
Great shopping	7%	6%	7%
Have friends or relatives there	6%	5%	6%
Luxury accommodation	6%	6%	5%
Disabled-person-friendly	4%	3%	4%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 27. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

### c) Appeal of Various Destinations

Long-Haul Canadian Hikers, Climbers & Paddlers are most enthusiastic about British Columbia as an *appealing destination* for pleasure travel, according to this province an average rating of 8.8 on a ten-point scale (see Table 12).<sup>24</sup> On the same scale, Alberta is rated at only 7.2. Other destinations deemed *more* appealing than Alberta by Long-Haul Canadian Hikers, Climbers & Paddlers include Hawaii (8.1) and Québec (7.9).<sup>25</sup>

Alberta's rating increases substantively among Travellers to Alberta, suggesting that direct experience in the province overcomes preconceptions about it. At a rating of 8.2 within this subset of Long-Haul Canadian Hikers, Climbers & Paddlers, Alberta trails British Columbia (9.2), is at parity with Hawaii (8.1) and is ahead of every other province, territory or state covered in the study for its overall touristic appeal.

#### Summary: Highest Appeal Destinations among Long-Haul Canadian Hikers, Climbers & Paddlers

	Long-Haul Canadian Hikers, Climbers & Paddlers		All Long-Haul Canadian Pleasure Tourists
	<u>Total</u>	<u>Travellers to Alberta</u>	
British Columbia	8.8	9.2	8.3
Hawaii	8.1	8.1	8.2
Québec	7.9	7.7	7.3
Ontario	7.6	7.6	7.5
California	7.5	7.7	7.5
Nova Scotia	7.5	7.6	7.2
<b>Alberta</b>	<b>7.2</b>	<b>8.2</b>	<b>6.7</b>
Prince Edward Island	7.2	7.3	7.1

<sup>24</sup> Two image questions associated with specific destinations were included in the TAMS study. One of these asked travellers to use a ten-point bi-polar rating scale ranging from *very appealing* (10) to *very unappealing* (1) to assess each destination's appeal for a pleasure trip. The second question associated with reasons to travel to a destination is discussed in the following chapter.

<sup>25</sup> A spread of more than four tenths (0.4) between one destination and another is required to constitute a "real" difference in average ratings.

TABLE 12: APPEAL OF VARIOUS DESTINATIONS\*

	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>Alberta</b>	<b>7.2</b>	<b>8.2</b>	<b>6.7</b>
Newfoundland & Labrador	6.7	7.2	6.5
Nova Scotia	7.5	7.6	7.4
New Brunswick	6.9	6.6	7.0
Prince Edward Island	7.2	7.3	7.2
Québec	7.9	7.7	8.0
Ontario	7.6	7.6	7.5
Manitoba	4.9	4.8	4.9
Saskatchewan	4.7	4.6	4.7
British Columbia	8.8	9.2	8.6
Yukon	6.5	7.4	6.2
Northwest Territories	5.9	6.6	5.6
Nunavut	5.5	6.1	5.2
<b>U.S. STATES</b>			
New York State	6.6	6.6	6.5
Colorado	6.7	7.2	6.5
Florida	6.6	6.5	6.7
California	7.5	7.7	7.4
Hawaii	8.1	8.1	8.2
Arizona	6.8	7.1	6.6

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 28. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade. \*Averages are average ratings calculated using a ten-point bi-polar rating scale ranging from very appealing (10) to very unappealing (1). Averages are calculated on those volunteering a rating only.

#### d) Number of Good Reasons to Visit Various Destinations

The same destinations accorded high appeal ratings are also the ones that emerge at the top of Long-Haul Canadian Hikers, Climbers & Paddlers' lists for having *many good reasons* to visit on a pleasure trip (see Table 13).<sup>26</sup> Specifically, British Columbia (68%) and Québec (61%) top the list of destinations with *many good reasons* to visit. Other destinations ahead of Alberta (40%) on this image rating include Hawaii (57%), Ontario (51%) and California (48%).

As is the case for overall touristic appeal, experience with Alberta's tourism infrastructure increases Long-Haul Canadian Hikers, Climbers & Paddlers' perceptions of the province. Appreciably more tourists who have travelled within the province over the past decade claim that there are *many good reasons* to visit (68%) than is the case among those who have not been to Alberta (28%). At the same time, Travellers to Alberta are especially enthusiastic about British Columbia (87%).<sup>27</sup>

#### Summary: Highest Rated Destinations among Long-Haul Canadian Hikers, Climbers & Paddlers

	Long-Haul Canadian Hikers, Climbers & Paddlers		All Long-Haul Canadian Pleasure Tourists
	<u>Total</u>	<u>Travellers to Alberta</u>	
British Columbia	68%	87%	58%
Québec	61%	60%	47%
Hawaii	57%	59%	54%
Ontario	51%	61%	50%
California	48%	58%	47%
<b>Alberta</b>	<b>40%</b>	<b>68%</b>	<b>29%</b>
Nova Scotia	40%	50%	33%

<sup>26</sup> Consumers were asked to indicate which of three statements best described their feelings about taking a pleasure trip to the same destinations for which they rated *appeal* (see previous section). The statements were *there are NO good reasons to travel to this destination*, *SOME good reasons . . .* and *MANY good reasons to travel to this destination*.

<sup>27</sup> About 3-in-10 Hikers, Climbers & Paddlers who have travelled to Alberta in the past ten years claim to have taken an overnight pleasure trip to British Columbia in the past *two* years (see Table 8, page 78).

