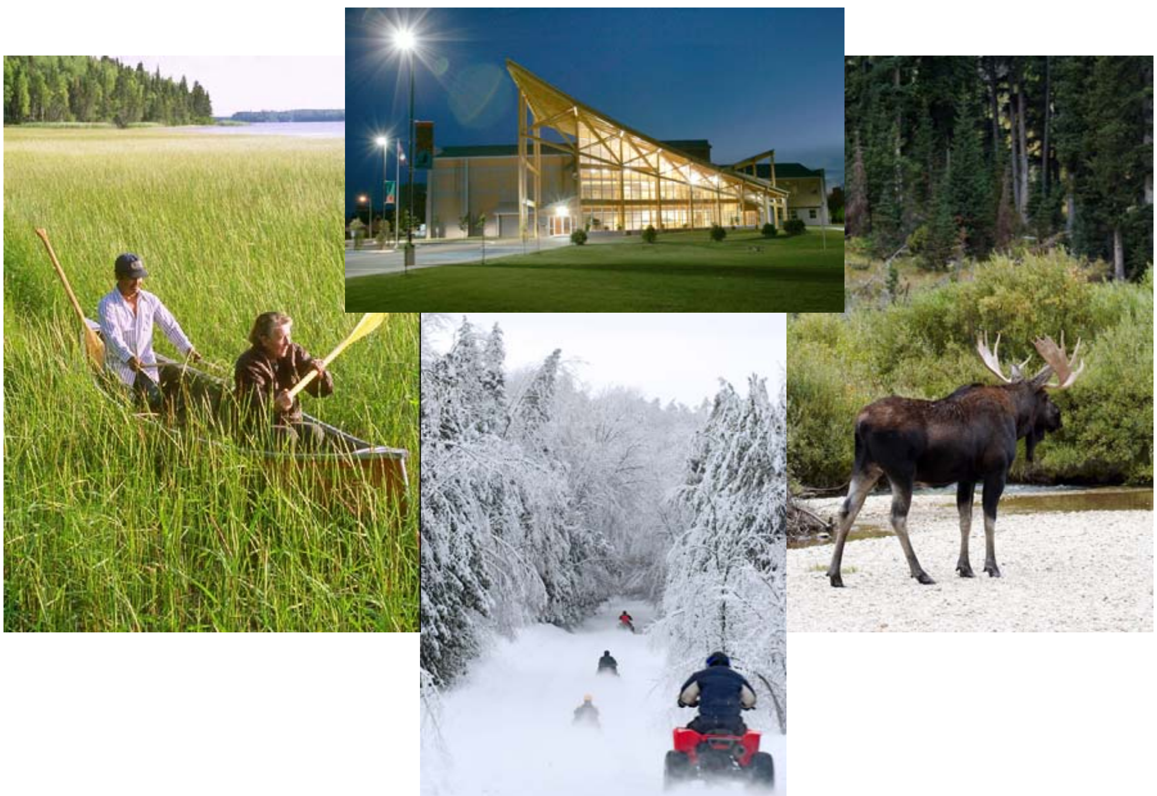
Dryden Region
Tourism Market Analysis



By:

McSweeney & Associates
MANAGEMENT CONSULTANTS

November 17, 2008

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Vicki Kurz
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November 17, 2008

Dear Vicki:

On behalf of McSweeney & Associates, I am pleased to submit the Dryden Region Tourism Market Analysis.

This report provides an overview of the Northwest Ontario tourism market and the travel behaviours of its visitors. It also provides a detailed analysis of Canadian and American travellers who engage in outdoor activities while on a trip. In addition, the report examines the preferences and behaviours of specific traveller types based on the outdoor activity in which they engage. And finally, the report concludes with insight on tourism trends and an industry outlook.

Thank you for this opportunity and we look forward to working on the next phase of the project - the Tourism Development and Marketing Strategy. I would be pleased to discuss any aspect of this report with you at your convenience.

Yours truly,

E. McSweeney

Eric McSweeney
President

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1. Profile of Travellers to Northern Ontario

The following section provides a general profile of travellers to Northern Ontario. An overview of the market size and origin of travellers to Northern Ontario and the Kenora District will be examined. Their demographic profile such as average age, education level and household income will be compared to the average Canadian and American pleasure traveller. To end with, details on the preferences of Northern Ontario travellers will be provided.

1.1. Market Size and Origin

Between 2004 and 2005, Northern Ontario received more than 3 times the number of Canadian travellers than American travellers. Based on the Travel Activities and Motivations Survey (TAMS) *Canadian Travellers Who Visited Northern Ontario* report (June 2007):

- 3.7 million Canadians visited Northern Ontario in 2004-05.
- 77.9% originated from Ontario of which 29.7% (1,116,000) were from Toronto.
- Outside of Ontario, Quebec accounted for the largest percentage of travellers (9.5%) visiting Northern Ontario, followed by Manitoba at 4.6%.

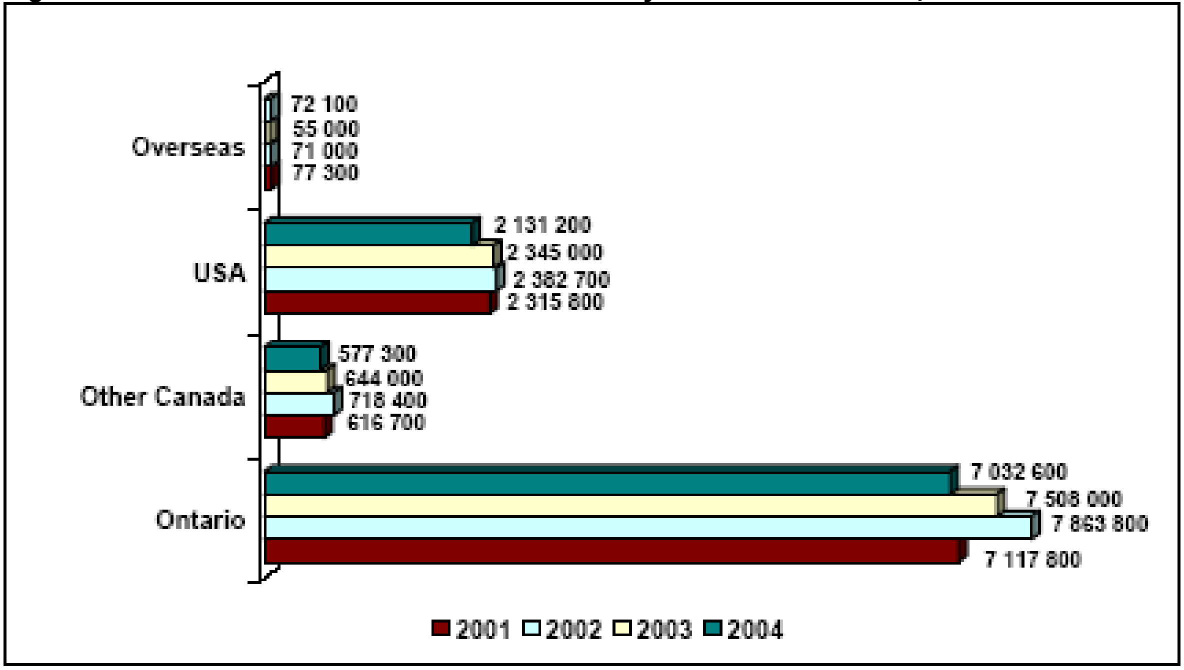
As indicated in the *U.S. Travellers Who Visited Northern Ontario* TAMS report (February 2007):

- 1.4 million Americans visited Northern Ontario in 2004-05.
- 63.3% of the U.S. travellers visiting Northern Ontario originated from the long-haul market (more than 300km from the Ontario border).
- The near market (within 300 km of the Ontario border) had a higher incidence[1] of American travellers to Northern Ontario.

The following figure demonstrates that from 2001 to 2004, the majority of tourists to Northern Ontario were from Ontario (including residents of Northern Ontario who travel within the North).

[1] A higher percentage of the population from the near market had visited Northern Ontario yet because of their relatively smaller population size compared to the rest of the U.S. population, they are not the largest segment of the American market to Northern Ontario.

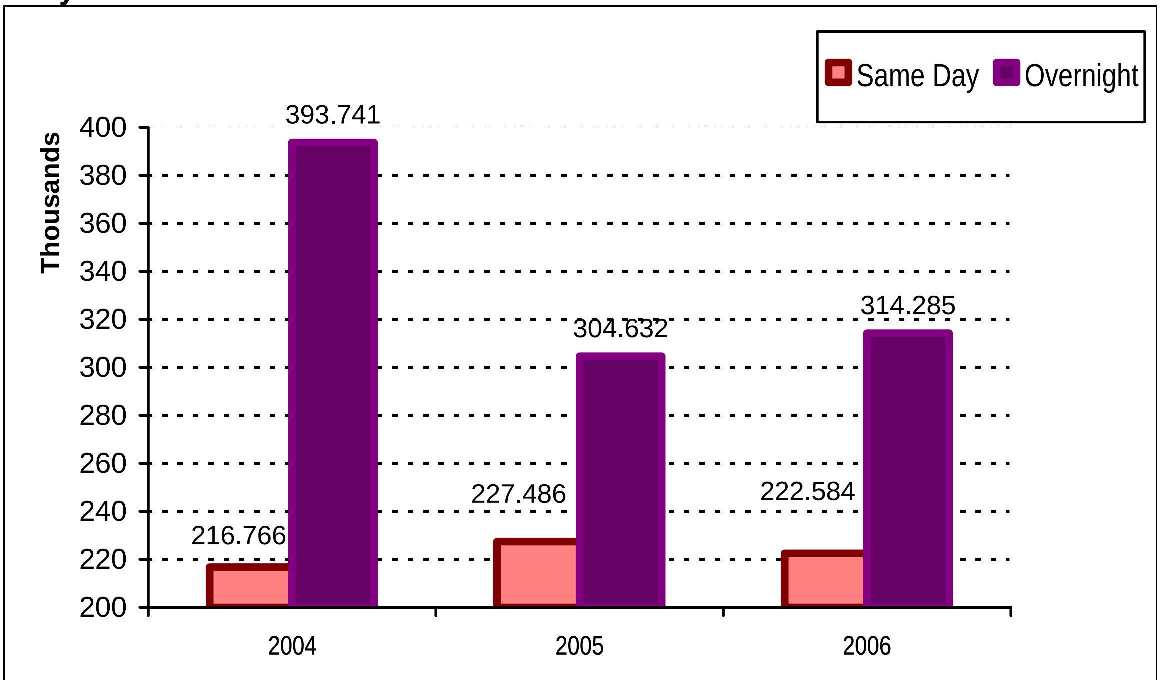
Figure 1: Tourism Volume in Northern Ontario by Place of Residence, 2001 to 2004



Source: FedNor, *An Overview of Tourism in Northern Ontario*, 2004

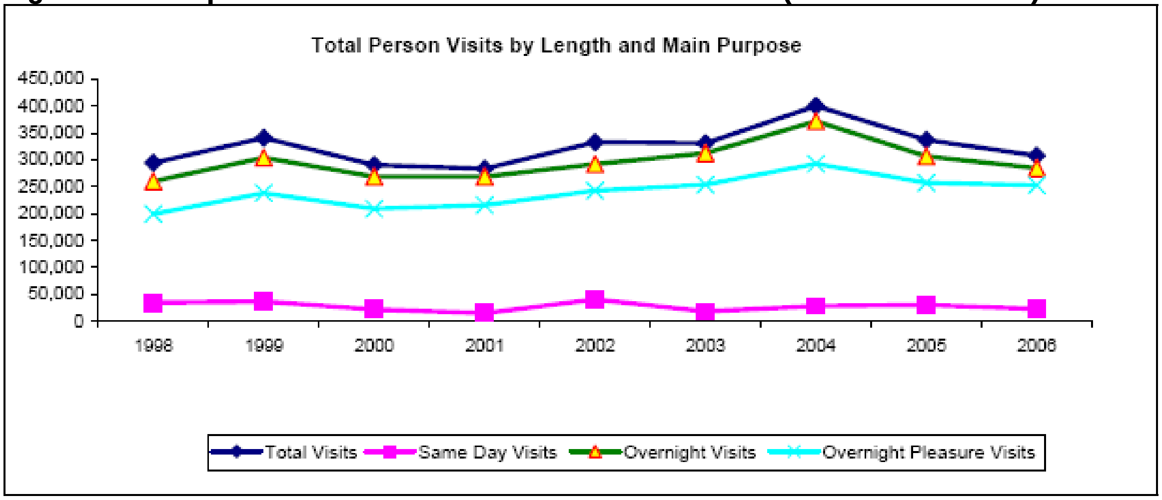
The figure below reveals that the number of overnight American travellers from the Fort Frances border crossing declined sharply in 2005 with modest growth in 2006.

Figure 2: Total visits from USA to Northwest Ontario from the Fort Frances port of entry



The following graph indicates that in 2006, the number of overnight pleasure visitors to the Kenora District dropped from the high of 2004 closer to the averages of 1998-2001.

Figure 3: Total person visits in Kenora District 1998-2006 (U.S. and overseas)



Source: Ontario Ministry of Tourism: Regional Tourism Profiles, Kenora District, 2006

The next table demonstrates that:

- Between 1998 and 2006, total visits (U.S. and overseas travellers) to the Kenora District increased overall by 4%, from 294,921 to 308,072. Of these visitors, 285,045 or 93% stayed in the area for one or more nights.
- During that same period, total visits by U.S. residents to the Kenora District increased by 6%, from 288,275 to 305,242.
- Foreign travellers from countries other than the U.S. to the Kenora District decreased by 57% between 1998 and 2006, from 6,646 to 2,831.

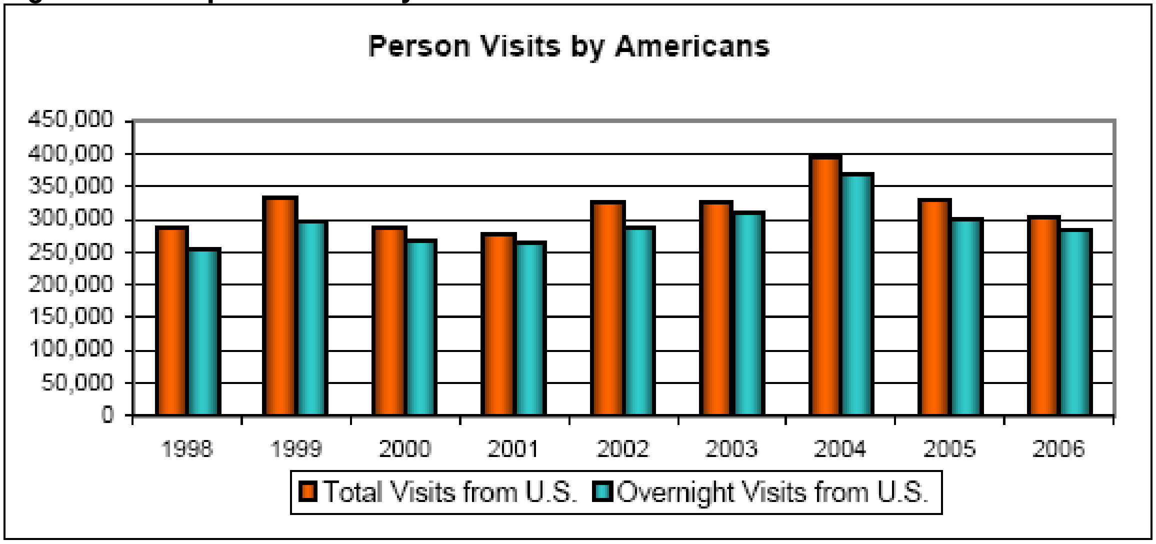
Table 1: Total person visits by length of stay and main purpose

Title/Year	1998	1999	2000	2001	2002	2003	2004	2005	2006
Total Visits	294,921	341,308	290,977	283,917	333,268	331,314	400,680	337,503	308,072
Same Day Visits	34,702	36,743	22,094	15,031	40,730	18,444	28,528	30,447	23,028
Overnight Visits	260,219	304,565	268,883	268,886	292,537	312,869	372,153	307,055	285,045
Overnight Pleasure Visits	199,416	238,633	209,123	215,807	243,007	254,206	293,179	257,362	253,001
Overnight VFR Visits	13,234	29,504	10,134	16,797	21,117	15,874	13,564	10,356	17,382
Overnight Business Visits	11,611	3,548	1,443	6,582	6,626	5,217	2,845	1,317	3,242
Other Overnight Visits	35,959	32,879	48,183	29,700	21,786	37,572	62,564	38,021	11,420

Source: Ontario Ministry of Tourism: Regional Tourism Profiles, Kenora District, 2006

The decline in American travellers to the Kenora District is graphically demonstrated in the following figure. The number of overnight visits in 2006 faired comparatively well to the levels of 1998, 2000 and 2001.

Figure 4: Total person visits by Americans in Kenora District 1998-2006



Source: Ontario Ministry of Tourism: Regional Tourism Profiles, Kenora District, 2006

Of the total overnight visitors in the Kenora District:

- 253,001 (89%) were on pleasure trips
- 17,382 (6%) were travelling to visit friends and relatives
- 3,242 (1%) were on a business trip
- 11,420 (4%) were travelling for other reasons.

