

CANADIAN TRAVEL MARKET

Attending Equestrian and Western Events While on Trips Of One or More Nights

A Profile Report

November 26, 2007

Prepared by Lang Research Inc. on behalf of:

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



Visiting Equestrian & Western Events While on Trips

Executive Summary

Over the last two years, 5.0% of adult Canadians (1,228,367) attended an equestrian or western event while on an out-of-town, overnight trip of one or more nights. 2.6% attended a western-themed event such as a rodeo, 2.1% attended a horse race and 0.9% attended an equine competition. Attending an equestrian or western event while on a trip was only the 19th most frequent culture and entertainment activity type undertaken by Canadian Pleasure Travelers in the past two years. However, of those who attended equestrian and western events, 36.1% (443,400) reported that this activity was the main reason for taking at least one trip. This is the 5th most common reason for travel among those participating in each of the 21 culture and entertainment activity types.

Relative to the average Canadian Pleasure Traveler, Equestrian and Western Event Attendees are over-represented among those 55 years and older and especially Senior Singles. They are more likely than average to have a high school education or less and they report the second lowest household income (\$72,488) of the 21 culture and entertainment activity types. They are over-represented among Canadian Pleasure Travelers living in Alberta and Saskatchewan.

Despite relatively modest means, Equestrian and Western Event Attendees are frequent domestic travelers. While they were only the 10th most likely of the 21 culture and entertainment activity types to have taken a trip within their own province or region (90.6%), they were the second most likely to have traveled to an adjacent province or region (62.3%) and the 3rd most likely to have visited a non-adjacent province or region (44.2%) in the past two years. They were also the 10th most likely to have visited the United States (59.4%), the 3rd most likely to have visited Mexico (18.7%) and the 8th most likely to have taken a trip to the Caribbean (19.2%).

Equestrian & Western Event Attendees are much more likely than the average Canadian Pleasure Traveler to attend festivals and fairs and sporting events while on trips. They also enjoy participatory historical activities (e.g., agro-tourism), comedy festivals and clubs and casinos. They were more than twice as likely to go horseback riding and motorcycling while on trips and are most likely to stay in public or private campgrounds when they travel. They seek vacations that create lasting memories, offer something new to see and do and allow them to reconnect with friends.

Equestrian & Western Event Attendees are less likely to use the Internet to plan (63.1%) and book (42.2%) travel than the other culture and entertainment activity types. And while they are above-average consumers of travel media, this activity segment can best be reached through sports media and country and western radio stations.

Attending Equestrian & Western Events While on Trips

Market Incidence

Over the last two years, 5.0% of adult Canadians (1,228,367) attended an equestrian or western event while on an out-of-town, overnight trip of one or more nights. 2.6% visited a western-themed event (such as a rodeo), 2.1% attended a horse race and 0.9% attended an equine competition. Attending an equestrian or western event while on a trip was the 19th most frequent culture and entertainment activity type undertaken by Canadian Pleasure Travelers in the past two years. However, of those who attended equestrian and western events, 36.1% (443,400) reported that this activity was the main reason for taking at least one trip in the past two years. This was the 5th most common reason for taking a trip of the 21 culture and entertainment activity types.

Fig. 1 Incidence of Visiting Equestrian & Western Events While on Trips¹

	Number of Equestrian or Western Event Attendees ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	1,228,367	443,400	18,439,508	24,776,103
Equestrian & Western Events (All Activities)	1,228,367	36.1%	6.7%	5.0%
Western theme event, such as a rodeo	641,900	39.2%	3.5%	2.6%
Horse race	520,714	30.5%	2.8%	2.1%
Equine (horse) competition	227,199	35.2%	1.2%	0.9%
Participated in all three activities	22,098	11.1%	0.1%	0.1%

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

Incidence by Region

Equestrian and Western Event Attendees are over-represented among Canadian Pleasure Travelers living in Alberta and Saskatchewan. They are least likely to live in the Atlantic Provinces and Quebec.

Fig. 2 Geographic Distribution of Those Who Visited Equestrian & Western Events While on Trips

	Total Population	Estimated Number Who Attended an Equestrian or Western Event on a Trip	Percent of Pleasure Travelers in Region Who Attended an Equestrian or Western Event on a Trip	Percent of Total Regional Population Who Attended an Equestrian or Western Event on a Trip
Canada	24,776,103	1,228,367	6.7%	5.0%
Atlantic Provinces	1,822,494	47,346	3.7%	2.6%
Quebec	5,940,869	205,015	4.9%	3.5%
Ontario	9,671,592	430,238	6.0%	4.4%
Manitoba	843,107	42,852	7.2%	5.1%
Saskatchewan	706,325	56,884	10.5%	8.1%
Alberta	2,465,540	245,014	12.2%	9.9%
British Columbia	3,326,176	201,020	7.6%	6.0%

Demographic Profile

Equestrian and Western Event Attendees are over-represented among those over 54 years of age and especially Senior Singles. They are predominantly married, but less likely to have dependent children (less than 18) at home. Relative to the other culture and entertainment activity types, this is a less affluent segment. Of the 21 culture and entertainment activity types, they are the least likely to have a university education (25.2%) and they have the second lowest household income (\$72,488).