TABLE 13: NUMBER OF REASONS TO VISIT VARIOUS DESTINATIONS

	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<i>% stating MANY good reasons to visit destination</i>			
<b>Alberta</b>	<b>40%</b>	<b>68%</b>	<b>28%</b>
Newfoundland & Labrador	34%	45%	29%
Nova Scotia	40%	50%	36%
New Brunswick	27%	27%	26%
Prince Edward Island	34%	38%	32%
Québec	61%	60%	61%
Ontario	51%	61%	48%
Manitoba	6%	7%	6%
Saskatchewan	6%	7%	5%
British Columbia	68%	87%	61%
Yukon	25%	40%	20%
Northwest Territories	20%	32%	15%
Nunavut	15%	20%	13%
<b>U.S. STATES</b>			
New York State	34%	38%	32%
Colorado	28%	36%	25%
Florida	37%	39%	37%
California	48%	58%	44%
Hawaii	57%	59%	56%
Arizona	25%	36%	21%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 29. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## C. Activities On Overnight Trips

### 1. Introduction

The 2006 TAMS questionnaire included approximately 190 activities a person may have engaged in while on a trip. In addition to capturing *incidence* of participation in this array of activities, the study asked consumers to indicate whether an activity they engaged in on *any* overnight trip in the past two years was a *main reason for taking any of these trips*.<sup>28</sup>

As noted previously, Long-Haul Canadian Hikers, Climbers & Paddlers claim to have taken an overnight trip motivated by one or more outdoor activities in the past two years or so and to have taken pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited. Nonetheless, it is reasonable to assume that some of the hiking, paddling or climbing experiences that motivated trips among those who have been to Alberta over the past decade took place within the province.

#### **“Main Reason” and “Any Participation”**

Tourists who indicate that a particular activity is the *main reason for taking a trip* are, in effect, expressing a much more significant commitment to the activity than are those who say they engaged in a particular activity on at least one of the overnight trips they took recently. In the following section, information is presented for selected individual or groups of related activities that *drive* Long-Haul Canadian Hikers, Climbers & Paddlers to take overnight pleasure trips (*main reason*) and the level of *any* participation in these same activities.

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<sup>28</sup> Presumably, “these trips” are those on which the specific activity took place.

## 2. Trip Activities & Drivers

### a) Major Trip Activity Groups

Like most tourists, Long-Haul Canadian Hikers, Climbers & Paddlers take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors (see Table 14).<sup>29</sup>

- By definition, Hikers, Climbers & Paddlers have taken a trip in order to engage in at least one **land-based outdoor activity** such as hiking or climbing (89%) and/or in a **water-based outdoor activity** such as kayaking or white water rafting (82%).
- Over one-half claim to have to have been motivated to travel primarily so that they could have a resort, spa or lodge experience (**lodging**).
- Their enthusiasm for the outdoors is evident in Hikers, Climbers & Paddlers' propensity to take trips driven by a **winter outdoor activity** such as alpine or cross country skiing, or snowmobiling (45%).
- Approximately 3-in-10 have taken trips motivated by **fairs and festivals** (32%) or **culinary experiences** (29%) over the past two years.
- Other cultural and entertainment activities that were the primary motivation for overnight pleasure trips over the past two years for about 1-in-5 Long-Haul Canadian Hikers, Climbers & Paddlers include **historic sites, building or monuments** (22%), **theme or amusement parks** and other similar types of entertainment (21%), **performances** such as concerts or plays (19%), and **shopping** (19%).
- Comparatively few Long-Haul Canadian Hikers, Climbers & Paddlers have been motivated to take trips in order to go to **spectator sporting events, museums, art galleries** or **Aboriginal cultural events**.

There are no substantive differences in the types of activities that motivate trips for the market as a whole versus those with Alberta tourism experiences.

Not surprisingly, *participation* rates for many activities are appreciably higher than are *motivation* rates. Increases in *any participation* over *motivation (main reason)* are evident for virtually every major activity group. For example, more Long-Haul Canadian

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<sup>29</sup> For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

Hikers, Climbers & Paddlers *participated* in at least one water-based outdoor activity while on a recent overnight pleasure trip (93%) than claim to have taken a trip motivated by one of these activities (82%). The most dramatic shifts are associated with dining and shopping. Food and wine experiences are, in effect, “one-of-many” trip activities for most Long-Haul Canadian Hikers, Climbers & Paddlers (82%), but the driving force behind a trip for many fewer sector members (29%). Similarly, 3-in-4 Hikers, Climbers & Paddlers say that they went shopping on a recent trip, but only about 2-in-10 of them took the trip *in order to shop*.

\* \* \* \* \*

These findings suggest that to attract Long-Haul Canadian Hikers, Climbers & Paddlers to Alberta, tourism marketers and packagers might take into account the following:

- The market segment is *highly focussed*, with a particular enthusiasm for the outdoors.
- They may place special emphasis on specific outdoor activities for some of their trips, but many also take trips in order to engage in other outdoor sports and to utilize the lodging infrastructure that facilitates access to the activities they seek (e.g., wilderness lodges, resorts). Packaging and marketing hiking, climbing and paddling with these *other* outdoor interests may be particularly successful.
- The contrast between the very high levels of participation in dining and shopping and appreciably lower levels of trips motivated by these activities suggests that Long-Haul Canadian Hikers, Climbers & Paddlers may require assurances that they will have opportunities to shop and dine in restaurants while on an outdoor-focussed trip.
- Similarly, entertainment-oriented attractions, fairs and festivals, and cultural activities such as museums, concerts or plays and art galleries may be viewed as enjoyable but casual activities on trips with a more outdoor-orientation.

TABLE 14: MAJOR ACTIVITY GROUPS  
– MAIN & ANY

	Long-Haul Canadian Hikers, Climbers & Paddlers			
	Total		Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,549)	(1,549)	(496)	(496)
Weighted, Projected	1,560,000	1,560,000	441,000	441,000
Outdoor Land-Based Activities	89%	98%	94%	99%
Outdoor Water-Based Activities	82%	93%	82%	94%
Lodging (Lodges, Resorts, etc.)	53%	82%	56%	88%
Outdoor Winter Activities	45%	59%	52%	67%
Fairs & Festivals	32%	54%	30%	57%
Food & Wine	29%	82%	33%	89%
Historic Sites/Buildings	22%	52%	20%	65%
Theme/Amusement Parks/Movies (Entertainment)	21%	44%	24%	53%
Performing Arts	19%	36%	23%	45%
Shopping	19%	76%	22%	83%
Spectator Sports	17%	30%	17%	33%
Museums	15%	44%	14%	57%
Art Galleries	10%	33%	12%	46%
Aboriginal Culture/Events	9%	20%	11%	25%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination.