Table 2: Overnight person visits in the Kenora District by main purpose and place of residence 1998-2006

Title/Year	1998	1999	2000	2001	2002	2003	2004	2005	2006
Overnight pleasure (US)	195,567	235,693	207,891	214,383	238,961	252,870	290,501	253,520	252,190
Overnight VFR (US)	11,895	25,112	9,152	14,628	19,127	13,108	12,419	8,192	17,080
Overnight business (US)	10,900	3,189	1,108	6,430	6,626	5,217	2,845	1,165	3,148
Overnight pleasure (Other Countries)	3,848	2,940	1,232	1,425	4,047	1,335	2,678	3,842	811
Overnight VFR (Other Countries)	1,339	4,392	982	2,169	1,991	2,766	1,145	2,164	302
Overnight business (Other Countries)	711	360	335	152	0	0	0	152	94

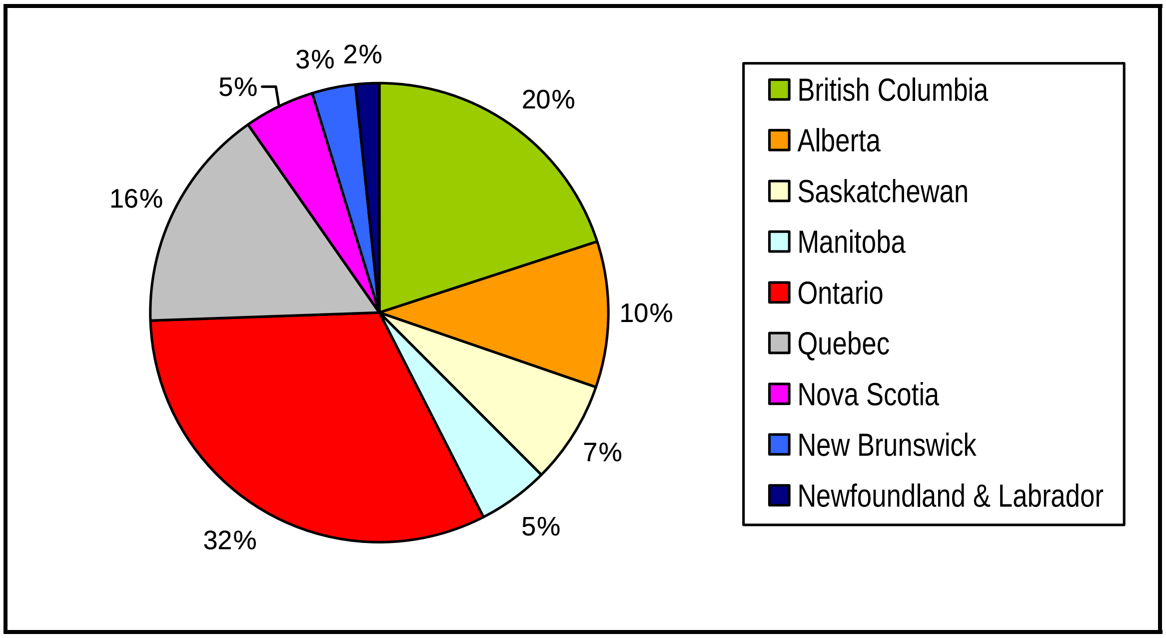
Source: Ontario Ministry of Tourism: Regional Tourism Profiles, Kenora District, 2006

The following two figures are based on the data provided by the Dryden Travel Information Centre regarding the number of people who visited the centre from 2003 to 2006.

It is important to note that travellers familiar with the region would likely not have stopped at the Visitor Information Centre, thus travellers from Manitoba may be underrepresented.

Based on this data, Canadians guests between 2003 and 2006 originated predominately from the province of Ontario (32%).

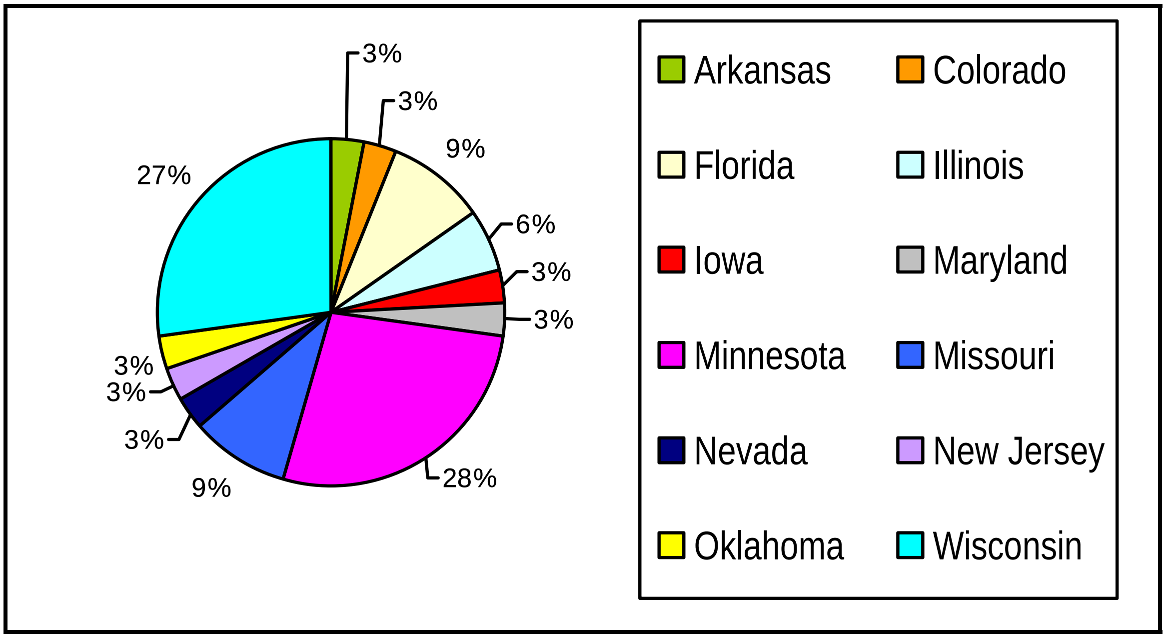
Figure 5: Origin of Canadian guests to the Dryden Travel Information Centre, 2003 to 2006



Source: Dryden Travel Information Centre

Between 2003 and 2006, Americans who stopped at the Dryden Information Centre were predominantly from the bordering States of Wisconsin (27%) and Minnesota (28%), as demonstrated in the following pie chart.

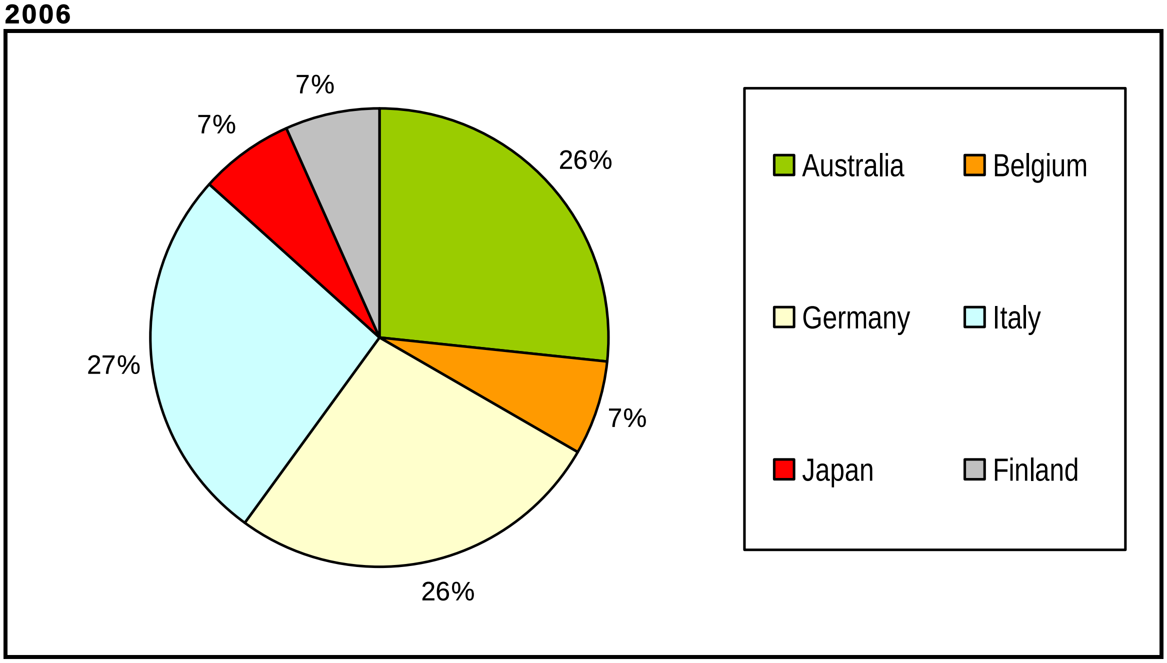
Figure 6: Origin of American visitors to the Dryden Travel Information Centre, 2003 to 2006



Source: Dryden Travel Information Centre

Of the few foreign guests to the Dryden Visitor Information Centre, the majority originated from Germany, Australia and Italy.

Figure 7: Origin of overseas visitors to the Dryden Travel Information Centre, 2003 to 2006



Source: Dryden Travel Information Centre

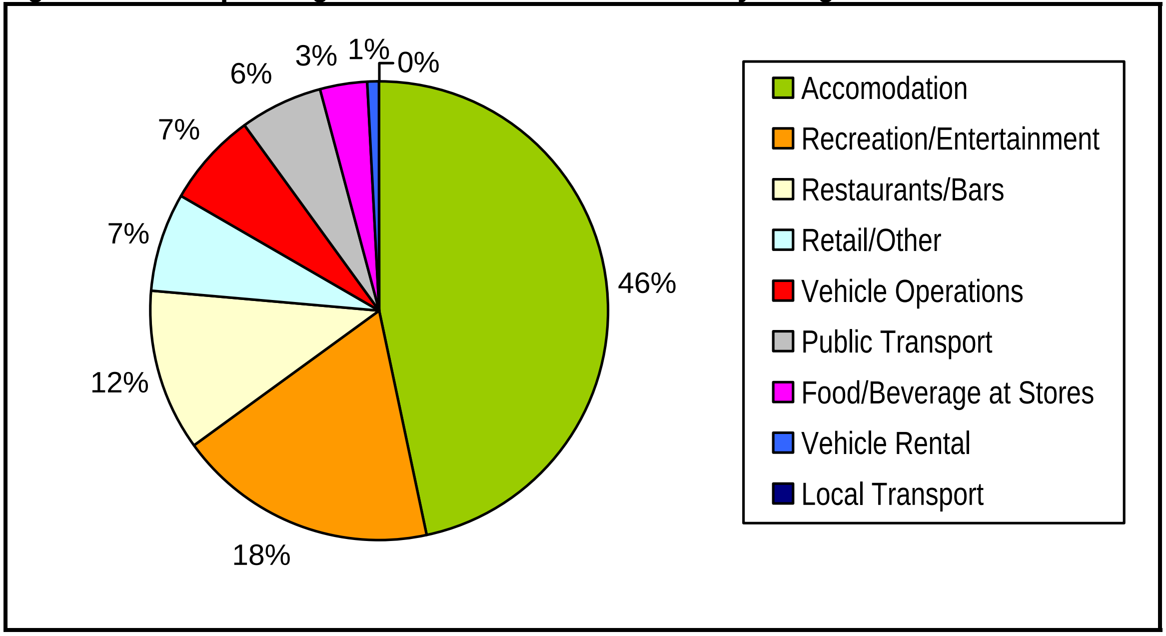
1.2. Total Spending

Based on the information provided by Ministry of Tourism in the Regional Tourism Profile report for the Kenora District, 2006:

- In 2006, Northwest Ontario had the third highest U.S. visitor spending total in all of Ontario at $304 million dollars. Toronto region was at $1,357 million, followed by Niagara at $453 million.
- Overseas visitors spent the least in Northwest Ontario compared to other locations in the province at $3 million from an overall provincial total of $2,519 million. This weak number can be attributed to the low volume of overseas visitors to the region as well as to the high proportion who came to visit friends and relatives.
- During the same year, visitors spent $173,224,768 in Kenora District which generated:
  - $141,008,000 in direct, indirect and induced contributions to gross domestic product (GDP);
  - $85,291,000 of labour income and salaries;
  - 2,463 part-time, full-time and seasonal jobs.
- Total taxes generated as a result of visitor spending in Kenora District reached $77,827,000 including $1,328,000 in municipal taxes that accrue for Kenora District.
- In 2006, the average spending by overnight visitors to Kenora District was approximately $107 per person.

The following graph displays the allocation of visitor spending.

Figure 8: Total spending of visitors to Kenora District by categories



Source: Ontario Ministry of Tourism: Regional Tourism Profiles, Kenora District, 2006

1.3. Demographic Profile

Profile of Canadian travellers to Northern Ontario[2]:

- Have higher incomes compared to other Canadian travellers;
- Generally are slightly younger than other Canadian travellers;
- Live mainly with a spouse or partner without young children;
- Foreign-born Ontario residents are less likely to visit Northern Ontario than those who were born in Canada[3].

Profile of American travellers to Northern Ontario[4]:

- Have higher incomes compared to other American travellers;
- Are older couples (average age 48.3) without young children; 27.3% lived with children under 17;
- Are more educated than other American travellers.

The 2006 Regional Tourism Profile[5] for the Kenora District indicates that:

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[2] Source: TAMS Tourism Research Unit. (2007*). Canadian Travellers Who Visited Northern Ontario,* (Report No. June 2007). Ontario Ministry of Tourism

[3] Below-average levels of interest in outdoor activities were expressed in foreign-born Ontario residents

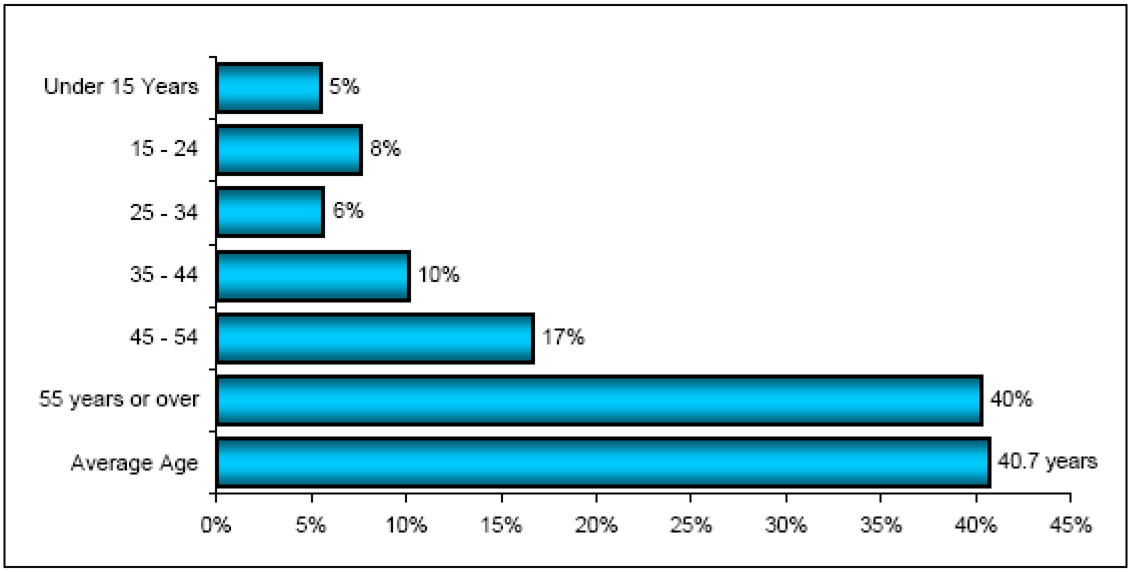
[4] Source: TAMS Tourism Research Unit. (2007*). U.S. Travellers Who Visited Northern Ontario,* (Report No. February 2007). Ontario Ministry of Tourism

[5] Retrieved from http://www.tourism.gov.on.ca/english/research/rtp/index.html

- 86% of the overnight visitors to Kenora District were travelling in adult-only parties and the remaining 14% were travelling with at least one individual fifteen years of age or younger;
- The average party size for all overnight visitors was 3.4 (including children).

The following figure reveals that a majority of travellers to the Kenora District are 55 years or over.

Figure 9: Average age of overnight visitors to Kenora District



Source: Ontario Ministry of Tourism. Regional Tourism Profiles, Kenora District, 2006

1.4. Preferences

In this section, the travel behaviors and motivations of both American and Canadian travellers are examined.

Profile of Canadian travellers to Northern Ontario[6]:

- Seek undiscovered and less built up destinations;
- Seek more solitude and isolation than other Canadian travellers[7]. In fact, the remoteness of the North was an influential factor in their travel decisions;
- Seek to be more physically challenged than other Canadian travellers;
- Have a strong relationship with outdoor recreation activities, particularly camping and fresh water fishing;
- Their primary reasons for travelling to Northern Ontario were fishing and to seek undiscovered, less built up places;

[6] Source: TAMS Tourism Research Unit. (2007*). Canadian Travellers Who Visited Northern Ontario,* (Report No. June 2007). Ontario Ministry of Tourism

[7] "Other Canadian travellers" signifies Canadian travellers to other destinations within or outside of Canada.

- Are not travelling to be pampered or stay in luxury accommodation.

Profile of American travellers to Northern Ontario[8]:

- More active than other American travellers[9];
- Seek undiscovered and less built up destinations;
- More sensitive to costs than other American travellers;
- Are not travelling to be pampered or stay in luxury accommodation. (only 11.1% indicated that luxury accommodation was highly important);
- 49.2% of US travellers to Northern Ontario indicated that “having lots of things for adults to see and do” was highly important in their considerations for a travel destination, while 58.6% indicated that “having lots of things for children to see and do” was of no importance;
- Of the most frequently mentioned activities there are a number which relate to the natural environment. Many listed specialized nature-based activities (mainly fresh water fishing, viewing flora and fauna, hunting and visiting nature parks) as the main reasons for taking a trip.

The following figure demonstrates the number of Canadian and American travellers to Northern Ontario who engaged in a specific activity while on an overnight trip between 2004 and 2005. For each key outdoor activity listed, more Canadian travellers engaged in the activity than American travellers, including in the categories of fishing and hunting.

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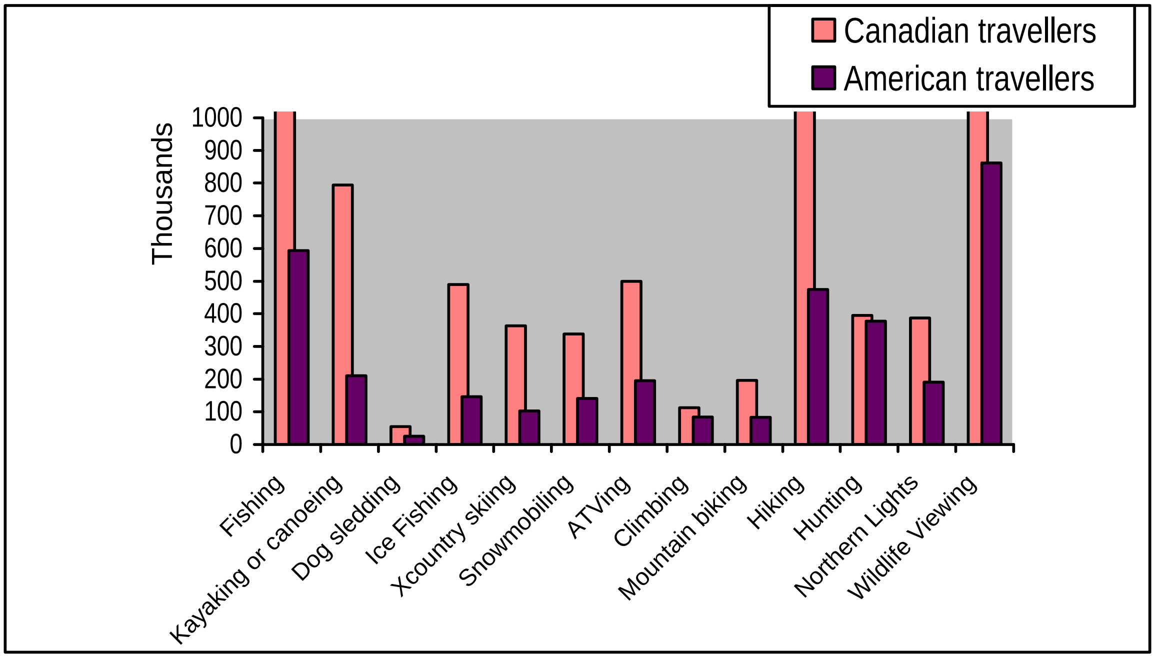
[8] Source: TAMS Tourism Research Unit. (2007*). U.S. Travellers Who Visited Northern Ontario,* (Report No. February 2007). Ontario Ministry of Tourism

[9] “Other American travellers” signifies American travellers to other destinations within or outside of Canada.

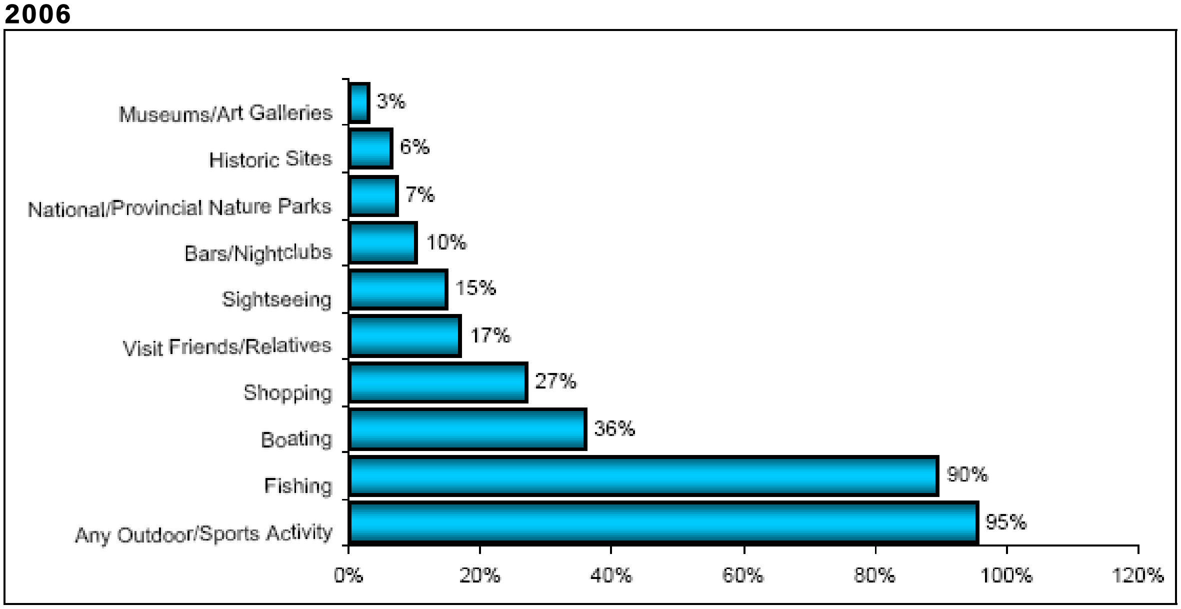
Figure 10: Number of travellers to Northern Ontario who participated in key activity types while on trips between 2004 and 2005



Source: TAMS, *Canadian Travellers Who Visited Northern Ontario*, June 2007. TAMS, *U.S. Travellers Who Visited Northern Ontario*, February 2007

The figure below reveals that in 2006, 95% of visitors to the Kenora District engaged in some type of outdoor/sports activity during their stay; most fished.

Figure 11: Top 10 trip-activities engaged in by overnight visitors to Kenora District 2006



Source: Ontario Ministry of Tourism: Regional Tourism Profiles, Kenora District, 2006

2. Profile of Travellers Who Participated in Outdoor Activities

It is clear that a majority of travellers to Northern Ontario engage in one or more outdoor activities while on trips. This section will look more closely at the profile of travellers who choose to participate in an outdoor activity while vacationing.

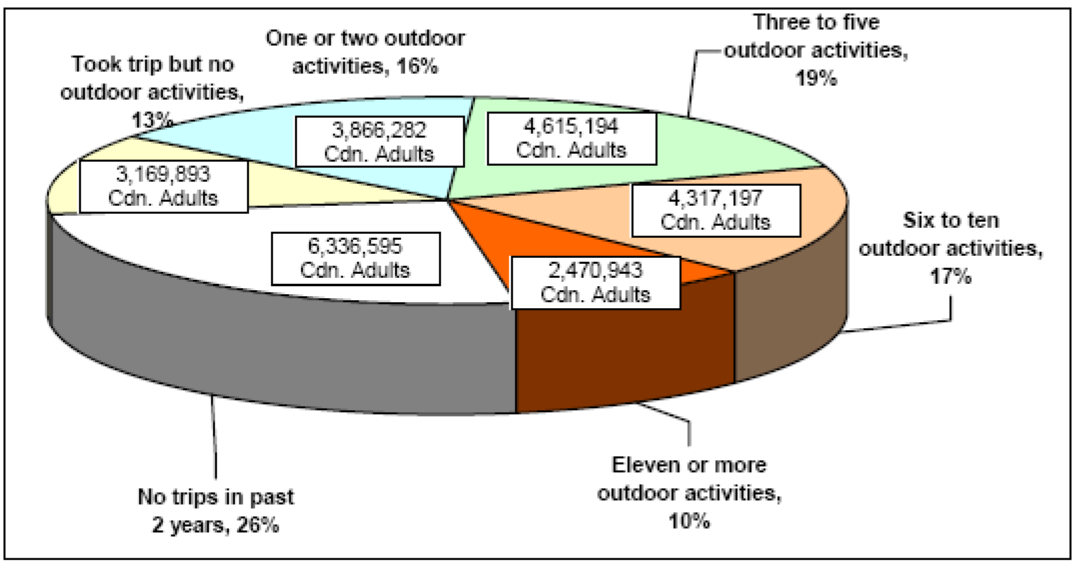
2.1. Market Size

In the 2006 TAMS survey, 82.8% of Canadian pleasure travellers indicated that they participated in at least one outdoor activity while on trips of one or more nights in the previous two years.

It is estimated that 46% of Canadian pleasure travellers participated in 3 or more outdoor activities while on trips. Slightly less of a percentage of American travellers (37%) participated in 3 or more outdoor activities while on trips, although the market size is much greater, representing close to 83 million pleasure travellers in total.

The following pie chart illustrates the Canadian market by level of participation in outdoor activities.

Figure 12: Incidence of outdoor activities of Canadian pleasure travellers while on trips

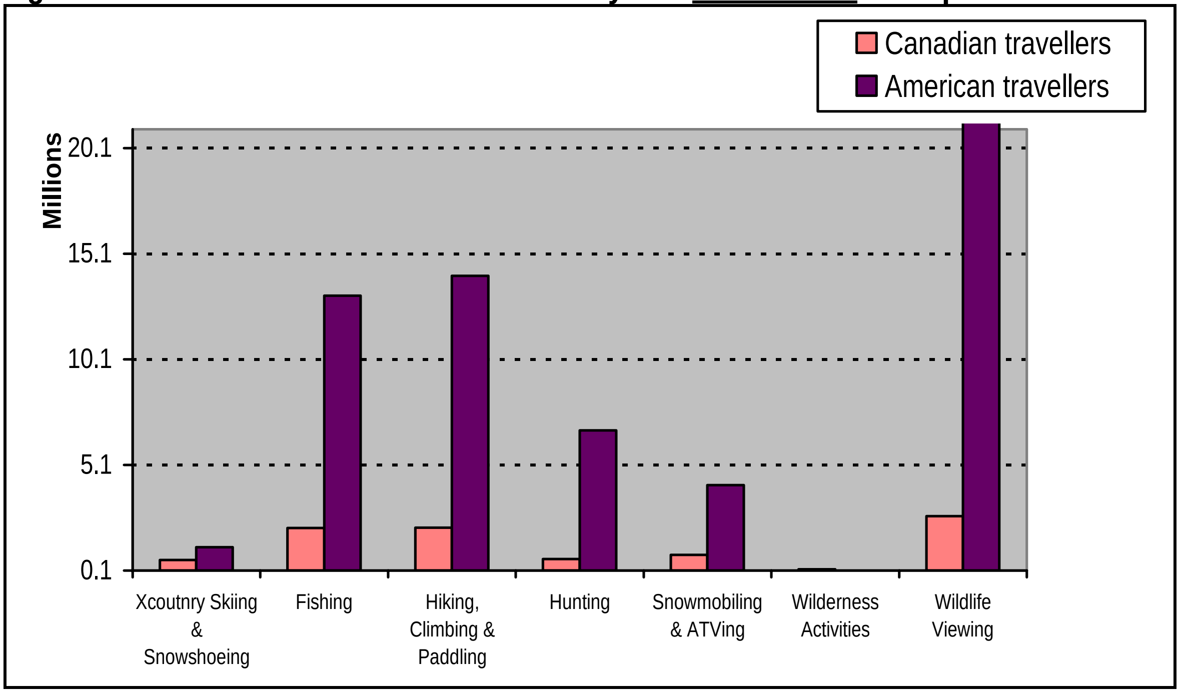


Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

As demonstrated in the following figure, for both Canadian and American travellers, the most common outdoor activity type (available in Northwest Ontario) identified as the "main" reason for taking a trip in the last two years, was Wildlife Viewing followed by Fishing, and Hikers, Climbers & Paddlers.

Please note that the survey defines Wilderness Activities to include wilderness skills course, dog sledding, and ice climbing.

Figure 13: Number of travellers where activity was <u>main reason</u> for trip[10]

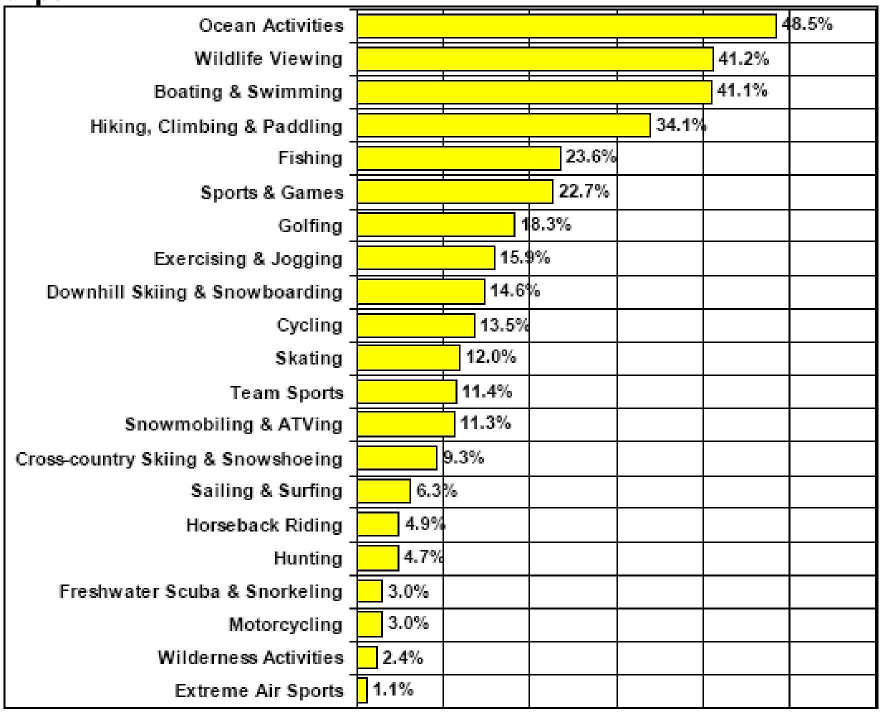


Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007. TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

The following two figures show us the percentage of travellers who participated in each outdoor activity type while on trips in the last two years. It is important to note that a large percentage of outdoor travellers participated in more than one activity while on trips, therefore the smaller percentages such as Snowmobiling and ATVing, Hunting, and Wilderness Activities should not be overlooked.

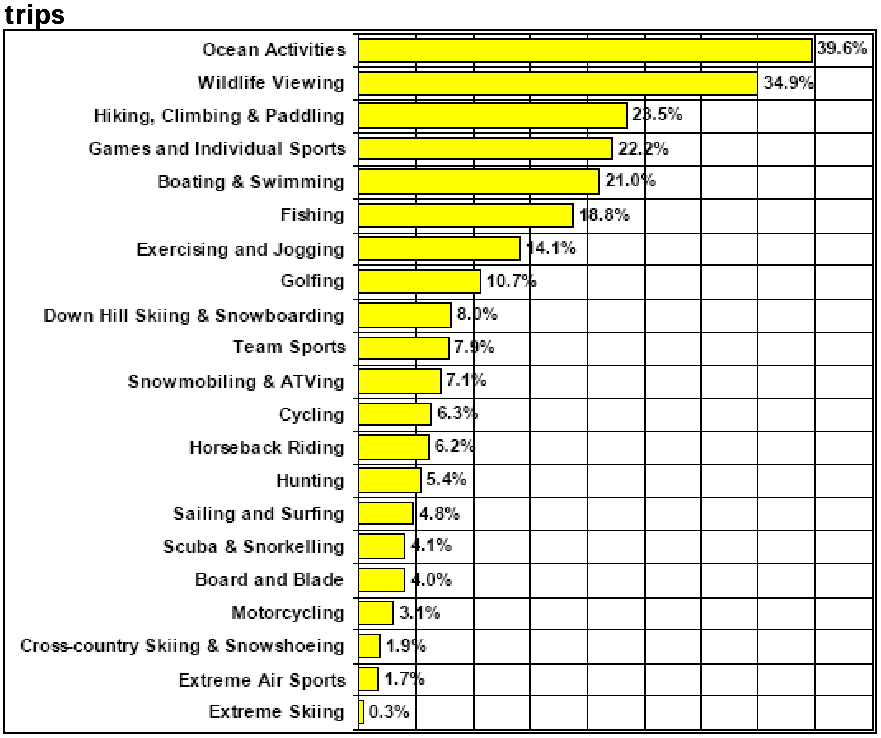
[10] 'Trips are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights'. Definition retrieved from: http://www.tourism.gov.on.ca/english/research/travel_activities/CDN_TAMS_2006_Wildlife_Viewing_Oct2007.pdf.

Figure 14: Percentage of Canadians participating in each outdoor activity while on trips



Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

Figure 15: Percentage of Americans participating in each outdoor activity while on trips



Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007

Similar types of individuals participated in similar activities, as indexing each activity type demonstrates. In the following tables, we can see that the travellers by specific activity type tend to enjoy the same variety of activities.

When looking at the specific types of outdoor travellers indicated in the two tables below, the most common over-indexed[11] activities were: Horseback Riding, Cross-country Skiing & Snowshoeing, Skating or Board and Blade[12], and Cycling. What is interesting to note is that many of the over-indexed activities are (or can be) winter activities.

Table 3: Other over-indexed outdoor activities undertaken by Canadians while on trips by outdoor activity type

Outdoor Activity Type	Most Over-Indexed	Second Most Over-Indexed	Third Most Over-Indexed
Hunting	Snowmobiling & ATVing	Fishing	Cross-country Skiing & Snowshoeing
Fishing	Hunting	Snowmobiling & ATVing	Boating & Swimming
Wildlife Viewing	Horseback Riding	Hiking, Climbing & Paddling	Cross-country Skiing & Snowshoeing
Hiking, Climbing & Paddling	Cross-country Skiing & Snowshoeing	Cycling	Horseback Riding
Boating & Swimming	Skating	Sailing & Surfing	Cross-country Skiing & Snowshoeing
Snowmobiling & ATVing	Hunting	Fishing	Horseback Riding
Cross-country Skiing & Snowshoeing	Skating	Cycling	Downhill Skiing & Snowboarding
Wilderness Activities	Cross-country Skiing & Snowshoeing	Hunting	Horseback Riding

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

Table 4: Other over-indexed outdoor activities undertaken by Americans while on trips by outdoor activity type

Outdoor Activity Type	Most Over Indexed	Second Most Over-Indexed	Third Most Over-Indexed
Hunting	Snowmobiling & ATVing	Fishing	Motorcycling
Fishing	Hunting	Snowmobiling & ATVing	Boating & Swimming
Wildlife Viewing	Hiking, Climbing & Paddling	Cycling	Horseback Riding
Hiking, Climbing & Paddling	Cycling	Horseback Riding	Board and Blade
Boating & Swimming	Board and Blade	Sailing and Surfing	Cycling
Snowmobiling & ATVing	Hunting	Motorcycling	Board and Blade
Cross-country Skiing & Snowshoeing	Downhill Skiing & Snowboarding	Cycling	Board and Blade

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007

[11] Over-indexed or highly indexed signifies that a greater percentage, compared to the average Pleasure Traveller, selected that specific outdoor activity. For example, more travellers who engaged in hunting while on a trip selected Snowmobiling & ATVing as another outdoor activity participated in while on a trip.
[12] Board and Blade includes ice skating, inline skating, and skateboarding.

2.2. Other Tourism Activities

The following tables reveal the increasing number of cultural activities engaged in based on the level of participation in outdoor activities. The high participation rate in cultural activities by travellers who engaged in 6 or more outdoor activities could be explained by various factors such as a greater disposable income, increased mobility, high physical energy, or more available time.

Nonetheless, it is apparent that travellers who participated in one or more outdoor activity were likely to engage in more cultural activities than those who did not participate in any outdoor activity while on trips in the previous two years.