## b) Individual Trip Activities: The Outdoors

Not surprisingly, Hikers, Climbers & Paddlers take trips primarily *in order to* engage in many outdoor activities and *participate* in various outdoor pursuits to an even greater extent (see Table 15).<sup>30</sup>

### Sector-Defining Activities

Of the outdoor activities that define the Hikers, Climbers & Paddlers sector, **hiking** is the most prevalent trip driver. Eastern Canadian Hikers' trips are more likely to have been prompted by interest in *day hiking* (46%) than by *backpacking in a wilderness setting* (38%). Day hikes are also very popular as one-of-many outdoor activities engaged in by these Hikers, Climbers & Paddlers (66%, *any participation*). In contrast, most sector members who go hiking in the wilderness do so as the main reason for a trip (38% *main*; 44% *any*).

**Canoeing or kayaking** is the second most popular *defining* trip driver among Long-Haul Canadian Hikers, Climbers & Paddlers (43%). Many more of these paddlers are likely to be found on fresh water (40%) than on oceans (6%). Canoeing or kayaking as a trip motivation or an activity (*any*) is characteristic of over half of sector members (56%).

**Climbing** mountains (8%) is a more prevalent trip driver than is rock climbing (3%) among Long-Haul Canadian Hikers, Climbers & Paddlers. Regardless of the climbing objective, one-tenth of sector members take trips in order to engage in this activity (11%) and a somewhat higher proportion include climbing as one of their trip activities (16%).

**White water rafting** prompts pleasure trips for about 1-in-12 eastern Canadian Hikers, Climbers & Paddlers (8%, *main*). Like backcountry hiking and climbing, this sport attracts comparatively few *casual* participants, with little difference between those who take a trip in order to go rafting and those who include it as one of their trip activities (12%, *any*).

### Other Outdoor Activities

Camping, especially in public campgrounds, attracts two-thirds of Long-Haul Canadian Hikers, Climbers & Paddlers, with two-fifths taking pleasure trips *in order to* camp (66% *any*; 40% *main*).

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<sup>30</sup> For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

Other outdoor activities that attract at least half of the Long-Haul Canadian outdoor market on an *any participation* basis include swimming in lakes, going to nature parks, and sunbathing or sitting on a beach. Over two-fifths also view flora/fauna and/or visit well-known natural wonders. Swimming in oceans, alpine skiing and fishing are among trip activities for about one-third of these Long-Haul Canadian Hikers, Climbers & Paddlers. Of these activities, visits to nature parks (41%), sunbathing or sitting on a beach (34%) and alpine skiing (25%) are the most likely to be a primary reason for a trip.

The outdoor activity profiles for *all* Long-Haul Canadian Hikers, Climbers & Paddlers and those with trips in Alberta over the past decade are quite similar, although there are some noteworthy differences. Compared to the sector as a whole, eastern Canadian Travellers to Alberta are more apt to include the following outdoor activities among their trip activities (*any* or *main*):

- Mountain climbing/trekking;
- Alpine skiing;
- Visiting well-known natural wonders;
- Camping;
- Cycling.

\* \* \* \* \*

Marketing efforts to attract Hikers, Climbers & Paddlers from eastern Canada to Alberta will likely have to focus on outdoor experiences and vistas that are *not* widely available much closer to home. For example, eastern Canada offers many opportunities for these outdoor-oriented tourists to camp, hike, kayak, canoe, fish, swim in lakes, and so on. What eastern Canada does not provide to any great extent are opportunities to climb mountains, ski on world-class downhill runs, encounter mountain sheep or elk, or to view the Canadian Badlands. Promotion of the outdoor vistas and activities that are either *unique* or more *intense* in Alberta than these Long-Haul Canadian Hikers, Climbers & Paddlers can find in Ontario, Québec or the Atlantic provinces might entice more of these easterners to visit Alberta.

TABLE 15: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN &amp; ANY\*

	Long-Haul Canadian Hikers, Climbers & Paddlers			
	<u>Total</u>		<u>Travellers to Alberta</u>	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,549)	(1,549)	(496)	(496)
Weighted, Projected	1,560,000	1,560,000	441,000	441,000
<b><u>ACTIVITIES THAT DEFINE THE SECTOR</u></b>				
<b>Kayaking/canoeing (NET)</b>	<b>43%</b>	<b>56%</b>	<b>46%</b>	<b>62%</b>
Freshwater	40%	52%	44%	56%
Ocean	6%	12%	7%	17%
<b>White water rafting</b>	<b>8%</b>	<b>12%</b>	<b>10%</b>	<b>15%</b>
<b>Climbing (NET)</b>	<b>11%</b>	<b>16%</b>	<b>16%</b>	<b>23%</b>
Rock climbing	3%	7%	5%	9%
Mountain climbing/trekking	8%	11%	13%	17%
<b>Hiking (NET)</b>	<b>67%</b>	<b>79%</b>	<b>70%</b>	<b>81%</b>
Same day excursion while on a trip of one or more nights	46%	66%	49%	72%
Hiking/backpacking in wilderness settings with overnight camping or lodging	38%	44%	40%	46%
<b><u>OTHER OUTDOOR ACTIVITIES</u></b>				
<b>Camping</b>	<b>40%</b>	<b>66%</b>	<b>43%</b>	<b>71%</b>
Public campground	32%	56%	35%	61%
Private campground	15%	31%	17%	34%
Wilderness campsite	15%	26%	17%	30%
<b>Sunbathing or sitting on a beach</b>	<b>34%</b>	<b>56%</b>	<b>30%</b>	<b>58%</b>
<b>Nature park</b>	<b>41%</b>	<b>56%</b>	<b>45%</b>	<b>64%</b>
<b>Alpine skiing</b>	<b>25%</b>	<b>31%</b>	<b>33%</b>	<b>37%</b>
<b>Fishing</b>	<b>18%</b>	<b>30%</b>	<b>12%</b>	<b>26%</b>
<b>Swimming in lakes</b>	<b>24%</b>	<b>59%</b>	<b>18%</b>	<b>60%</b>
<b>Well-known natural wonders</b>	<b>19%</b>	<b>41%</b>	<b>25%</b>	<b>55%</b>
<b>Flora/fauna viewing</b>	<b>18%</b>	<b>46%</b>	<b>17%</b>	<b>46%</b>
Wildlife viewing – land-based animals	10%	27%	10%	29%
Whale watching	7%	20%	7%	25%
Wildflowers/flora	7%	21%	4%	18%
Bird watching	7%	24%	5%	19%
<b>Swimming in oceans</b>	<b>18%</b>	<b>38%</b>	<b>14%</b>	<b>42%</b>
<b>Motor boating</b>	<b>8%</b>	<b>24%</b>	<b>6%</b>	<b>20%</b>
<b>Cycling – recreational day excursions</b>	<b>12%</b>	<b>27%</b>	<b>16%</b>	<b>37%</b>

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. \*Activities shown here are those that are named by approximately 1-in-4 sector members as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.

### c) Individual Trip Activities: Culture and Entertainment

Long-Haul Canadian Hikers, Climbers & Paddlers do not bring as much enthusiasm to most cultural and entertainment pursuits as they bring to outdoor activities (see Table 16). For example, of the many cultural and entertainment options measured in the study, only seeing historic sites (22%) and/or strolling around cities to see architecture (21%) have been trip motivations for as many as one-fifth of Long-Haul Canadian Hikers, Climbers & Paddlers over the past two years. In contrast, at least one-third of these eastern outdoor-oriented tourists include camping (40%), going to nature parks (41%), and/or sunbathing on a beach (34%) as main reasons for recent overnight pleasure trips.

#### Any Participation

Even though cultural and entertainment activities are not necessarily strong motivators for pleasure travel by Long-Haul Canadian Hikers, Climbers & Paddlers, more than half of these tourists stroll around cities to see architecture and about two-fifths go to well-known historic sites and/or cinemas as one-of-many activities on their trips. Approximately one-third include visits to other historic sites, buildings or monuments; arts performances; general history museums; art galleries and/or spectator sporting events among the activities in which they participate while travelling (*any*).

Travellers to Alberta within the Long-Haul Canadian Hikers, Climbers & Paddlers sector are more apt to participate (*any*) in a variety of cultural and entertainment activities than are sector members as a whole. For example, 2-in-3 of them stroll through cities to see architecture, more than 1-in-2 go to well-known historic sites, and at least 2-in-5 visit other historic sites, buildings or monuments; go to general history museums, art galleries and/or movies; or attend cultural performances.

TABLE 16: INDIVIDUAL CULTURAL/ENTERTAINMENT ACTIVITIES – MAIN &amp; ANY\*

	Long-Haul Canadian Hikers, Climbers & Paddlers			
	Total		Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,549)	(1,549)	(496)	(496)
Weighted, Projected	1,560,000	1,560,000	441,000	441,000
<b>Historic sites/buildings (any)</b>	22%	52%	20%	65%
Historic sites – well-known	15%	43%	17%	58%
Historic sites – other	11%	36%	15%	47%
<b>Strolling around a city to see architecture</b>	21%	53%	26%	66%
<b>Performing Arts (any)</b>	19%	36%	23%	45%
Live theatre	13%	25%	13%	28%
<b>Spectator sporting events</b>	17%	30%	17%	33%
<b>Museums (any)</b>	15%	44%	14%	57%
General history museum	10%	33%	9%	45%
<b>Amusement parks</b>	14%	26%	16%	33%
<b>Movies/cinema</b>	13%	40%	11%	45%
<b>Free outdoor performances</b>	10%	29%	9%	33%
<b>Art galleries</b>	10%	33%	12%	46%
<b>Fireworks displays</b>	8%	27%	6%	28%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. \*Activities shown here are those that are named by approximately 1-in-4 sector members as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.

**d) Individual Trip Activities: Lodging, Food/Wine, Shopping****Lodging**

Resorts, including seaside, lakeside and mountain or ski resorts, drive trips for 3-in-10 Long-Haul Canadian Hikers, Climbers & Paddlers (*main*) and are used for lodging by over half of them (55%, *any*) (see Table 17). Wilderness lodges are not as popular as are various resorts, either as a trip driver or form of accommodation on a trip motivated by other activities (8% *main*; 14% *any*).

As noted previously, alpine skiing is more prevalent as a trip activity among eastern Hikers, Climbers & Paddlers who have travelled to Alberta in the past decade than it is among the sector as a whole. These Travellers to Alberta are more likely than the market as a whole (12%) to claim that going to a mountain or ski resort was the main reason for a trip (20%) and to have included this type of experience among their trip activities (35%, *any*).

**Food & Wine**

Collectively, food and wine activities drive trips for 3-in-10 Long-Haul Canadian Hikers, Climbers & Paddlers but are trip activities for 8-in-10 (82%, *any*). Dining out at restaurants offering *local* ingredients and cuisine (64%, *any*) and visiting local outdoor cafes (56%, *any*) are the most popular.

**Shopping**

Shopping for apparel, books or music, and local arts and crafts is a common trip pastime for Long-Haul Canadian Hikers, Climbers & Paddlers, but, like culinary experiences, tends not to be the motivation for recent overnight pleasure travel.