Table 5: Percentage of culture and entertainment activities in relation to the number of outdoor activities pursued by Canadians while on trips

	Took a pleasure trip but no outdoor activities	Participated in one or two outdoor activities	Participated in three to five outdoor activities	Participated in six or more outdoor activities
Size of Market	3,169,893	3,866,282	4,615,194	6,788,140
Shopping & Dining	67.5%	76.7%	85.9%	91.5%
Historical Sites, Museums & Art Galleries	37.0%	46.7%	58.6%	74.6%
Fairs & Festivals	16.0%	24.4%	35.6%	56.8%
Musical Concerts, Festivals & Attractions	12.4%	20.3%	31.2%	50.4%
Wine, Beer & Food Tastings	12.0%	15.7%	20.9%	35.9%
Live Theatre	10.5%	16.0%	19.8%	29.8%
Agro-Tourism	7.2%	9.4%	14.6%	24.0%
Aboriginal Cultural Experiences	3.0%	5.1%	8.6%	21.3%
Spas	3.0%	4.8%	8.8%	17.2%
Participatory Historical Activities	1.5%	3.0%	4.8%	12.5%

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

Table 6: Percentage of culture and entertainment activities in relation to the number of outdoor activities pursued by Americans while on trips

	Took a pleasure trip but no outdoor activities	Participated in one to two outdoor activities	Participated in three to five outdoor activities	Participated in six or more outdoor activities
Size of Market	43,251,588	44,896,863	41,838,572	40,523,218
Shopping and Dining	62.2%	73.3%	84.4%	92.2%
Historical Sites, Museums & Art Galleries	34.1%	45.9%	59.8%	76.0%
Fairs and Festivals	19.5%	31.9%	46.5%	68.2%
Fine Dining and Spas	19.5%	26.2%	35.9%	51.8%
Wine, Beer and Food Tastings	11.3%	16.4%	24.8%	40.6%
Rock Concerts and Recreational Dancing	6.7%	9.6%	15.6%	30.3%
Agro-Tourism	5.5%	9.1%	13.3%	27.3%
Aboriginal Cultural experiences	2.5%	4.8%	8.6%	19.2%
Archaeological Digs & Sites	1.7%	3.2%	5.5%	12.1%
Participatory Historical Activities	1.1%	2.0%	3.8%	9.2%

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007

The following two tables illustrate similar preferences for certain cultural activities amongst outdoor enthusiasts with some slight differences between American and Canadian travellers.

Based on this information, one could assume that any tourism product based on the following would be a popular secondary tourism activity for outdoor traveller types:

1. Participatory Historical Activities
2. Literary & Film Festivals
3. Aboriginal Cultural Experiences
4. Amateur Tournaments
5. Equestrian & Western Events.

Table 7: Culture and entertainment activities undertaken by Canadian travellers by outdoor activity type

Outdoor Activity Type	Most Over-Indexed	Second Most Over-Indexed	Third Most Over-Indexed
Golfing	Professional Sporting Events	National & Int'l Sporting Events	Amateur Tournaments
Hunting	National & Int'l Sporting Events	Agro-Tourism	Professional Sporting Events
Fishing	National & Int'l Sporting Events	Amateur Tournaments	Equestrian & Western Events
Wildlife Viewing	Participatory Historical Activities	Aboriginal Cultural Experiences	Literary & Film Festivals
Hiking, Climbing & Paddling	Participatory Historical Activities	Aboriginal Cultural Experiences	Literary & Film Festivals
Boating & Swimming	Amateur Tournaments	Aboriginal Cultural Experiences	Literary & Film Festivals
Snowmobiling & ATVing	Comedy Festivals & Clubs	Equestrian & Western Events	Literary & Film Festivals
Cross-country Skiing & Snowshoeing	Literary & Film Festivals	Participatory Historical Activities	High Art Performances
Wilderness Activities	Participatory Historical Activities	Literary & Film Festivals	Aboriginal Cultural Experiences

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

Table 8: Culture and entertainment activities undertaken by American travellers by outdoor activity type

Outdoor Activity Type	Most Over-Indexed	Second Most Over-Indexed	Third Most Over-Indexed
Golfing	Professional Sporting Events	Amateur Tournaments	Wine, Beer and Food Tastings
Hunting	Equestrian & Western Events	Amateur Tournaments	Agro-Tourism
Fishing	Equestrian & Western Events	Participatory Historical Activities	Amateur Tournaments
Wildlife Viewing	Participatory Historical Activities	Aboriginal Cultural experiences	Archaeological Digs & Sites
Hiking, Climbing & Paddling	Archaeological Digs & Sites	Participatory Historical Activities	Aboriginal Cultural experiences
Boating & Swimming	Participatory Historical Activities	Agro-Tourism	Theatre, Film & Musical Festivals
Snowmobiling & ATVing	Equestrian & Western Events	Amateur Tournaments	Agro-Tourism
Cross-country Skiing & Snowshoeing	Participatory Historical Activities	Aboriginal Cultural experiences	Archaeological Digs & Sites

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007

When examining the preferred tours of outdoor activity travellers, it is evident that Wilderness Tour is a popular choice followed by a Sightseeing Cruise.

The Tour of Winery activity can signify a general interest in culinary tourism activities such as an artisan food producer's tour.

Based on the following two tables, it would be safe to assume that any tourism products founded on the following would be popular secondary tourism activities for outdoor travellers:

1. Wilderness Tour
2. Sightseeing Cruise
3. Culinary Tour

Table 9: Most popular tours and cruises by outdoor activity type – Canadian travellers

Outdoor Activity Type	Most Over-Indexed	Second Most Over-Indexed	Third Most Over-Indexed
Hunting	Wilderness tour	Sightseeing cruise	Scenic countryside drive
Fishing	Wilderness tour	Tour of a casino	Sightseeing cruise
Wildlife Viewing	Wilderness tour	Sightseeing cruise	A self-guided multi-location tour
Hiking, Climbing & Paddling	Wilderness tour	Tour of a winery	A self-guided multi-location tour
Boating & Swimming	Wilderness tour	Sightseeing cruise	Tour of a winery
Horseback Riding	Wilderness tour	Sightseeing cruise	Tour of a winery
Snowmobiling & ATVing	Wilderness tour	Sightseeing cruise	Tour of a casino
Cross-country Skiing & Snowshoeing	Wilderness tour	Tour of a winery	A self-guided multi-location tour
Wilderness Activities	Wilderness tour	Tour of a winery	A multi-location multi-day guided tour

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

Table 10: Most popular tours and cruises by outdoor activity type – American travellers

Outdoor Activity Type	Most Over-Indexed	Second Most Over-Indexed	Third Most Over-Indexed
Hunting	Wilderness tour	A self-guided multi-location tour	Tour of a casino
Fishing	Wilderness tour	Tour of a casino	Tour of winery
Wildlife Viewing	Wilderness tour	Alaskan ocean cruise	Country-side scenic drives
Hiking, Climbing & Paddling	Wilderness tour	Tour of winery	A self-guided multi-tour location
Boating & Swimming	Wilderness tour	Tour of winery	A self-guided multi-tour location
Snowmobiling & ATVing	Wilderness tour	Alaskan ocean cruise	Tour of a casino
Cross-country Skiing & Snowshoeing	Tour of winery	Wilderness tour	Alaskan ocean cruise

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007

2.3. Demographic Profile

The average U.S. pleasure traveller's household income is $74,303. The average Canadian pleasure traveller's household income $72,829.

For Canadian travellers who participated in 3 to 5 outdoor activities while on trips, the average household income in 2006 was $73,884. American travellers of the same group had an average household income of $78,796 – higher than the average American pleasure traveller.

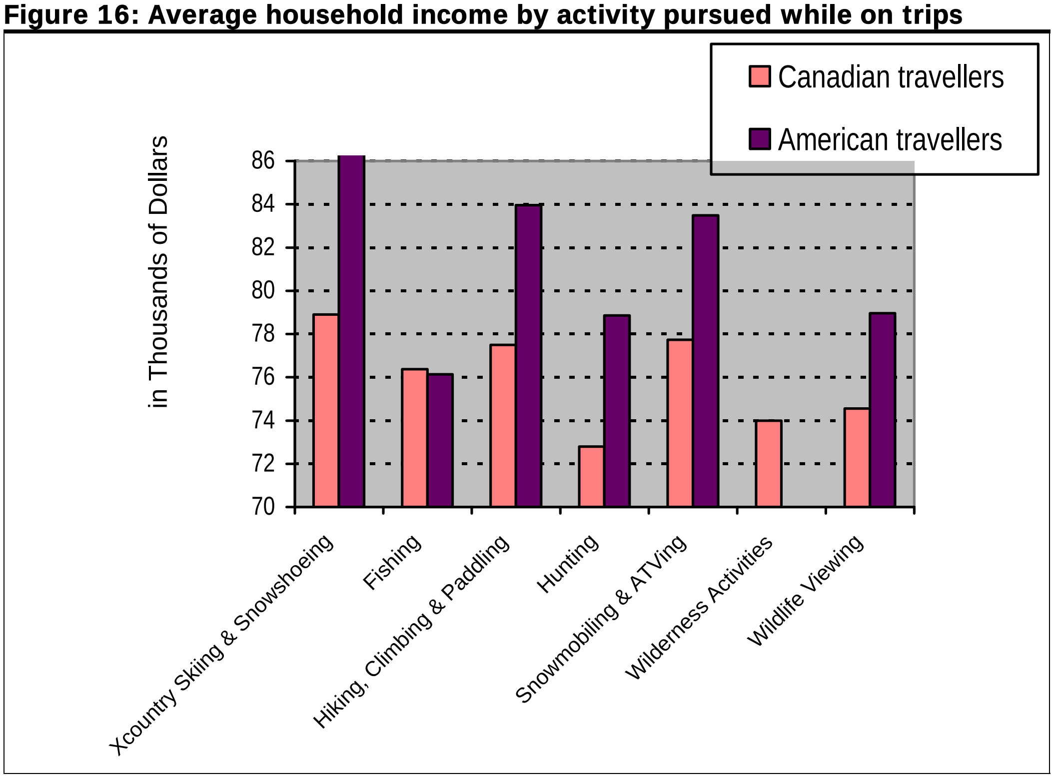
Canadian travellers of 6 or more outdoor activities have an average household income of $80,914 – significantly higher than the average pleasure traveller. American travellers who participated in 6 or more outdoor activities while on trips have an average household income of $89,734 – significantly higher than the average U.S. pleasure traveller.

For all outdoor activity types listed in the figure below, the household income is higher than the average pleasure traveller, particularly for cross-country skiers and those engaged in Hiking, Climbing and Paddling while travelling.

American travellers, as is apparent in the figure below, have significantly higher household incomes compared to Canadians, with the exception of anglers, where Canadian anglers have a slightly higher household income than American anglers.

Canadians engaged in hunting while on a trip have the lowest household income of all outdoor activity types listed above.

Figure 16: Average household income by activity pursued while on trips



Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007. TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

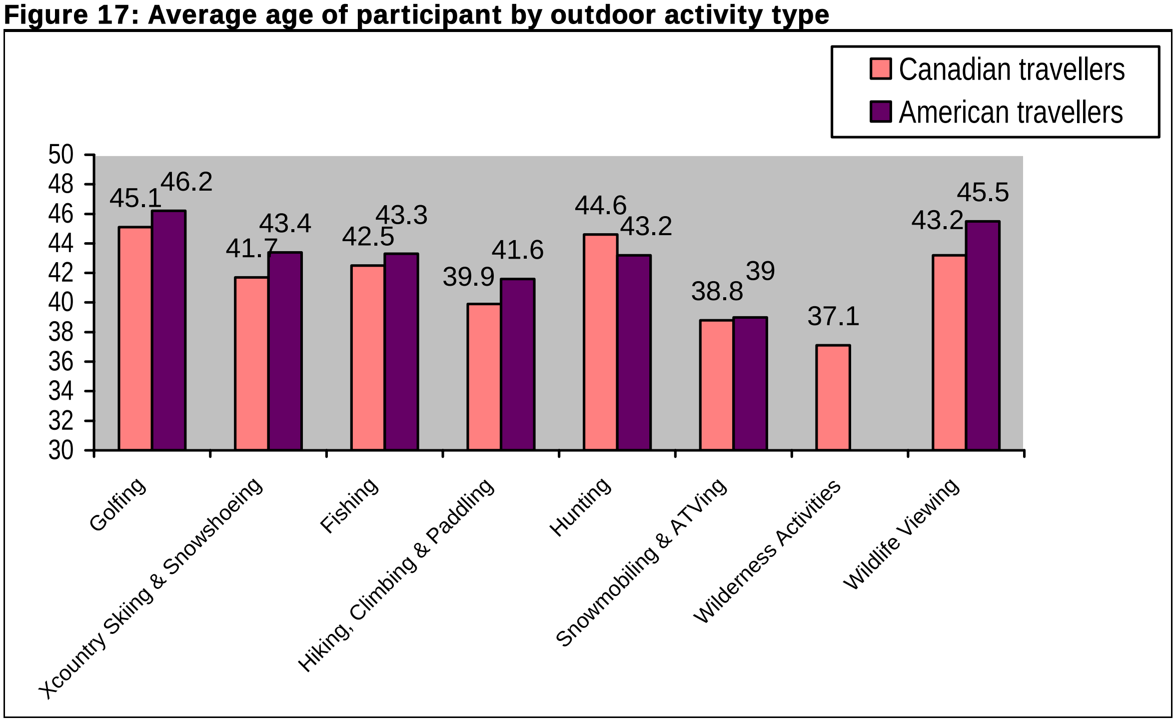
The average age of Canadian travellers participating in 3 to 5 outdoor activities is 44.5. Women represent a higher percentage than men in this group. 70% have no children under 18. A higher percentage of travellers in this group have a high school education or less (34.4%) compared to those with University degrees (31.1%).

American travellers who participated in 3 to 5 outdoor activities while on trips are on average 44 years of age with slightly more females than males. 67% have no children under 18. A large percentage of travellers have a University degree (42.7%).

For participants of 6 or more outdoor activities while on trips in the past two years, the average age is younger at 33.9 for Canadians and 41.5 for Americans. Males have a higher representation in this group. 67.4% of Canadian travellers and 66.2% Americans have no children under 18. More travellers in this group have a University degree at 36.1% for Canadians and 45.7% of Americans.

When examining the average age of specific outdoor traveller types, the youngest group – Wilderness Activities – is on average 37 years old. Most other outdoor activity types hover between 39 and 46 average years of age.

Figure 17: Average age of participant by outdoor activity type



Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007. TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

In the following two tables, the top three percentages for each outdoor activity group are bolded. These figures illustrate the following:

- For both nationalities, Mature Families appears to be the larger segment in many of the specific outdoor activity markets;
- There are more American outdoor travellers belonging to the Older Couples lifecycle stage than there are Canadians;

- Canadian Young Families and Young Couples are segments of importance in many outdoor activities compared to Americans.

As confirmed in the figure above, overall we can conclude that Canadian outdoor travellers in general are slightly younger in age and are likely to have younger children than American outdoor travellers.

Table 11: Percent of Canadian participants for each outdoor activity type by lifecycle stage[13]

	Young Singles	Young Couples	Young Families	Mature Families	Middle Aged Couples	Middle Aged Singles	Older Couples	Older Singles
Size of Market	2,709,017	1,698,434	1,509,892	3,818,654	3,039,316	958,802	3,665,934	1,039,460
Golfing	13.7%	**20.6%**	16.6%	**20.1%**	19.8%	15.8%	**20.9%**	11.4%
Hunting	2.6%	5.5%	**5.8%**	4.5%	**6.0%**	**6.0%**	4.9%	2.5%
Fishing	22.5%	**27.1%**	**25.7%**	**28.3%**	25.0%	22.3%	19.6%	12.1%
Wildlife Viewing	42.1%	**47.7%**	**43.4%**	**44.8%**	41.7%	40.0%	35.8%	31.2%
Hiking, Climbing & Paddling	**46.2%**	**49.2%**	34.3%	**37.1%**	32.5%	36.4%	19.9%	18.6%
Snowmobiling & ATVing	14.1%	15.3%	**16.6%**	11.3%	13.0%	11.1%	6.1%	3.8%
Cross-country Skiing & Snowshoeing	**11.5%**	**13.6%**	6.5%	**9.6%**	**9.6%**	**9.5%**	6.9%	6.9%
Wilderness Activities	**4.6%**	**3.8%**	2.0%	2.1%	1.7%	**4.6%**	0.8%	1.0%

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

13 Young refers to persons 18 to 34; Middle-Aged refers to persons 35 to 54; Older refers to persons 55 and older. Young Families have children 12 and younger living at home; Mature Families have children 13 to 18 living at home with no children under the age of 12. Couples are individuals who are married or living common-law with their partner.