TABLE 17: OTHER ACTIVITIES – MAIN & ANY*	Long-Haul Canadian Hikers, Climbers & Paddlers			
	Total		Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,549)	(1,549)	(496)	(496)
Weighted, Projected	1,560,000	1,560,000	441,000	441,000
<b>Lodging (NET)**</b>	<b>53%</b>	<b>82%</b>	<b>56%</b>	<b>88%</b>
Resorts/Spas	29%	55%	34%	61%
Lakeside resort	17%	34%	20%	38%
Seaside resort	13%	26%	14%	27%
Ski/mountain resort	12%	23%	20%	35%
Wilderness/remote lodge	8%	14%	8%	16%
<b>Food &amp; Wine</b>	<b>29%</b>	<b>82%</b>	<b>33%</b>	<b>89%</b>
Dining – restaurants offering local ingredients and recipes	13%	64%	11%	71%
Local outdoor cafes	7%	56%	6%	63%
Dining – high end restaurants with international reputation	5%	23%	6%	28%
Dining – other high end restaurants	7%	34%	6%	43%
<b>Shopping</b>	<b>19%</b>	<b>76%</b>	<b>22%</b>	<b>83%</b>
Clothing, shoes, jewellery	11%	55%	12%	62%
Bookstores or music stores	9%	52%	7%	65%
Local arts & crafts studios	7%	49%	8%	57%
Antiques	6%	30%	9%	29%
Gourmet foods	3%	25%	5%	30%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Activities shown here are those that are named by approximately 1-in-4 sector members as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover. \*\*Camping is included in Lodging (NET). See "Outdoor Activities" for camping as an outdoor activity.

### e) Overnight Cruises & Organized Group Tours

One-seventh of Long-Haul Canadian Hikers, Climbers & Paddlers have recently been overnight cruise passengers (15%), whereas overnight touring is characteristic of more than two-fifths of them (45%) (see Table 18).

More tour participants claim to have taken a **self-directed** overnight touring trip (32%) than an **organized** overnight group tour over a two-year period (22%). Those who have gone on an overnight organized tour do not have a preference between *multiple* destinations (14%) or *single* destination tours (13%).

Taking a day tour while on an overnight trip is somewhat more characteristic of these Long-Haul Canadian Hikers, Climbers & Paddlers (54%) than is taking any type of overnight tour (45%). Favoured themes for organized day excursions include tours in a city, around the countryside, in wilderness or outdoor settings, or sightseeing cruises. These same themes are popular among Long-Haul Canadian Hikers, Climbers & Paddlers who take *self-directed* day touring excursions.<sup>31</sup>

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<sup>31</sup> See Detailed Tabulations, Volume 2, Table 15 for figures.

TABLE 18: CRUISES/GROUP TOURS	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>Took any overnight cruise in past 2 years</b>	<b>15%</b>	<b>18%</b>	<b>14%</b>
<b>Overnight Touring (NET)</b>	<b>45%</b>	<b>54%</b>	<b>42%</b>
Organized Tour	22%	22%	22%
Multiple Locations	14%	16%	13%
Single Location	13%	12%	13%
Self-Directed Touring	32%	45%	27%
<b>Same-Day Touring on Overnight Trip (NET)</b>	<b>54%</b>	<b>64%</b>	<b>50%</b>
Self-Directed Touring	45%	59%	40%
Organized Excursion	28%	38%	24%
<b>Type of Organized Day Tour</b>			
<i>Among Organized Day Tour Takers</i>	(100%)	(100%)	(100%)
City	63%	74%	57%
Countryside	62%	73%	56%
Wilderness/outdoor	62%	62%	61%
Sightseeing cruise (day excursion)	45%	48%	44%
Wineries	21%	31%	14%
Casino	18%	27%	13%
Factory	10%	12%	9%
Airplane/helicopter (pilot or passenger)	6%	9%	4%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 14 through 16. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## D. Trip Planning

### 1. Who Does the Planning?

Almost all Long-Haul Canadian Hikers, Climbers & Paddlers and the segment of these tourists who have been to Alberta over the past decade claim to have *personal involvement* in trip planning for **all** or **most** trips planned over the past two years (see Table 19).

In most households, the main responsibility for travel planning falls to the outdoor enthusiast or is shared with other household member(s).

TABLE 19: TRAVEL PLANNING	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>Frequency of personal involvement in trip planning, past 2 years</b>			
All	61%	69%	58%
Most	22%	21%	23%
Some	10%	8%	11%
None/not stated	7%	3%	9%
<b>Main responsibility for trip planning</b>			
Respondent	41%	48%	38%
Shared with other household member(s)	27%	28%	26%
Spouse/partner	11%	12%	11%
Other/not stated/not involved in travel planning	21%	12%	25%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 18,19. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## 2. Travel Information Sources & Travel Media

Of the many travel information sources available, relatively few enjoy widespread use among Long-Haul Canadian Hikers, Climbers & Paddlers apart from the internet, past experience and personal connections. The **internet** tops the chart for these tourists (76%) (see Table 20). Over half use anecdotal information provided by **friends and relatives** and/or rely on their own **past experience**.

Approximately two-fifths include **official travel guides or brochures from provincial, state or national organizations** (*Official Travel Guides*), **newspaper** articles or advertisements, or **maps** among their sources of travel information. Use of a **visitor information centre** or **travel agency** is characteristic of about one-third of Long-Haul Canadian Hikers, Climbers & Paddlers.