Table 12: Percent of American participants for each outdoor activity type by lifecycle stage[14]

	Young Singles	Young Couples	Young Families	Mature Families	Middle Aged Couples	Middle Aged Singles	Older Couples	Older Singles
Size of Market	21,626,811	11,892,723	22,528,662	30,846,718	24,989,990	9,786,569	34,451,018	14,387,749
Golfing	11.4%	7.2%	11.4%	**19.0%**	**16.6%**	4.5%	**25.3%**	4.7%
Hunting	10.9%	7.2%	**17.2%**	**20.7%**	16.9%	4.2%	**19.3%**	3.5%
Fishing	12.2%	7.2%	15.4%	**21.9%**	**15.5%**	4.9%	**18.5%**	4.3%
Wildlife Viewing	10.7%	7.8%	13.3%	**18.6%**	**16.1%**	5.5%	**20.9%**	7.2%
Hiking, Climbing & Paddling	**15.9%**	10.0%	13.1%	**20.9%**	**15.6%**	5.7%	14.2%	4.6%
Boating & Swimming	**15.1%**	8.4%	**16.0%**	**23.7%**	14.6%	4.7%	13.2%	4.2%
Snowmobiling & ATVing	**17.5%**	11.2%	15.5%	**20.8%**	**15.9%**	4.5%	11.5%	3.2%
Cross-country Skiing & Snowshoeing	15.6%	10.2%	8.1%	**19.2%**	**17.9%**	5.5%	**18.9%**	4.6%

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007

2.4. Preferences

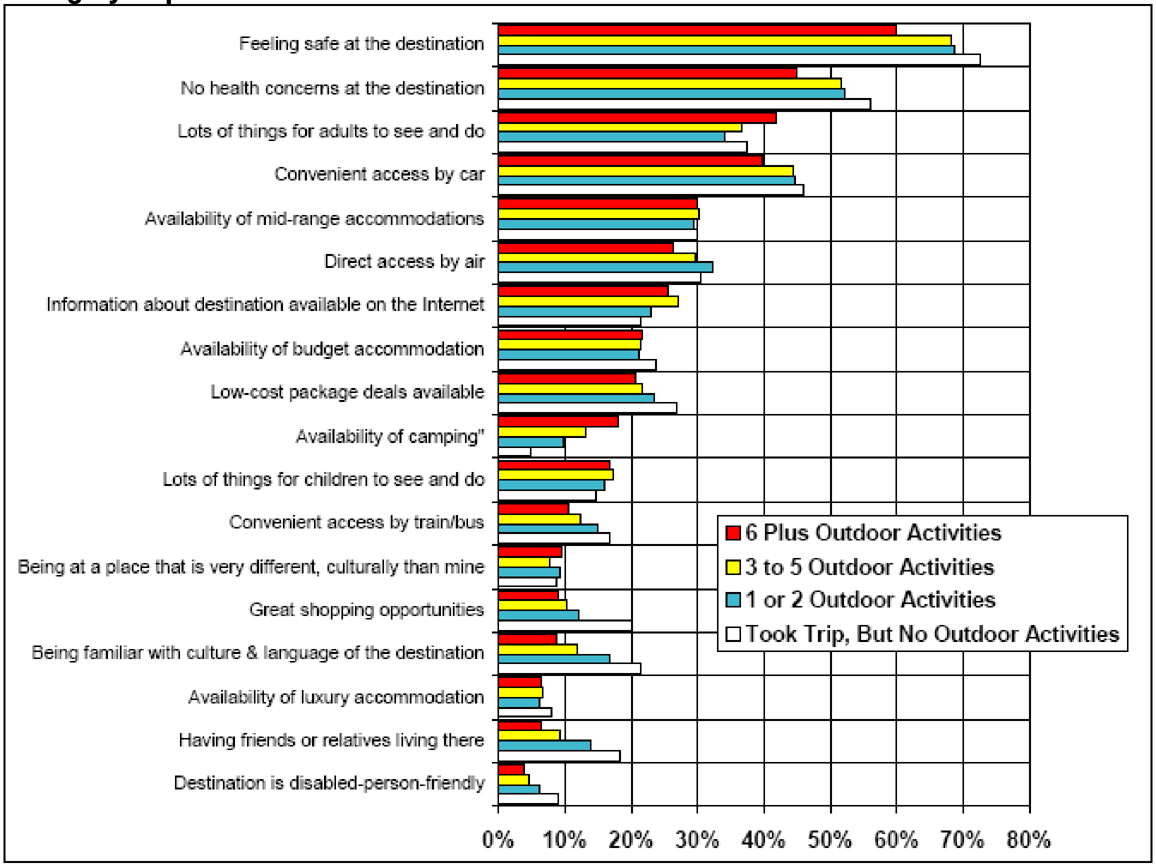
For Canadian travellers who participated in 6 or more outdoor activities while on trips in the last two years, cost and convenient access was <u>less</u> important than for travellers who participated in fewer outdoor activities.

As the following figure illustrates, attributes that were significantly more important to participants of several outdoor activities compared to travellers who did no outdoor activities while on trips included:

- Lots of things for adults to see and do
- Information available on the internet
- Availability of camping
- Lots of things for children to see and do
- Being at a place that is very different culturally.

[14] Young refers to persons 18 to 34; Middle-Aged refers to persons 35 to 54; Older refers to persons 55 and older. Young Families have children 12 and younger living at home; Mature Families have children 13 to 18 living at home with no children under the age of 12. Couples are individuals who are married or living common-law with their partner.

Figure 18: The percentage of Canadian travellers that rated each destination attribute as highly important



Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

As the next table illustrates, if we examine the attributes of importance that had a higher incidence of selection by specific outdoor travellers, we see commonalities. The most common attributes are:

1. Availability of camping
2. Different culturally than home
3. Lots of things for adults to see and do
4. Lots of things for children to see and do.

An interesting observation is the importance of familiar culture and language to hunters of both nationalities.

In contrast to the popularity of camping, the availability of luxury accommodation was a common important attribute for golfers and American snowmobilers and ATVers.

Table 13: Attributes of destinations considered important by outdoor activity types – Canadian travellers

Outdoor Activity Type	Most Over-Indexed	Second Most Over-Indexed	Third Most Over-Indexed
Golfing	Availability of luxury accommodation	Availability of mid-range accommodation	Direct access by air
Hunting	Availability of camping	Familiar culture & language	Convenient access by car
Fishing	Availability of camping	Lots of things for children to see and do	Convenient access by car
Wildlife Viewing	Availability of camping	Different culturally than home	Lots of things for adults to see and do
Hiking, Climbing & Paddling	Availability of camping	Availability of budget accommodations	Different culturally than home
Boating & Swimming	Availability of camping	Lots of things for children to see and do	Lots of things for adults to see and do
Snowmobiling & ATVing	Availability of camping	Lots of things for children to see and do	Lots of things for adults to see and do
Downhill Skiing & Snowboarding	Different culturally than home	Availability of camping	Lots of things for adults to see and do
Cross-country Skiing & Snowshoeing	Availability of camping	Different culturally than home	Lots of things for adults to see and do
Wilderness Activities	Availability of camping	Different culturally than home	Convenient access by train/bus

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

Table 14: Attributes of destinations considered important by outdoor activity types – American travellers

Outdoor Activity Type	Most Over-Indexed	Second Most Over-Indexed	Third Most Over-Indexed
Golfing	Availability of luxury accommodation	Direct access by air	Availability of mid-range accommodation
Hunting	Availability of camping	Lots of things for children to see and do	Familiar culture and language
Fishing	Availability of camping	Lots of things for children to see and do	Convenient access by car
Wildlife Viewing	Availability of camping	Different culturally than home	Lots of things for adults to see and do
Hiking, Climbing & Paddling	Availability of camping	Different culturally than home	Lots of things for adults to see and do
Boating & Swimming	Availability of camping	Lots of things for children to see and do	Lots of things for adults to see and do
Snowmobiling & ATVing	Availability of camping	Availability of luxury accommodation	Different culturally than home
Cross-country Skiing & Snowshoeing	Availability of camping	Different culturally than home	Convenient access by train/bus

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007

The following two figures illustrate the importance of various benefits sought out while on vacation. It is important to observe the differences between participants of several outdoor activities and those who did no outdoor activities while on trips. For both Canadian and American travellers, some of the "highly important" benefits that stand out as being more popular to participants of 6 or more outdoor activities compared to the participants of 2 or less outdoor activities are:

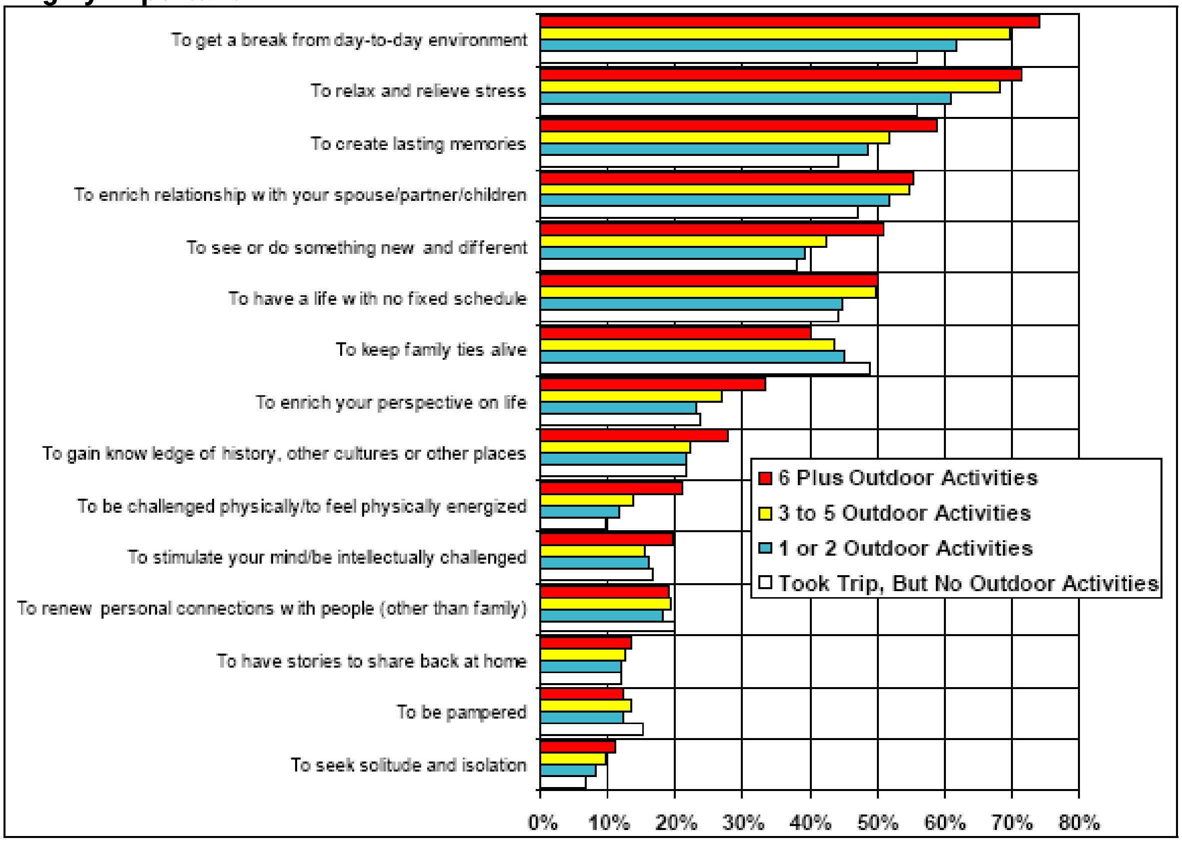
- To create lasting memories
- To enrich your relationship with your spouse/partner/children[15]
- To see or do something new and different
- To have a life with no fixed schedule
- To enrich your perspective on life
- To gain knowledge of history, other cultures or other places
- To be challenged physically
- To stimulate your mind/be intellectually challenged
- To seek solitude and isolation.

In contrast, a greater percentage of travellers who did not participate in outdoor activities were more interested than active outdoor travellers in the following benefits:

- To keep family ties
- To renew personal connections with people other than family
- To be pampered.

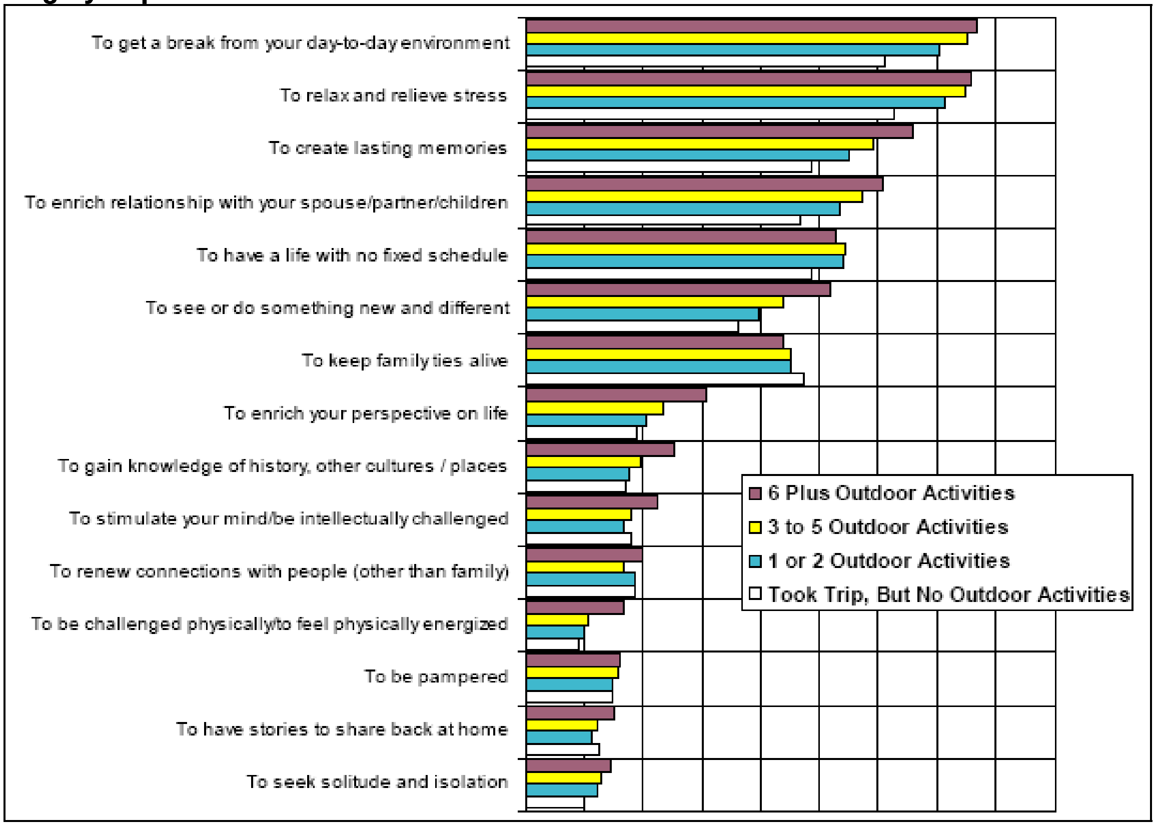
[15] For "no outdoor activity" travellers, enriching their relationships was more important than creating lasting memories. It is the opposite for highly active outdoor participants.

Figure 19: Percent of Canadian travellers that rated each benefit while on vacation as "highly important"



Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

Figure 20: Percent of American travellers that rated each benefit while on vacation as "highly important"



Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007

The next two tables illustrate the vacation benefits identified by specific outdoor traveller types that are above the norm when compared to the average response of pleasure travellers. The tables demonstrate the commonalities between various outdoor activity types that include:

1. To be challenged and energized physically
2. To seek solitude and isolation
3. To learn (gain knowledge/ enrich your perspective/ stimulate the mind)[16]
4. To have stories to share back at home.

[16] In this case, the categories were pooled together as they are very similar.

Table 15: Vacation benefits sought by Canadian travellers by outdoor activity types

Outdoor Activity Type	Most Over-Indexed	Second Most Over-Indexed	Third Most Over-Indexed
Golfing	To be challenged and energized physically	To enrich family relationships	To relax and relieve stress
Hunting	To seek solitude and isolation	To be challenged and energized physically	To live without a fixed schedule
Fishing	To seek solitude and isolation	To relax and relieve stress	To have stories to share back at home
Wildlife Viewing	To gain knowledge of history/cultures/places	To stimulate your mind	To enrich your perspective on life
Hiking, Climbing & Paddling	To be challenged and energized physically	To enrich your perspective on life	To gain knowledge of history/cultures/places
Boating & Swimming	To be challenged and energized physically	To seek solitude and isolation	To get a break from daily environment
Snowmobiling & ATVing	To seek solitude and isolation	To have stories to share back at home	To live without a fixed schedule
Cross-country Skiing & Snowshoeing	To be challenged and energized physically	To enrich your perspective on life	To stimulate your mind
Wilderness Activities	To be challenged and energized physically	To stimulate your mind	To have stories to share back at home

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

Table 16: Vacation benefits sought by American travellers by outdoor activity types

Outdoor Activity Type	Most Over-Indexed	Second Most Over-Indexed	Third Most Over-Indexed
Golfing	To be challenged and energized physically	To relax and relieve stress	To enrich family relationships
Hunting	To seek solitude and isolation	To be challenged and energized physically	To have stories to share back at home
Fishing	To seek solitude and isolation	To be challenged and energized physically	To have stories to share back at home
Wildlife Viewing	To gain knowledge of history/culture	To enrich your perspective on life	To stimulate your mind intellectually
Hiking, Climbing & Paddling	To be challenged and energized physically	To gain knowledge of history/culture	To enrich your perspective on life
Boating & Swimming	To be challenged and energized physically	To seek solitude and isolation	To have stories to share back at home
Snowmobiling & ATVing	To be challenged and energized physically	To have stories to share back at home	To seek solitude and isolation
Cross-country Skiing & Snowshoeing	To be challenged and energized physically	To gain knowledge of history/culture	To stimulate your mind intellectually

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007

The next two figures reveal the various accommodation types stayed in, while on trips in the last two years, by the level of participation in outdoor activities. The strongest segment of travellers who indicated staying at a fly-in wilderness lodge or drive-to wilderness lodge (highlighted in yellow) was those who participated in 6 or more outdoor activities. They are nearly two to four times greater than the segment of travellers who participated in 1 or 2 outdoor activities.

The higher percentages seen under the "Participated in six or more outdoor activities" is likely explained by a higher number of trips and/or duration of trip in the last two years. This segment, as described above, has an average household income significantly greater than the average pleasure traveller.