Travellers to Alberta within the sector are more intensive information users than are Long-Haul Canadian Hikers, Climbers & Paddlers as a whole. More of them rely on the following information sources than do those within the sector who have not been to Alberta and members of the sector in total:

- Internet websites
- Advice of friends/relatives
- Past experience
- Official travel guides
- Newspaper articles
- Maps
- Visitor information centres
- Travel agents
- Travel guide books
- Auto clubs

With most Long-Haul Canadian Hikers, Climbers & Paddlers relying on the internet for travel planning and half saying that they *normally* visit **travel websites**, the internet offers the greatest potential for reaching this market. Use of online travel information tools is appreciably more widespread than is readership of weekend (25%) or weekday travel sections in local newspapers (19%) or readership of most types of magazines. Nonetheless, close to 3-in-10 Long-Haul Canadian Hikers, Climbers & Paddlers claim they read news magazines like *Time* or *Newsweek*, entertainment/music magazines such as *People*, general interest magazines such as *Harper's* or the *New Yorker* and science/geography magazines like *Canadian Geographic* in a typical month.<sup>32</sup>

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<sup>32</sup> More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover.

Visits to travel websites, frequent reading of the travel sections in weekend and weekday newspapers are more characteristic of Hikers, Climbers & Paddlers who have been to Alberta over the past decade than they are among sector members as a whole.

TABLE 20: INFORMATION SOURCES FOR TRAVEL PLANNING &amp; GENERAL MEDIA HABITS

	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>SOURCES OF TRAVEL PLANNING INFO</b>			
Internet website	76%	87%	72%
Advice of friends/relatives	59%	67%	56%
Past experience	57%	67%	53%
Official travel guides	42%	51%	38%
Maps	42%	52%	37%
Any newspaper	39%	47%	35%
Articles	34%	43%	31%
Advertisements	22%	19%	23%
Visitor information centres	36%	43%	34%
Travel agent	32%	39%	28%
Travel guide books	23%	38%	17%
Auto club	18%	24%	15%
Travel information in mail	16%	19%	14%
Any television	14%	11%	16%
Programs	11%	10%	11%
Advertisements	8%	5%	9%
Trade, travel, sportsmen's shows	6%	7%	5%
Electronic newsletters via e-mail	5%	7%	5%
<b>TRAVEL MEDIA*</b>			
Frequently read newspaper Travel Section			
In weekday editions	19%	24%	17%
In weekend editions	25%	34%	21%
Magazines read in typical month			
News ( <i>Time, Newsweek</i> )	30%	31%	29%
Entertainment/music ( <i>People, TVGuide</i> )	29%	24%	31%
General interest ( <i>Harper's, New Yorker</i> )	28%	30%	28%
Science/Geography ( <i>Canadian Geographic</i> )	27%	27%	27%
Food/cooking ( <i>Gourmet, Bon Appetit</i> )	26%	29%	25%
Travel ( <i>Condé Nast, Travel &amp; Leisure</i> )	16%	10%	18%
Normally watch Travel Shows on TV	37%	32%	38%
Normally visit Travel websites	53%	60%	50%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 20.30-32, 34. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade. \*More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover (see Tables 30 - 33).

### 3. Internet Use for Travel Inquiries & Bookings

As noted in the previous section, most Long-Haul Canadian Hikers, Climbers & Paddlers rely on the internet for travel *planning*. Destination marketing organization (DMO) and hotel/resort sites are the most commonly used (see Table 21). Other sites used by at least 2-in-5 internet users include attraction sites, travel planning sites such as *Expedia* or *Travelocity* and airline sites. Possibly because they are more widely travelled than typical Long-Haul Canadian Hikers, Climbers & Paddlers, Travellers to Alberta are particularly likely to visit hotel, travel planning and airline websites.

Not surprisingly, *booking* online is less common than is searching for information on the internet. Nonetheless, close to one-half of Long-Haul Canadian Hikers, Climbers & Paddlers claim to have made a travel-related booking online over the past two years or so (48%). Online purchases are appreciably more common among Travellers to Alberta (62%) than among Non-Alberta Travellers (42%).

As their website preferences would suggest, the most common online bookings are for accommodation and air tickets and, to a lesser degree, tickets for attractions, car rentals and rail/bus or boat fares. Compared to sector members as a whole, those who have travelled to Alberta over the past ten years are especially likely to have made online purchases of airline tickets, car rentals, and to a lesser extent, other transportation tickets (e.g., rail, bus).

\* \* \* \* \*

Since they have both obtained travel information and been to Alberta over the past decade, Travellers to Alberta provide the most salient guidance about how to reach *other* eastern Canadian Hikers, Climbers & Paddlers and encourage them to come to Alberta. In this context, internet, print media and provision of a wonderful experience to those who come to Alberta are worthy of special notice.

- Specifically, maintenance of Alberta's DMO websites and visibility on electronic sites such as *Expedia* or *Travelocity* are essential;
- Widely used print media include maps, official travel guides and editorial coverage in newspapers;
- By keeping Alberta's information prominently displayed and up-to-date at travel agencies, more Long-Haul Canadian Hikers, Climbers & Paddlers might be encouraged to visit the province;

- Maintaining current and salient information at visitor information centres for eastern Canadians who come to Alberta for paddling, hiking or climbing may enhance their visit to the province and encourage them to endorse Alberta as an outdoor destination among their friends and neighbours once they return home;
- Creating goodwill ambassadors from outdoor-oriented tourists from eastern Canada who have travelled in Alberta is necessary to ensure that *advice of friends/relatives* is favourable and forthcoming. To meet this objective, Alberta has to deliver on its promises. Based on the high overall rating by Long-Haul Canadian Hikers, Climbers & Paddlers who have been to Alberta over the past decade (8.2 on a ten point scale), the province seems to be achieving this goal.