Figure 21: Accommodation type stayed in by Canadian travellers by the number of outdoor activities

	Took a pleasure trip but no outdoor activities	Participated in one or two outdoor activities	Participated in three to five outdoor activities	Participated in six or more outdoor activities
Size of Market	3,169,893	3,866,282	4,615,194	6,788,140
A Public Campground	6.4%	14.3%	23.4%	44.5%
Lakeside / Riverside Resort	8.4%	14.8%	21.2%	33.8%
A Private Campground	5.6%	11.2%	16.9%	30.6%
A Campsite in a Wilderness Setting	0.9%	3.9%	6.2%	16.4%
Wilderness Lodge You Can Drive to	0.6%	2.7%	5.3%	9.8%
Health Spa	2.1%	3.3%	5.7%	9.4%
Country Inn or Resort with Gourmet Restaurant	2.1%	3.7%	4.6%	7.6%
Motor home / RV	2.1%	3.1%	4.2%	6.6%
Farm or Guest Ranch	1.4%	1.5%	2.8%	4.9%
Remote or Fly-In Wilderness Lodge	0.1%	0.3%	1.5%	3.1%
Fly-In Wilderness Outpost	LT 0.1%	0.1%	0.4%	1.2%

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

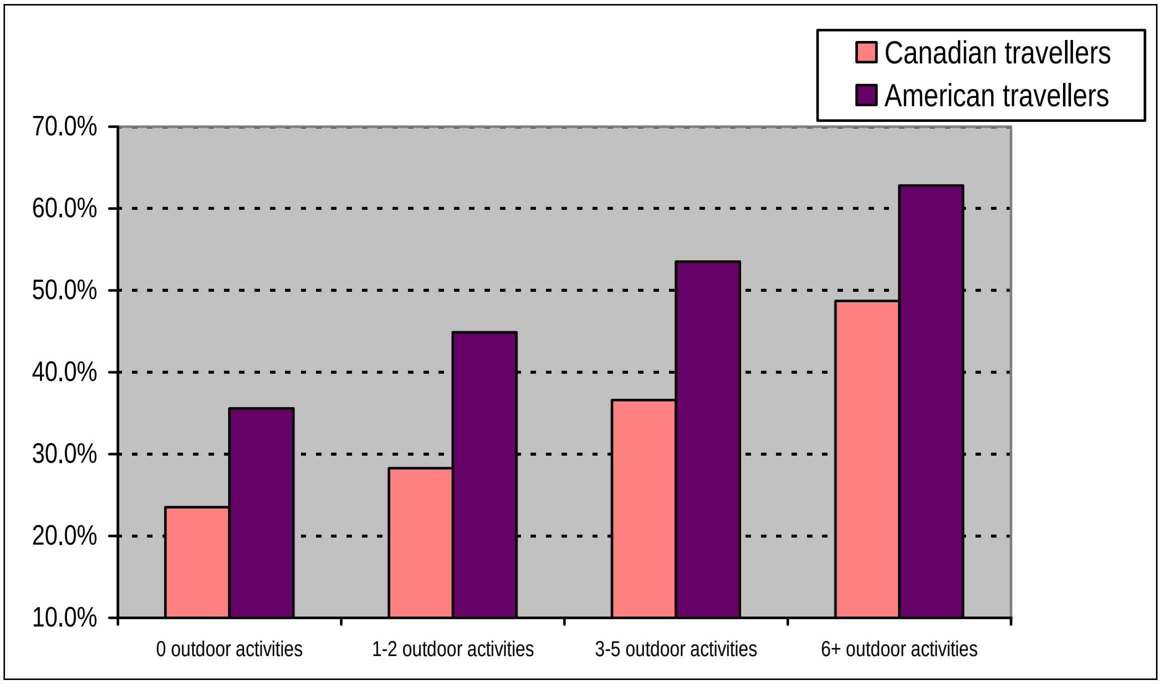
Figure 22: Accommodation type stayed in by American travellers by the number of outdoor activities

	Took a pleasure trip but no outdoor activities	Participated in one to two outdoor activities	Participated in three to five outdoor activities	Participated in six or more outdoor activities
Size of Market	43,251,588	44,896,863	41,838,572	40,523,218
Public Campground	23.3%	30.1%	31.6%	42.8%
Lakeside / Riverside Resort	21.9%	19.0%	22.9%	32.2%
Private Campground	18.0%	17.9%	19.1%	24.7%
Camp Site in a Wilderness Setting	3.8%	5.5%	7.7%	14.9%
Wilderness Lodge You Can Drive to	3.9%	4.8%	5.4%	10.7%
Motor Home or RV	8.7%	7.7%	7.7%	10.0%
Health Spa	4.9%	4.1%	5.4%	8.9%
Country Inn or Resort with Gourmet Restaurant	4.7%	2.7%	2.7%	5.7%
Farm or Guest Ranch	3.6%	3.2%	3.3%	5.3%
Remote or Fly-In Wilderness Lodge	0.4%	0.8%	1.3%	2.8%
Remote or Fly-In Wilderness Outpost	0.2%	0.3%	0.5%	1.7%

Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007

The figure below demonstrates how the importance of booking online increases with the number of outdoor activities engaged in while on trips. Naturally, we can assume that web information on tourism activities offered at a destination is equally important to active outdoor travellers.

Figure 23: Percentage who used internet to book part of trip by the number of outdoor activities taken



Source: TAMS *Outdoor Activities While on Trips of One or More Nights* – U.S. Travel Market, September 24, 2007. TAMS *Outdoor Activities While on Trips of One or More Nights* – Canadian Travel Market, February 29, 2008

3. Profile of Travellers by Key Outdoor Activity Type

The following section provides an overview of the profile of travellers who engage in a specific outdoor activity while on a trip. Although the data is on Canadian travellers, many similarities would be found with American or other foreign travellers engaged in the same activity while on a trip. The objective is to get a psychographic and demographic understanding of specific outdoor types rather than a geographical profile.

3.1. Wildlife Viewing[17]

- Over the last two years, 30.7% (7,605,527) of adult Canadians went wildlife viewing while on an out-of-town, overnight trip of one or more nights.
- Specific wildlife viewing activities undertaken by Canadian pleasure travellers by order of popularity:
    - Visiting a nature park (22.8%)
    - Land-based animals (10.4%)
    - Whales and other marine life (8.4%)
    - Wildflowers and flora (7.7%)
    - Birds (7.5%)
    - Northern Lights (4.4%).
- Of those who went wildlife viewing, 35.3% (2,681,779) reported that this activity was the main reason for taking at least one trip. Wildlife viewing was the outdoor activity cited eighth most often as the main reason for taking a trip.
- Relative to the average Canadian Pleasure Traveller, Wildlife Viewers are slightly more likely to be female (52.9%), 25 to 54 years of age and married with dependent children living at home.
- Wildlife Viewers are more likely to have a university education and their household income is close to the average Canadian Pleasure Traveller ($74,554).
- Wildlife Viewers frequently travel within Canada (97.9%) and were more likely than the average Canadian Pleasure Traveller to have taken trips to other provinces or regions in the past two years. They were especially more likely than average to have visited the western provinces, the northern territories and Prince Edward Island.
- Wildlife Viewers were more likely to have participated in outdoor activities when on trips than the typical Canadian Pleasure Traveller and especially in nature-oriented activities (e.g., hiking, climbing & paddling, cycling, cross-country skiing & snowshoeing, wilderness activities).
- They were more likely to have camped, stayed in the wilderness and to have taken wilderness tours in the last two years.

[17] Retrieved from http://www.tourism.gov.on.ca/english/research/travel_activities/wildlife_cdn.htm

- Wildlife Viewers were also very active in culture and entertainment activities when travelling, and were particularly likely to have patronized educational attractions (e.g., historical sites, museums & galleries, science & technology exhibits, aboriginal cultural experiences).
- Relative to other Canadian Pleasure Travellers, Wildlife Viewers seek vacations that are intellectually stimulating, novel and memorable.
- Wildlife Viewers were more likely than average to use the Internet to plan (69.2%) and book travel (44.9%). They are particularly likely to use official tourism information sources (e.g., brochures & guides, visitor information centres, websites) to plan trips. They can be most effectively targeted through travel, nature and home-related media.

3.2. Hiking, Climbing, Paddling[18]

- Over the last two years, 25.4% (6,281,852) of adult Canadians went hiking, climbing and paddling while on an out-of-town, overnight trip of one or more nights.
- Of those who went hiking, climbing or paddling while on an out-of-town, overnight trip, 33.9% (2,126,660) reported that this activity was the main reason for taking at least one trip.
- Specific activities participated in by order of popularity:
  - Hiking/backpacking in wilderness with overnight camping/lodging (58.8%)
  - Freshwater kayaking/canoeing (32.9%)
  - Hiking as a sameday excursion (22.2%)
  - Rock climbing (24.4%).
- Other outdoor activities (those relevant to NW Ontario only) participated in while on trips:
  - Wildlife viewing (68.6%)
  - Boating & swimming (63.6%)
  - Fishing (31.2%)
  - Golfing (20.9%)
  - Snowmobiling & ATVing (14.3%)
  - Hunting (5.0%).
- Travellers of this segment type tend to be younger than the average Canadian pleasure traveller and are over-represented among young singles and young couples.
- This is a well-educated segment with 40.1% having a university degree (the sixth highest of the 21 outdoor activity types).
- They have above-average household incomes ($77,490).

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[18] Retrieved from http://www.tourism.gov.on.ca/english/research/travel_activities/hiking_cdn.htm

- Almost all Hikers, Climbers & Paddlers have taken a trip within Canada during the past two years (98.5%) and they were more likely to have traveled to other provinces and regions in Canada (57.4%) than the average Canadian Pleasure Traveller.
- They are more likely than average to have taken part in participatory cultural activities (e.g., participatory historical activities, aboriginal cultural experiences) and to have patronized live arts performance (e.g., musical concerts, high arts). Key activities pursued while on trips include:
    - Shopping & dining (90.2%)
    - Historical Sites, museums and art galleries (76.3%)
    - Fairs & festivals (51.2%)
    - Musical concerts, festivals & attractions (45.9%)
    - Wine, beer & food tastings (33.2%)
    - Live theatre (27.0%)
    - Agro[19]-tourism (22.3%)
    - Aboriginal cultural experiences (20.4%)
    - Spas (15.1%).
- They typically stay in public campgrounds (44.5%) and lakeside resorts (30.5%). Other accommodations include:
    - Drive-in wilderness lodge (9.1%)
    - Health spa (8.6%)
    - Farm or guest ranch (4.7%)
    - Fly-in wilderness lodge or Outpost (3.7%).
- Hikers, Climbers and Paddlers were more likely than the average Canadian pleasure traveller to have taken a wide variety of tours during the past two years.
- They seek novelty, intellectual stimulation and physical challenges when they travel.
- Hikers, Climbers & Paddlers are among the most frequent users of the Internet to plan (75.1%) and book (49.9%) travel. They are also above-average consumers of tourism media.

[19] Agro-tourism, also know as agri-tourism is farm-based tourism where accommodation and restoration services are provided by agriculture operators for the purpose of education of the public; bringing visitors in touch with agriculture activities, local products, and the farming lifestyle. It also allows producers to generate additional farm income and to promote their products.

3.3. Fishing[20]

- Over the last two years, 17.6% (4,351,708) of adult Canadians went fishing while on an out-of-town, overnight trip of one or more nights.
- Fresh-water fishing (15.3%) on trips was more common than ice fishing (3.9%), or salt-water fishing (3.1%).
- Among those who fished on trips, almost one-half (48.6%, or 2,115,688 adult Canadians) reported that fishing was the main reason for taking at least one trip.
- Anglers are predominantly male (61.2%), and well-represented among those 18 to 54.
- 72.3% are married and 66.3% have no children under 18.
- Average household income is $76,370. They are the third least likely to have a university education of the 21 outdoor activity types.
- Anglers are overrepresented in Saskatchewan and Manitoba.
- 93.5% of Anglers took a trip in the same province while 51.2% reported taking a trip in an adjacent province or region.
- Type of accommodation stayed at while on trip in the last two years:
    - Public campground: 39.4%
    - Lakeside resort: 30.3%
    - Drive-in wilderness lodge: 14.2%
    - Fly-in wilderness lodge or outpost: 6.7%
    - Health spa: 6.3%.
- Outdoor Activities pursued while on trips include:
    - Wildlife viewing: 51.7%
    - Hiking, climbing & paddling: 45.0%
    - Golfing: 28.0%
    - Snowmobiling & ATVing: 24.3%
    - Hunting: 13.9%
    - Cross-country skiing & snowshoeing 13.6%
    - Wilderness activities: 4.2%.
- Culture and entertainment activities pursued while on trips:
    - Shopping & dining: 82.8%
    - Historical sites, museums & art galleries: 58.3%

[20] Retrieved from http://www.tourism.gov.on.ca/english/research/travel_activities/fishing_cdn.htm

    - Fairs & festivals: 46.8%
    - Musical concerts: 39.6%
    - Wine, beer & food tastings: 26.0%
    - Live theatre: 21.8%
    - Agro-tourism: 21.2%
    - Aboriginal cultural experiences: 15.7%
    - Spas: 10.5%.

- 21.0% of Anglers reported taking a sameday guided tour while on an overnight trip, 15.2% reported taking a sightseeing cruise, and 17.5% took a wilderness tour.
- Anglers are less likely to use the Internet to plan (60.1%) or book travel (35.3%). They tend to rely on past experience, word-of mouth and maps when planning travel. Anglers can be most effectively targeted through outdoor and nature magazines and sports-related media.
- The person who plans trips:
    - Survey respondent plans trips: 38.3%
    - Trip planning a shared responsibility: 17.2%
    - Someone else plans trips[21]: 44.4%.
- Information sources consulted:
    - Internet website: 65.4%
    - Word-of-mouth: 56.2%
    - Been there before: 55.5%
    - Maps: 35.5%
    - A travel agent: 31.0%
    - Official provincial travel brochures: 27.4%
    - Visitor information centres: 24.3%
    - Articles in newspapers/magazines: 21.8%
    - Advertisements in newspapers/magazines: 14.8%
    - Programs on television: 9.7%
    - Travel info received by mail: 9.1%
    - Trade shows: 5.4%
    - E-mail newsletter: 3.6%.

[21] Note that 31.0% of anglers declared consulting a travel agent.

3.4. Snowmobiling and ATVing[22]

- Over the last two years, 8.4% (2,091,778) of adult Canadians used a snowmobile or all-terrain vehicle (ATV) while on an out-of-town, overnight trip of one or more nights.
- Of those who went snowmobiling or ATVing, 40.2% (840,100) reported that this activity was the main reason for taking at least one trip.
- The majority of Snowmobile and ATVers are male (57.7%) and 18 to 44 years of age.
- They are over-represented among Young Singles, Young Couples and especially Young Families (children 12 or younger living at home).
- They are the second least likely of the 21 outdoor activity types to have a university education (22.7%) and their household incomes ($77,737) ranked 14th overall.
- Snowmobile and ATVers are less frequent travellers than most of the other outdoor activity types.
- Snowmobile and ATVers are very active in nature-based activities such as hunting, fishing, camping and wilderness activities. They also enjoy motorcycling, horseback riding, team sports and a wide array of strenuous winter activities (e.g., downhill skiing and snowboarding, cross-country skiing and snowshoeing).
- They were quite active in culture and entertainment activities and exhibited special interest in sporting events, equestrian and western events (e.g. rodeos) and comedy festivals and clubs.
- They most often stay in public and private campgrounds and wilderness settings.
- They enjoy vacations that are relaxing, unstructured and offer solitude.
- Snowmobile and ATVers are below-average users of the Internet to plan (59.2%) and book travel (34.2%). They also under-utilize travel-related media resources. They can be most effectively reached through sports-related media and automobile & cycle magazines and popular television programming (e.g., reality TV).

3.5. Cross-Country Skiing and Snowshoeing[23]

- Over the last two years, 6.9% (1,715,769) of adult Canadians went cross-country skiing or snowshoeing while on an out-of-town, overnight trip of one or more nights.
- Of those who went cross-country skiing or snowshoeing while on an out-of-town, overnight trip, 35.3% (605,715) reported that this activity was the main reason for taking at least one trip in the past two years.
- Cross-Country Skiers and Snowshoers are more likely to be:
    - Female (54.0%)
    - Slightly over-represented among those 18 to 34 years of age

[22] Retrieved from http://www.tourism.gov.on.ca/english/research/travel_activities/snowmobiling_atv_cdn.htm

[23] Retrieved from http://www.tourism.gov.on.ca/english/research/travel_activities/CDN_TAMS_2006_Cross-Country_Skiing_and_Snowshoeing_Oct2007.pdf

  - Especially over-represented among Young Singles and Young Couples
  - They are the most likely of the 21 outdoor activity types to have a university education (44.8%)
  - Their household income ($78,897) is above-average.

- Cross-Country Skiers and Snowshoers were highly active in both outdoor activities and culture and entertainment pursuits while travelling.
- They seek vacations that are unique and different, intellectually stimulating and physically challenging.
- Cross-Country Skiers and Snowshoers are frequent travellers. They were the most likely of all the outdoor activity types to have taken trips within their own province or region (96.6%) and the second most likely to have traveled to a non-adjacent province or region (42.4%) in the last two years.

3.6. Hunting[24]

- Over the last two years, 3.5% (869,255) of adult Canadians went hunting while on an out-of-town, overnight trip of one or more nights.
- Of those who went hunting, 74.0% (643,154) reported that hunting was the main reason for taking at least one trip.
- Hunters are more often male (76%) than is found in any other outdoor activity type.
- They are predominantly 35 to 54 years old (the second oldest of the 21 segments) and married.
- Their household income ($72,789) is the second lowest of the 21 outdoor activity types and they are the least likely to have post-secondary education.
- Hunters are primarily domestic travellers.
- 70.2% have no children under 18.
- Outdoor Activities pursued while on trips include:
  - Fishing: 69.8%
  - Snowmobiling & ATVing: 47.0%
  - Wildlife viewing: 45.1%
  - Hiking, climbing & paddling: 35.8%
  - Golfing: 23.7%
  - Cross-country skiing & snowshoeing: 14.1%
  - Wilderness activities: 8.7%.
- They were less likely than the average Canadian Pleasure Traveller to participate in most culture and entertainment activities.

[24] Retrieved from http://www.tourism.gov.on.ca/english/research/travel_activities/hunting_cdn.htm

- Hunters were also much more likely than the average Canadian Pleasure Traveller to stay in camping areas and remote wilderness lodges.
- Hunters were the least likely of the 21 outdoor activity types to use the Internet to plan (42.2%) or book trips (23.2%) in the past two years. They were more likely to rely on their past experience and word-of-mouth for travel planning. However, Hunters can be best reached through country music radio stations, outdoor and sports magazines, automobile and cycle magazines and sports-related media.
- Culture and entertainment activities pursued while on trips:
    - Shopping & dining: 76.6%
    - Historical sites, museums & art galleries: 48.1%
    - Fairs & festivals: 39.0%
    - Musical concerts: 36.2%
    - Agro-tourism: 24.0%
    - Aboriginal cultural experiences: 14.4%
    - Spas: 8.7%.

3.7. Wilderness Activities[25]

- Over the last two years, 1.8% (436,817) of adult Canadians participated in wilderness activities[26] while on an out-of-town, overnight trip of one or more nights.
- Taking a wilderness skills course (1.1%) was the most common activity, followed by dog sledding (0.7%) and ice climbing (0.2%).
- Wilderness skills courses (41.2%) and dog sledding (36.9%) were often reported as the main reason for taking at least one trip.
- Those who participated in wilderness activities are more likely to be between 18 to 44 years of age, equally divided among males and females, with no dependent children, well-educated, and with a slightly above average household income compared to the average Canadian pleasure travellers.
- Those who participated in wilderness activities are most likely to travel within their own province or region (95%). Most travelled in Ontario.
- Relative to the average Canadian Pleasure Traveller, those who participated in wilderness activities were exceptionally active when travelling. Other key outdoor activities most pursued while on trips:
    - Wildlife viewing (78.0%)
    - Hiking, climbing & paddling (72.3%)
    - Boating & Swimming (66.6%)

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[25] Retrieved from http://www.tourism.gov.on.ca/english/research/travel_activities/wilderness_cdn.htm, 2007
[26] Activities include: Wilderness skills course, dog sledding, and ice climbing.

  - Fishing (42.3%)
  - Cross-country skiing & snowshoeing (41.0%)
  - Snowmobiling & ATVing (26.5%)
  - Golfing (19.4%)
  - Hunting (17.3%)
  - Sailing, windsurfing, parasailing (13.6%).

- They also exhibit a keen interest in culture and entertainment activities that are educational or experiential (e.g., aboriginal cultural experiences, wilderness tours). They seek vacations that are novel, physically challenging and intellectually stimulating as well as social and inexpensive. Activities most pursued while on trips included:
  - Shopping and dining (91.7%)
  - Historical sites, museums and art galleries (85.9%)
  - Fairs and festivals (67.5%)
  - Musical concerts, festivals and attractions (59.7%)
  - Wine, beer and food tastings (47.8%)
  - Live theatre (37.0%)
  - Aboriginal cultural experiences (34.0%)
  - Participatory historical activities (26.9%).
- The majority while on trips stayed at a public campground (53.8%), a lakeside resort (44.0%), or a camp site in a wilderness setting (39.1%).
- Wilderness enthusiasts also participate in the following tours: scenic drives (42.5%), wilderness tours (39.3%), and sightseeing cruises (24.3%).
- When making vacation plans, travellers who participate in wilderness activities tend to consult a wider variety of information sources than the average Canadian Pleasure traveller. The majority use the Internet, word-of-mouth and past experiences to plan travel. However, they are much more likely than the typical Canadian Pleasure traveller to obtain travel information from television programs and television advertising, direct mail and electronic newsletters, travel guidebooks such as Fodor's and trade, travel or sports shows.

4. Tourism Outlook and Trends

This section focuses less on the economic outlook of the tourism industry and more on tourism trends, given that long-term forecasting is harder to predict in times of economic volatility and can be unreliable. What is certain is that travelling is a luxury, and in the face of a global economic recession, the competition for tourism dollars increases. To remain competitive, it is important to stay abreast of the changing needs and desires of tourists and to update or create new tourism products to fit. The good news is that the world population is increasing and with it the number of travellers. And as cities increasingly become congested, the demand to escape to isolated wilderness destinations will inevitably rise.

4.1. The Outlook on Market Volume and Origin

"According to the United Nations World Tourism Organization, the number of worldwide travellers is expected to double by 2020"[27].

"High oil prices and their effect on rising transportation costs are one of the main reasons for the struggles of the transportation industry and of those of the travel industry overall."[28]

Although at the time of this report, fuel prices have significantly dropped due a global over supply, plans to decrease production have recently been announced by the Organization of the Petroleum Exporting Countries (OPEC) which will eventually result in fuel prices rising again.

In the Travel Intentions Study of May 2008, 9% of Americans who were surveyed (5,822 total U.S. respondents) expressed having issues that made them less inclined to travel to Ontario; 19% of which selected "cost" as being an issue (an increase of 15% from Feb 2007), and 14% selected "passport requirements" (a drop of 26% from Feb 2007).

Forecasts for inbound visits to Ontario, as illustrated below, show a steady increase from 2009 onwards.

[27] Ontario Ministry of Tourism. (2008). *Facts & Figures* (newsletter No. Spring 2008)
[28] Canadian Tourism Commission. (2008). *Canada's Tourism Industry: Industrial Outlook* (Report No. Summer 2008), p. 24

Table 17: Total Ontario inbound visits forecast (% change over previous year)

Total Ontario Inbound							
	2006	2007	2008	2009	2010	2011	2012
Total Visits (000)	-3.4%	1.1%	-0.6%	1.1%	1.5%	1.6%	1.7%
Overnight	0.0%	-0.3%	-0.7%	0.3%	1.4%	1.9%	2.2%
Same-day	-5.7%	2.1%	-0.5%	1.6%	1.6%	1.4%	1.4%
Business	-3.5%	-0.7%	-1.1%	1.3%	2.3%	1.1%	1.1%
Non-business	-3.4%	1.2%	-0.5%	1.1%	1.4%	1.7%	1.8%
Total Expenditures ($000)	-0.6%	1.4%	-1.2%	-0.8%	1.7%	3.1%	3.2%
Overnight	1.2%	-1.1%	-2.4%	1.1%	2.1%	3.5%	3.4%
Same-day	-5.1%	8.1%	1.5%	-5.0%	0.6%	2.3%	2.8%
Business	0.6%	-0.6%	-6.3%	-0.7%	2.9%	2.7%	2.6%
Non-business	-0.9%	2.0%	0.3%	-0.8%	1.3%	3.3%	3.4%
NOTE: Total visits include domestic, U.S. and overseas, though expenditures include only those of Canadian and U.S. visitors.							

Source: Ontario Tourism Outlook 2008-2012, March 2008.

The following table illustrates the impact the WHTI[29] had on U.S. visitors to Canada.

Table 18: WHTI impact on visits forecast

WHTI Impact on Visits ('000)				
	2009	2010	2011	2012
Intra-Provincial Visits	706	747	815	869
Visits to the US	-344	-423	-395	-352
Visits from the US	-1,460	-1,460	-1,460	-1,460

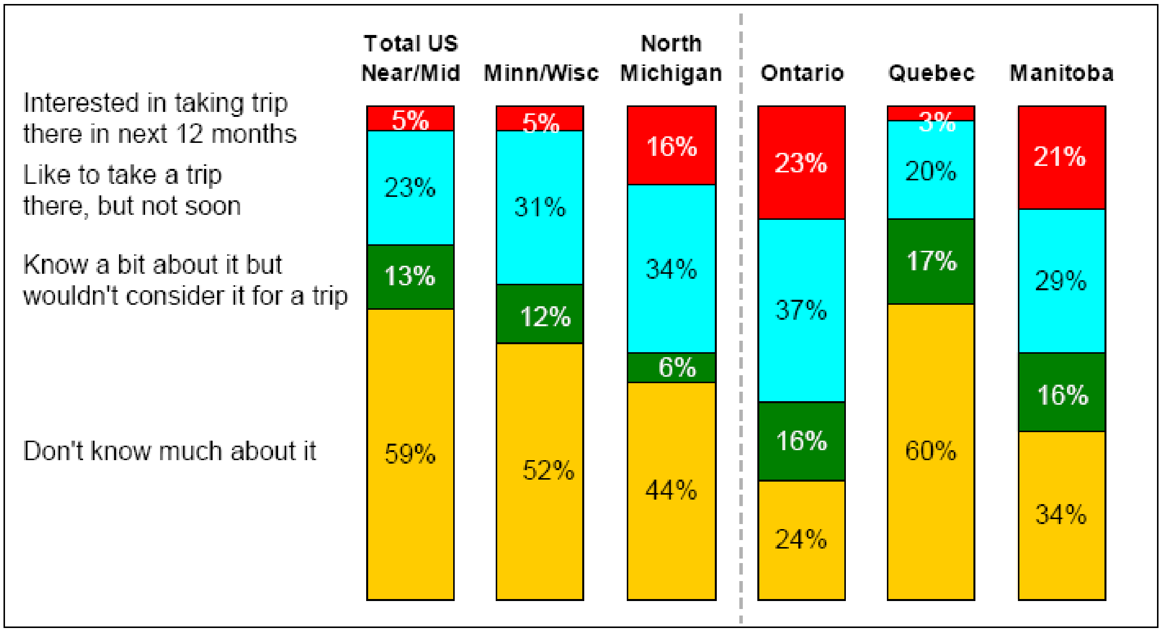
Source: Ontario Tourism Outlook 2008-2012, March 2008.

For each region identified in the figure below, at least 23% of residents surveyed indicated that they would be interested in visiting Northern Ontario. For Ontario residents, this figure jumps to 60%.

It is important to note that for those who responded “don’t know much about it” indicate a large untapped market with the potential of being future travellers to Northern Ontario once informed.

[29] Western Hemisphere Travel Initiative is a U.S. law that requires all travellers, including U.S. and Canadian citizens, to present a valid passport or other approved secure document when entering the United States from within the western hemisphere. Retrieved from http://www.cbsa-asfc.gc.ca/whti-ivho/menu-eng.html

Figure 24: Percentage of travellers by level of familiarity and interest of Northern Ontario – May 2008



Source: TNS Canadian Facts, *Travel Intentions Study Wave 10 – May 2008*, p.50

The table below is based on the results of a recent survey. It shows a growth in percentage of Winnipeg residents who are very interested in visiting Northern Ontario.

Residents of North Michigan showed the strongest decline from the previous year.

A large percentage of Ontario residents (25%) expressed a strong interest in visiting Northern Ontario in the next two years.

Table 19: Percent of residents by location stating "very interested" in visiting Northern Ontario

		Percent Of Residents In Each Case Stating "Very Interested"			
		Feb '07	Feb '08	May '08	Change Feb '07 to May '08
Total US Near & Mid	%	7	3	4	-3
Minnesota/Wisconsin	%	5	2	3	-2
North Michigan	%	16	5	9	-7
Ontario	%	25	21	23	-2
Quebec	%	5	1	3	-2
Winnipeg	%	13	17	15	+2

Source: TNS Canadian Facts, *Travel Intentions Study Wave 10 – May 2008*, p.51

4.2. The Impact of Changing Demographics

David Redekop of the Canadian Tourism Research Institute provides an outlook on baby boomer travellers in his short commentary to the Conference Board of Canada's *Hot Topics in Economics* titled *Canada's Greying Air Travellers* (July 23, 2008):

> In 2002 alone, the number of Canadians between the ages of 55 and 59 grew by 7.2 per cent, compared with a 1.1 per cent average growth rate for the Canadian population. This kind of growth rate drives markets.
>
> As more boomers move into the 55-plus age bracket, their presence will be strongly felt in the travel industry. Canadians between 55 and 69 years of age will continue to represent the largest share of the country's population until the mid 2020s.
>
> Projections indicate, however, that the number of Canadians in the prime age group for travel (55 to 69) will begin to decline in about four years; the Conference Board's analysis points to diminishing travel demand beginning in 2012. The propensity to travel outside the country begins to fall when people turn 70. Historical trends indicate that health issues emerge at that age, and the level of interest in travelling (at least in the same manner) diminishes.
>
> In 2012, Canada's multi-billion-dollar travel industry will begin to lose the demographic push that it has found so beneficial. Tourism operators will have to turn to other, less age-dependent travel markets to continue the industry's impressive growth rate of the past decade.

In the FedNor 2004 report titled *Northern Landscapes: Opportunities for Nature-Based Tourism in Northern Ontario,* the outlook at the time on female travellers still applies today:

> Traditional gender differences – he fishes while she goes to the local art gallery or sits by the lake reading a book – are breaking down as tourism operators create nature-based products specifically designed for women.
>
> The tourism industry should learn to cater to women: they have different outdoor interests and skill levels than men. They also have different expectations of cleanliness, linen and towels, and food presentation than do men. Women tend to travel alone or in groups with other women. (p.6)

The same 2004 report also gives insight on the impact of aging baby boomer travellers, which is apparent today:

> As baby boomers age, they will seek softer outdoor experiences and more information on the place they are visiting and the people who live there. An obvious opportunity for creating an experiential or learning holiday is linking Aboriginal history and culture with nature-based activities such as fishing, hiking, canoeing, bird watching or wildflower viewing.

> Winter will be an increasingly difficult "sell" as North Americans get older. Northern Ontario's traditional markets – people who live in northern climates all year long – are more likely to go "south" for holidays than they are to seek nature-based tourism experiences in the cold. (p.7)
>
> Tourists are increasingly interested in *comfort* and are increasingly *health* conscious. As a consequence, there will be greater demand for products that offer quality, convenience and security, easy transportation, and 'wellness' including spas and fitness centres. (p.8)
>
> Older tourists are more sophisticated tourists. Their standards are high. Their fidelity to a specific destination is expected to decline over time as their experience broadens and their demands for new experiences and high quality increase. (p. 8)

In an article, written by S. Thorne, titled *Place as Product: A Place-Based Approach to Cultural Tourism*, the author states:

> By the year 2020, the combined Canadian/U.S. population between the ages of 55 and 74 will swell to 83.5 million – a 39 percent increase from 2008[30]. This is the Canadian/U.S. baby boom – the most affluent and educated generation in North American history. Boomers are driving the market for cultural tourism today. Once retired, they will drive it for years to come. (p.26)

4.3. The Outlook by Activity Type

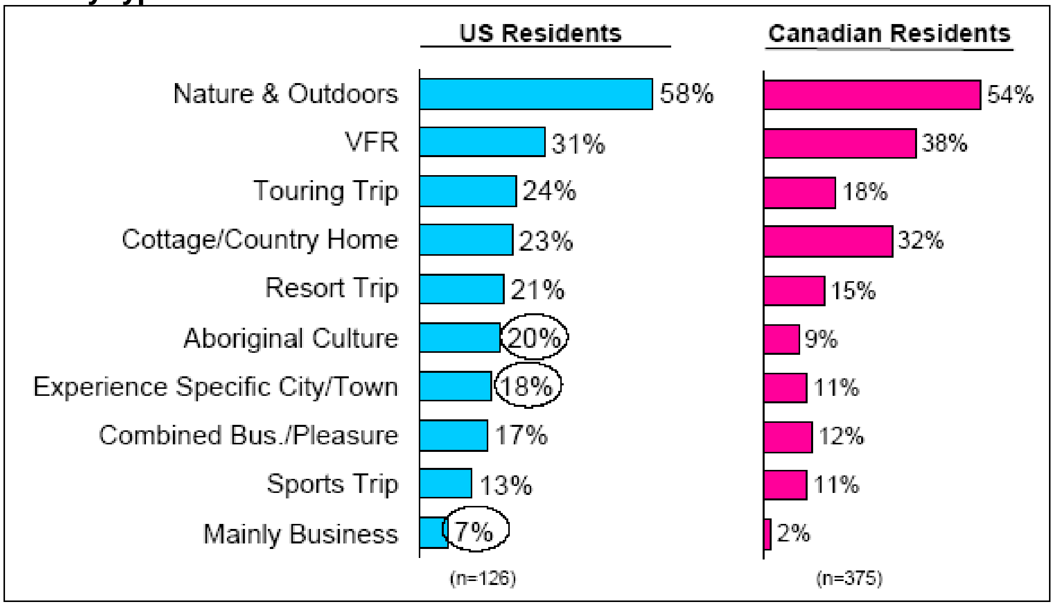
A recent travel intentions survey conducted in spring of 2008 found that close to 60% of travellers from key Northern Ontario markets were planning to visit Northern Ontario in following months to experience nature and the outdoors.

20% of Americans were travelling to Northern Ontario to experience Aboriginal Culture and another 18% expressed wanting to see a particular town.

More than triple the number of Americans than Canadians expressed going to Northern Ontario on business.

[30] Source from author: David Baxter, Urban Futures

Figure 25: Percentage of those planning a trip in the next 6 months (June to Dec 08) by activity type[31]



Source: TNS Canadian Facts, *Travel Intentions Study Wave 10 – May 2008*, p.52

When questioning "Nature and Outdoors" travellers on the specific activities they plan on participating in, 25% of Americans expressed Hiking/Backpacking and 26% of Canadians were going to Northern Ontario to do some camping.

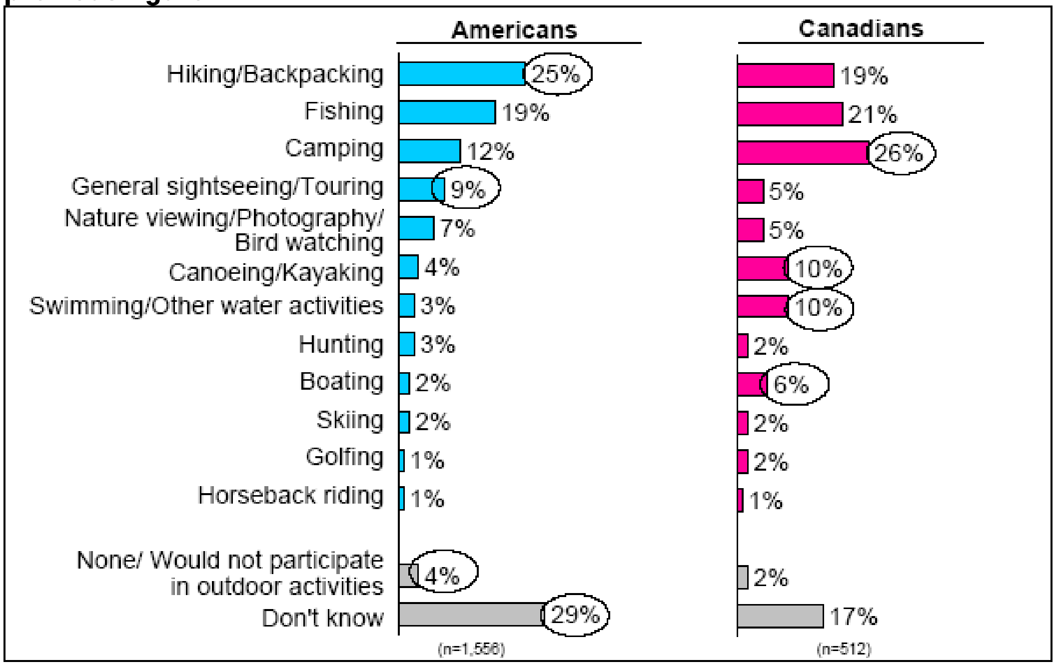
A much greater number of Canadians than Americans planned on Canoeing/Kayaking, Swimming/Other water activities, and Boating.

A greater number of Americans compared to Canadians indicated the desire to do General Sightseeing/Touring.

More Americans than Canadians indicated they would not do any outdoor activities and almost triple the number of Americans compared to Canadians responded that they did not know what they would do.