TABLE 21: WEBSITE USAGE FOR TRAVEL PLANNING	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>Used Internet website for travel planning, past 2 years</b>	<b>76%</b> (100%)	<b>87%</b> (100%)	<b>72%</b> (100%)
<b><u>Internet website(s) used</u></b> (Among Users)			
Destination marketing organization	61%	64%	60%
Hotel/resort	57%	66%	52%
Attraction	44%	48%	42%
Travel planning/booking	43%	56%	37%
Airline	40%	59%	32%
Cruise	6%	9%	5%
Motorcoach	4%	4%	3%
Other	38%	37%	39%
<b>Any Internet Purchases in Past 2 Years</b> (Among All Overnight Pleasure Travellers)	<b>48%</b> (100%)	<b>62%</b> (100%)	<b>42%</b> (100%)
<b><u>Items Purchased Online</u></b> (Among Purchasers)			
Accommodation	74%	74%	74%
Air tickets	62%	85%	49%
Tickets for activities/attractions	28%	22%	31%
Car rental	27%	42%	18%
Rail, bus, boat tickets	20%	29%	15%
Package deal (2+ items)	15%	13%	16%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 21, 22. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## E. Other Travel-Related Information

### 1. Use of Package Deals

Purchase of package deals in the past two years is relatively uncommon among Long-Haul Canadian Hikers, Climbers & Paddlers (see Table 22). One-in-twenty say they relied on a package deal for *all* or *most* of their trips over the past two years (5%) and over 1-in-4 have used package deals for *one* or *some* of these trips (28%).

Those who purchase packages want them to include accommodation, transportation to the destination, followed by food and beverage, transportation at the destination and tickets for activities and attractions.

TABLE 22: PACKAGE DEALS	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>Frequency of Purchasing Packages in Past 2 Years</b>			
Most/all trips	5%	1%	7%
One/some trips	28%	34%	26%
No trips/not stated/not sure	66%	65%	67%
<b>Desired Components of Packages (Among Purchasers of Packages)</b>			
Accommodation	91%	94%	89%
Transport to destination	78%	79%	78%
Food and beverage	66%	63%	67%
Transport at destination	48%	50%	48%
Tickets for activities/attractions	41%	31%	45%
Other	15%	15%	15%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 23. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## 2. Benefits Sought From Pleasure Travel

Two *sets* of benefits for taking pleasure or vacation trips characterize Long-Haul Canadian Hikers, Climbers & Paddlers (see Table 23).<sup>33</sup> At the top of the list are the trip's ability to offer the traveller a **break from the day-to-day environment** (76%) and to **relieve stress** (69%). The second set, endorsed as benefits of holidays by about 1-in-2 of these tourists, includes forming the basis of **lasting memories**; opportunities to **see and do new, different things**; **enriching familial relationships**; and **abandoning a fixed schedule**.

Those who have and have not travelled to Alberta over the past decade display similar attitudes towards the benefits of holidays. Nonetheless, Travellers to Alberta are somewhat more inclined to want to see and do new and different things, to enrich their perspectives, expand their knowledge of history, culture and places, and to engage in activities that present them with physical challenges than are Non-Alberta Travellers.

Benefits with *low appeal* to Long-Haul Canadian Hikers, Climbers & Paddlers include **having stories to tell** once the trip is over, finding **solitude and isolation**, and **being pampered**.

\* \* \* \* \*

From a marketing perspective, Long-Haul Canadian Hikers, Climbers & Paddlers might be reminded that Alberta has *unique* and *out-of-the-ordinary* hiking, climbing and/or paddling opportunities that can be experienced in a relaxed and stress-free way. These tourists, and most particularly those who have been to the province, want their trip to be *memorable*, and to represent experiences they would not have elsewhere.

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<sup>33</sup>Consumers were asked to indicate the importance they attach to a variety of possible *benefits* from pleasure travel using a three-point semantic scale ranging from *of no importance* to *highly important*. The figures presented in this section are the proportion of tourists who claim a benefit is *highly important*.

**TABLE 23: BENEFITS SOUGHT FROM PLEASURE TRAVEL** *(Highly important)*

	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected <i>% Stating "Highly Important"</i>	1,560,000	441,000	1,119,000
Break from day-to-day environment	76%	73%	78%
Relax/relieve stress	69%	67%	69%
Create lasting memories	56%	57%	56%
See/do something new/different	55%	67%	50%
Enrich relationship with partner/children	50%	50%	51%
No fixed schedule	49%	41%	52%
Enrich perspectives	40%	48%	37%
Keep family ties alive	35%	38%	34%
Knowledge of history, cultures, places	35%	43%	32%
Physical challenge	30%	36%	28%
Stimulate mind/intellectual challenge	26%	30%	25%
Renew personal connections (non-family)	19%	26%	16%
Stories to share	15%	15%	15%
Solitude and isolation	15%	17%	14%
To be pampered	11%	12%	11%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 25. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

### 3. Incidence of Summer/Winter Trips

Almost all Long-Haul Canadian Hikers, Climbers & Paddlers say that they have taken an overnight pleasure trip during the summer months and 3-in-4 have taken winter trips (see Table 24). Winter travel is particularly characteristic of Travellers to Alberta. These winter trips might include those taken for winter outdoor activities such as downhill skiing in the Rockies, but could also include beach holidays in Florida or the Caribbean.

	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
<b>Took Overnight Pleasure Trip in Past 2 Years</b>			
<b>In . . .</b>			
Summer	96%	97%	95%
Winter	75%	84%	72%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 24. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

#### 4. Memberships in Various Organizations

Auto club membership is characteristic of about one-third of Long-Haul Canadian Hikers, Climbers & Paddlers (see Table 25). Over one-quarter are members of a sports club and/or frequent flyer program. Frequent flyer program membership is more characteristic of Travellers to Alberta (46%) than it is among those who have not travelled within the province over the past decade (18%). This finding is consistent with the increased propensity of Long-Haul Canadian Hikers, Climbers & Paddlers who have travelled in Alberta over the past ten years to travel outside Canada and to rely on airline websites for travel information and bookings.

Although not prominent in either subset, memberships in hotel or car rental loyalty programs are more common among Travellers to Alberta (18%) than they are among Non-Alberta Travellers (5%).