[31] Note: in this figure the term VFR stands for Visiting Friends and Relatives

Figure 26: Outdoor activity type for those who rated high for Nature & Outdoors in the previous figure



Source: TNS Canadian Facts, *Travel Intentions Study Wave 10 – May 2008*, p.55

FedNor's *Northern Landscapes: Opportunities for Nature-Based Tourism in Northern Ontario* report, 2004, provides the following outlook on the American anglers market:

> The American angling market is highly concentrated in near-border states and among men. Challenges in retaining lucrative American nature-based tourists will be substantial because the traditional population base – Michigan, Minnesota, Ohio and Wisconsin – is expected to decline over the next two decades.
>
> Maintenance of the important American angler market for the North will likely require extending the marketing reach to more distant states in the U.S.A. – California and Texas, for example.
>
> As Americans move further south – out of the drive market to Northern Ontario, they will be more difficult to attract. And as they age, many of them are expected to be less interested in rugged outdoor experiences that have been the hallmark of tourism in the North. (p. 6)

4.4. Other Changing Trends

Another interesting excerpt from S. Thorne's *Place as Product: A Place-Based Approach to Cultural Tourism* article states the following:

> Culture-consuming boomers are savvy, sophisticated travellers who seek learning and enrichment. In the ever-more competitive world of tourism, destinations that embrace holistic, customer-oriented, place-based cultural tourism will eclipse other destinations that cling to conventional, supplier-driven, attractions-based approaches. (p.56)

Safety, security and health will be increasingly important to for future travellers as explained in FedNor's *Northern Landscapes: Opportunities for Nature-Based Tourism in Northern Ontario:*

> Tourists are increasingly interested in comfort and are increasingly health conscious. As a consequence, there will be greater demand for products that offer quality, convenience and security, easy transportation, and 'wellness' including spas and fitness centres. (p.8)
>
> In light of terrorism, regional wars, pollution, and disease, tourists will feel an increasing need for safe and secure destinations. They will avoid destinations that are perceived to be "at risk" or unsafe. (p.9)

Increasing stress and lack of time will continue to impact travel choices:

> Demands on leisure time will lead to fewer long haul or long duration holidays and more short-haul holidays. This trend will make it increasingly difficult for Northern Ontario destinations to attract tourists from distant markets.
>
> With many tourists working longer hours and juggling work/family commitments, some want to cram multiple activities into each trip. A current example of products being developed to meet this need is the adventure spa that combines outdoor sports with yoga and massage. Another example is growth in tacking extra leisure days on to business trips to get in some trail biking or white water rafting. (FedNor, p.9)

The use of online travel booking and research will continue to grow in popularity amongst travellers of all ages. In our increasingly information-rich culture, travellers strive to optimize online efficiency by scanning websites for key words and pictures that reflect the experiences they are seeking. Wordy websites will be a thing of the past.

Environmental concerns and social responsibility is also on the rise in travel consumers. As travellers look for authentic and ethical experiences, they will be critical of products that do not adhere to their principles.

4.5. Emergent Vacation Interests

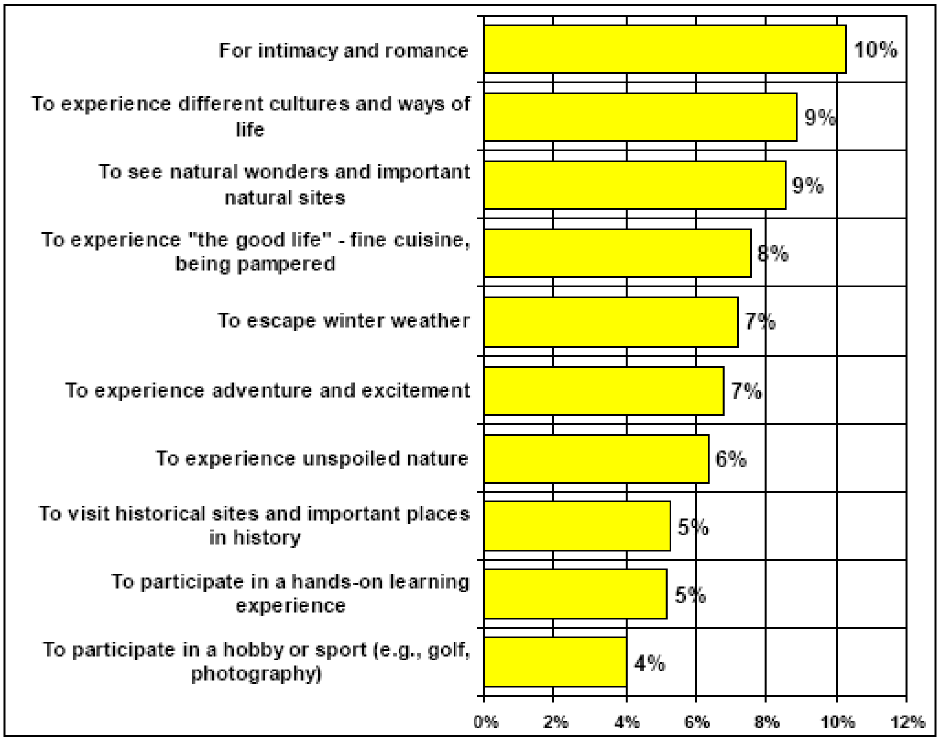
The following list provides some travel experiences that are growing in popularity. They reflect the nature of tourism products consumers are seeking, in which activities are authentic and enriching, appealing to the senses and the emotions. Some examples include:

- Wilderness survival
- Unspoiled nature
- Adventure tourism (which combines physical activity, culture and nature)
- Extreme tourism (an element of danger is involved i.e. visiting underground mines)
- Place-based culture (culture that is unique to the community)
- Northern lights or other arctic experience
- Participatory historical experiences
- Carnivals
- Spas and retreats
- Agri-tourism
- Learning and enrichment travel
- Remote aboriginal experiences
- Local wine and food tastings
- Local outdoor cafes.

These interests are reflected in the TAMS Emergent Vacation Interests Survey which was conducted in 2002[32]. The following figure reveals a significant trend in wanting to experience unspoiled nature and important natural sites as well as wanting to experience adventure and excitement.

[32] There is no current Emergent Vacation Interests Survey; nonetheless, the 2002 survey reveals what tourists wanted to do in 2003 and 2004. Many of those same desires are still relevant today.

Figure 27: Change in percent of “Likely to do: next two years versus past two years” – 2002



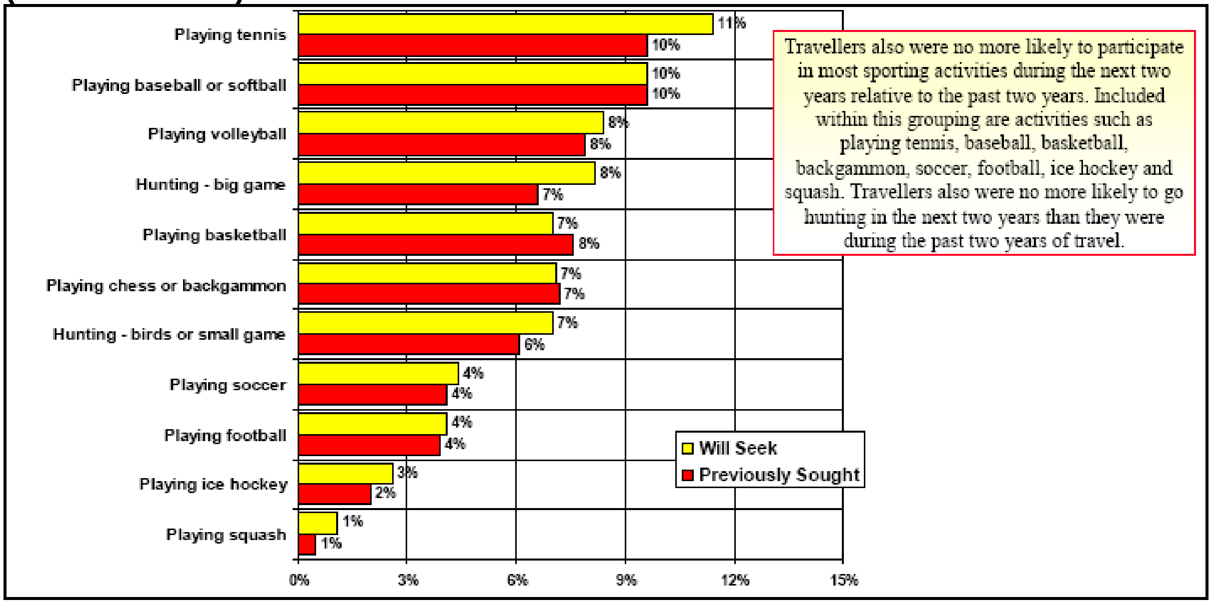
Source: TAMS Emergent Vacation Interests Survey, 2002, p.20

As illustrated in the following figure, interest in hunting has risen and may likely continue to rise. As contaminated food issues continue to make the daily news (i.e. Listeria bacterium found in processed meats) and with socially conscious living on the rise combined with the growing demand for antibiotic and hormone free meats, it is likely hunting will continue to grow in popularity.

Another form of hunting is gaining popularity as well: survival hunting - as in the popular TV show “*Survivorman*” with Les Stroud where one learns to survive with next to no resources. Other trends that could contribute to the growth of the hunting tourism industry include the growing demand for learning and enrichment travel, adventure tourism, and aboriginal tourism.

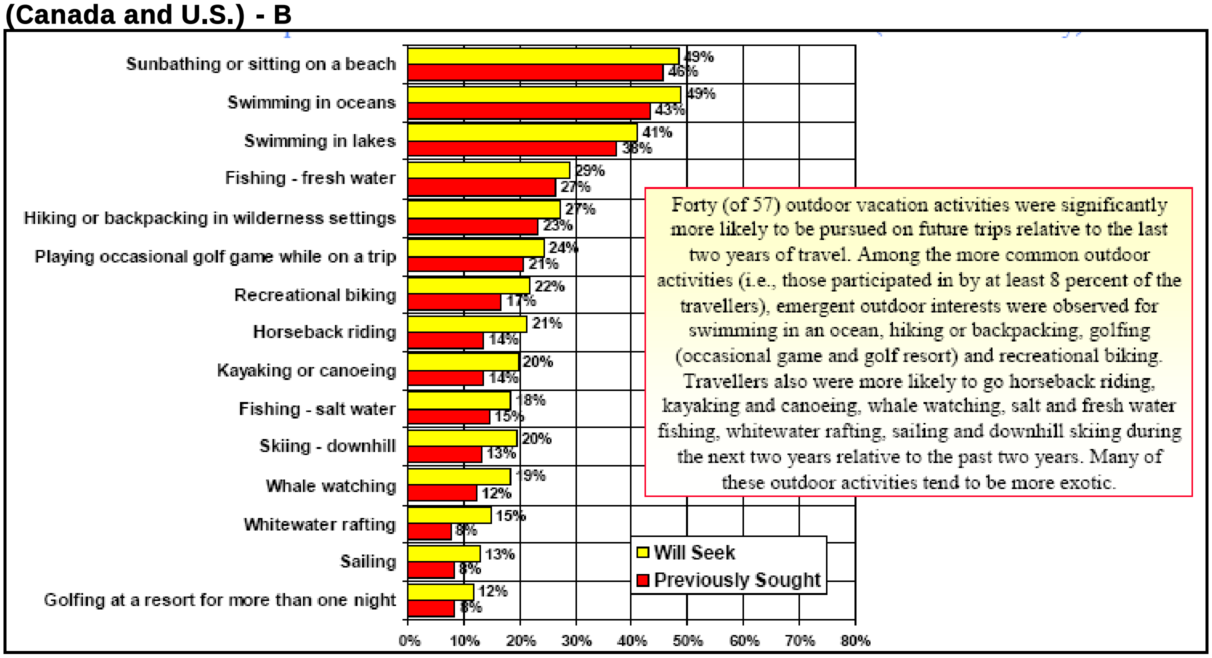
Culinary tourism also offers unique opportunities that could complement the hunting industry well such as a food event centered on the gathering and cooking of wild ingredients.

Figure 28: Outdoor activities more likely to be sought during travel in the next two years (Canada and U.S.) - A



A rise in the interest for fishing, hiking, kayaking/canoeing, and sailing activities is clearly illustrated in the following figure, further supporting the earlier claim that tourists are increasingly seeking natural environments.

Figure 29: Outdoor activities more likely to be sought during travel in the next two years (Canada and U.S.) - B



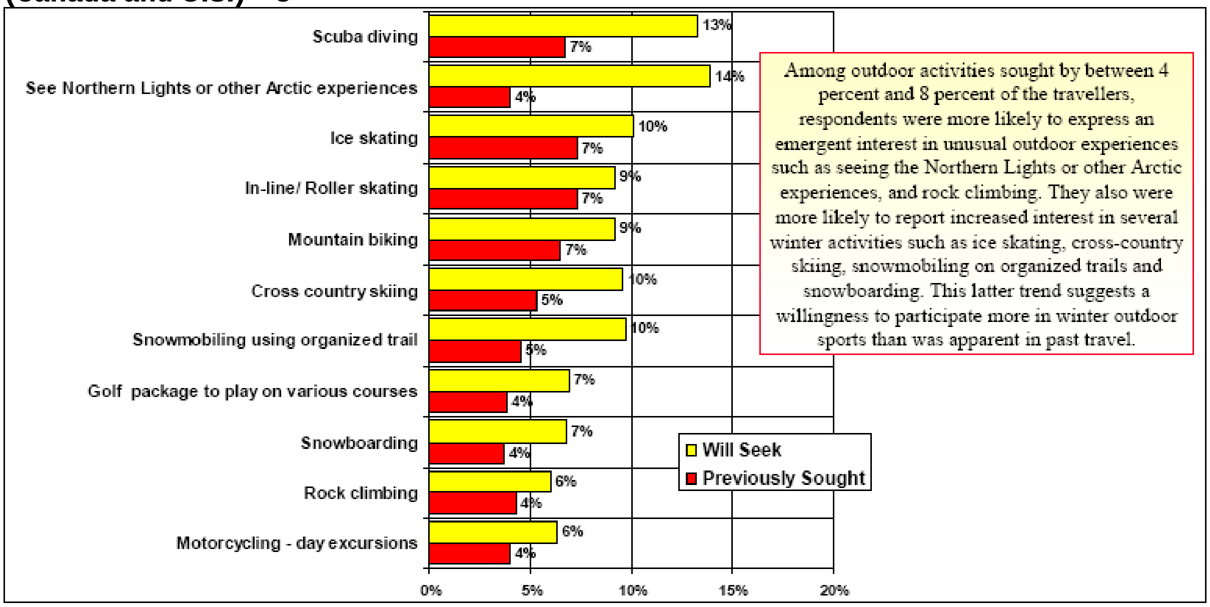
Source: TAMS Emergent Vacation Interests Survey, 2002, p.36

The following figures demonstrate a rise in the desire to see northern lights. This is perhaps the easiest of markets to serve since very little needs to be set up.

Birdwatching, wildflowers and flora viewing, and other wildlife viewing remained unchanged. They were likely to be sought in the next two years as in the last two. This may demonstrate a historical consistency in the demand for this type of tourism activity.

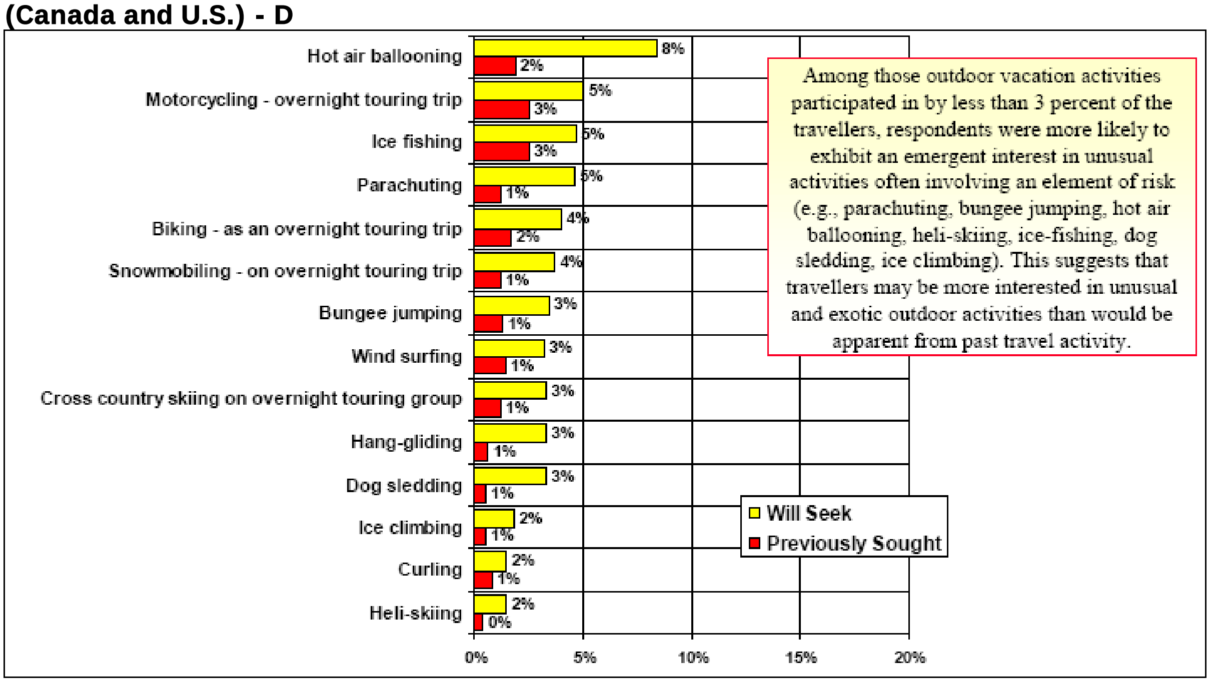
A growing interest in outdoor winter activities is also apparent.

Figure 30: Outdoor activities more likely to be sought during travel in the next two years (Canada and U.S.) - C



Source: TAMS Emergent Vacation Interests Survey, 2002, p.38

Figure 31: Outdoor activities more likely to be sought during travel in the next two years (Canada and U.S.) - D



Source: TAMS Emergent Vacation Interests Survey, 2002, p.38

4.6. Emergent Accommodation Types

The following accommodation types showed a positive growth by travellers (in the 2002 TAMS Emergent Vacation Interests survey) for accommodations more likely to be stayed in during the next two years compared to the past two years. Only accommodation types relevant to Northwest Ontario have been included here:

1. B&B
2. Public campgrounds
3. Lakeside resort in summer
4. Camping in non-public campgrounds
5. Private cottage of your own
6. Camping in wilderness setting
7. Wilderness lodges you can drive to
8. Lakeshore resort in winter
9. Health spa
10. Working farm or guest ranch
11. Remote fly-in lodge or outpost
12. Accommodation with gourmet restaurant.

Other accommodation types growing in popularity as well include Boutique Hotels[33] and unusual and unique hotels such as the Ice Hotel[34] in Quebec or the Kayadam Cave Hotel[35] in Turkey. The latter supports the trend for experienced-based tourism products.

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[33] http://en.wikipedia.org/wiki/Boutique_hotel
[34] http://www.icehotel-canada.com/
[35] http://www.hotelinteractive.com/article.aspx?articleID=7684