TABLE 25: MEMBERSHIPS	Long-Haul Canadian Hikers, Climbers & Paddlers		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(1,549)	(496)	(1,053)
Weighted, Projected	1,560,000	441,000	1,119,000
Auto club	35%	39%	33%
Sports club	28%	32%	26%
Frequent flyer program	26%	46%	18%
Community service club	11%	12%	11%
Hotel/car rental loyalty program	9%	18%	5%
Nature/environmental club	9%	13%	8%
Hobby club	8%	11%	7%
Book/reading club	4%	6%	3%
Travel club	2%	2%	1%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 35. "Total" includes travellers 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of hiking, climbing or paddling. "Travellers to Alberta" are sector members who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are sector members with no trips to Alberta reported over the past decade.

## **F. Long-Haul Canadian Hikers, Climbers & Paddlers in 2015 and 2025**

Based on information provided by Statistics Canada, the size of the Long-Haul Canadian Hikers, Climbers & Paddlers sector has been projected to two points in the future: 2015 and 2025 (see Table 26).

### **Growth in the Long-Haul Canadian Adult Population**

Between 2006 when the TAMS study was conducted and 2015, it is estimated that the combined adult population of Ontario, Québec and the four Atlantic provinces will grow by eleven percent, from 17.4 million adults to 19.3 million adults. A longer-term projection, from 2006 to 2025, generates an estimate of seventeen percent growth, from the current 17.4 million to approximately 20.4 million adults. These growth rates are, in effect, the benchmarks against which growth in the Long-Haul Canadian Hikers, Climbers & Paddlers sector can be assessed.

### **Growth in the Long-Haul Canadian Hikers, Climbers & Paddlers Sector**

The Long-Haul Canadian Hikers, Climbers & Paddlers market is expected to increase at a lower rate than the region as a whole over the shorter projection period and at a *much lower* rate over the longer time span. Specifically, the market will increase by seven percent between 2006 and 2015, from 1,560,000 to 1,672,000; and by only four percent between 2006 and 2025, from 1,560,000 to 1,626,000. In absolute terms, this is a negative growth scenario over the long term, with fewer Hikers, Climbers & Paddlers in the eastern Canadian market in 2025 than are expected to be in the market in 2015.

### **Growth in the Long-Haul Canadian Hikers, Climbers & Paddlers Sector – Travellers to Alberta**

By 2015, Long-Haul Canadian Hikers, Climbers & Paddlers with past experience in Alberta are expected to increase by two percent, from 441,000 in 2006 to 451,000 in 2015. Negative growth is projected between 2006 and 2025, bringing the market for Alberta-bound Hikers, Climbers & Paddlers down from the current level (441,000) to about 435,000 (-1%). These growth rates are substantively below the projected growth of *all* long-haul residents travelling to Alberta of 10% to 2015 and 15% between 2006 and 2025.

TABLE 26: PROJECTIONS TO 2015, 2025

	Total		Travellers to Alberta	
	Number of Adults	Rate of Change over Current	Number of Adults	Rate of Change over Current
<b>Long-Haul Canadian Adults</b>				
Current	17,435,000		2,831,000	
2015	19,303,000	11%	3,117,000	10%
2025	20,376,000	17%	3,261,000	15%
<b>Long-Haul Canadian Hikers, Climbers &amp; Paddlers</b>				
Current	1,560,000		441,000	
2015	1,672,000	7%	451,000	2%
2025	1,626,000	4%	435,000	-1%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volumes 1, 2, Table 49. Projections were provided by TNS Canadian Facts, based on Statistics Canada data.

## V. Appendices

### A. About the Travel Activities and Motivation Survey (TAMS)

The 2006 Travel Activities and Motivation Survey (TAMS) was sponsored by the following organizations:

Alberta Tourism, Parks, Recreation and Culture <sup>34</sup>	Ontario Tourism Marketing Partnership
Atlantic Canada Tourism Partnership	Parks Canada
Canadian Tourism Commission	Québec Ministry of Tourism
Department of Canadian Heritage	Statistics Canada
Government of Northwest Territories	Tourism British Columbia
Government of Yukon	Tourism Manitoba
Ontario Ministry of Tourism	Tourism Saskatchewan

Statistics Canada conducted the Canada portion of the study between January and June 2006. The universe under study was defined to be Canadian adults (18 years and over). The study consisted of a telephone survey using a disproportional sample of randomly generated telephone numbers in Canada's ten provinces, followed by a mailback survey among selected respondents. The overall response rate to the telephone survey was approximately 56%. Canadian adults who claimed to have taken an overnight out-of-town trip over the two years preceding the fieldwork qualified to receive the paper questionnaire. The response rate to this mailback portion of the study was about 54%. Thus, the Canadian database consists of 53,150 completed records from the telephone survey and 24,692 completed paper questionnaires.<sup>35</sup>

Survey data were weighted and projected to the Canadian adult population based on Statistics Canada Census estimates of household size, age and gender at a variety of city/province and/or regional levels in the country's ten provinces.

Research Resolutions used the TAMS Canada data files provided by TAMS partners. As such, the firm takes no responsibility for the quality of the data or the accuracy of the weighting and projection processes.

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<sup>34</sup> Formerly *Alberta Economic Development*.

<sup>35</sup> The base for all tabulations includes 24,692 Canadians who completed both the paper questionnaire and telephone interview and 7,007 who responded only to the telephone survey, for a total of 31,699 Canadian adults.

**B. Definition of Hikers, Climbers & Paddlers**

HIKING, CLIMBING, PADDLING ACTIVITIES	
Kayaking/canoeing	
	Kayaking or canoeing — freshwater
	Kayaking or canoeing — ocean
White water rafting	White water rafting
Climbing	
	Climbing — Ice climbing (Not included in TAMS Canada file as "main reason")
	Climbing — Rock climbing
	Climbing — Mountain climbing/trekking
Hiking	
	Hiking — same day excursion while on a trip of one or more nights
	Hiking/Backpacking in wilderness settings with overnight camping or lodging