Fig. 3 Demographic Profile of Equestrian and Western Event Attendees Relative to All Canadian Pleasure Travelers

Attribute	Size of Market	Attended an Equestrian or Western Event	Did Not Attend an Equestrian or Western Event ¹	Pleasure Travelers	Index ²
		1,228,367	17,211,141	18,439,508	100
Gender	Male	49.0%	48.8%	48.8%	100
	Female	51.0%	51.2%	51.2%	100
Age of Respondent	18 to 24	14.0%	12.7%	12.8%	109
	25 to 34	16.9%	19.5%	19.3%	87
	35 to 44	17.3%	20.8%	20.5%	84
	45 to 54	20.3%	20.3%	20.3%	100
	55 to 64	16.4%	14.0%	14.1%	116
	65 Plus	15.1%	12.7%	12.9%	117
Average Age		45.7	44.4	44.5	N/A
Marital Status	Not married	34.5%	32.1%	32.2%	107
	Married	65.5%	67.9%	67.8%	97
Parental Status	No children under 18	76.3%	70.7%	71.1%	107
	Children under 18	23.7%	29.3%	28.9%	82
Education	High school or less	43.0%	35.7%	36.2%	119
	Some post-secondary	11.7%	11.1%	11.2%	105
	Post-secondary diploma/certificate	20.1%	22.0%	21.9%	92
	University degree	25.2%	31.1%	30.7%	82
Household Income	Under \$20,000	7.3%	5.6%	5.7%	128
	\$20,000 to \$39,999	15.1%	14.4%	14.5%	105
	\$40,000 to \$59,999	16.2%	16.6%	16.5%	98
	\$60,000 to \$79,999	14.9%	15.3%	15.2%	98
	\$80,000 to \$99,999	10.0%	12.4%	12.2%	82
	\$100,000 or more	25.3%	22.6%	22.8%	111
	Not stated	11.1%	13.1%	13.0%	86
Average Household Income		\$72,488	\$72,854	\$72,829	N/A

- 1 - Defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years but did not attend an equestrian or western event on any trip. The number of Equestrian & Western Event Attendees and Non-Attendees equals the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Equestrian & Western Event Attendees in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Equestrian & Western Event Attendees are over or under-represented relative to the average Pleasure Traveler. An index of 100 means the percent participating in the activity is the same as that of the average Canadian Pleasure Traveler. Index values over 100 indicate that those participating in the activity are over-represented relative to the average Canadian Pleasure Traveler. Index values less than 100 indicate that those participating in the activity are under-represented relative to the average Canadian Pleasure Traveler.

Travel Activity (During Last Two Years)

Despite their lower affluence, Equestrian and Western Event Attendees are frequent domestic travelers. They were the 10th most likely of the 21 culture and entertainment activity types to have taken a trip within their own province or region (90.6%), the second most likely to have traveled to an adjacent province or region (62.3%) and the 3rd most likely to have visited a non-adjacent province or region (44.2%) in the past two years. In relative terms, they were especially likely to have traveled in Western Canada and the Northern Territories. Equestrian and Western Event Attendees were also relatively frequent out-of-country travelers. They were the 10th most likely to have visited the United States (59.4%), the 3rd most likely to have visited Mexico (18.7%) and the 8th most likely to have taken a trip to the Caribbean (19.2%). However, they were the second least likely to have traveled overseas (21.3%).

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

	Attended an Equestrian or Western Event	Did Not Attend an Equestrian or Western Event	Pleasure Travelers	Index
Size of Market	1,228,367	17,211,141	18,439,508	100
Canada	97.3%	94.6%	94.8%	103
Took a trip within own province / region	90.6%	85.5%	85.9%	105
Took a trip to an adjacent province / region	62.3%	47.6%	48.6%	128
Took a trip to non-adjacent province / region	44.2%	30.5%	31.4%	141
Newfoundland and Labrador	5.6%	4.2%	4.3%	131
Prince Edward Island	9.0%	7.0%	7.2%	125
New Brunswick	12.8%	11.8%	11.8%	108
Nova Scotia	15.3%	12.5%	12.7%	120
Quebec	33.6%	39.3%	38.9%	86
Ontario	54.2%	53.5%	53.5%	101
Manitoba	15.2%	8.7%	9.2%	166
Saskatchewan	22.2%	10.6%	11.4%	194
Alberta	46.2%	24.4%	25.8%	179
British Columbia	44.2%	29.7%	30.6%	144
Yukon	1.8%	0.9%	1.0%	175
Northwest Territories	1.3%	0.6%	0.7%	204
Nunavut	0.8%	0.3%	0.3%	271
United States	59.4%	50.0%	50.7%	117
Mexico	18.7%	11.9%	12.4%	151
Caribbean	19.2%	15.3%	15.6%	123
All other destinations	21.3%	23.8%	23.6%	90

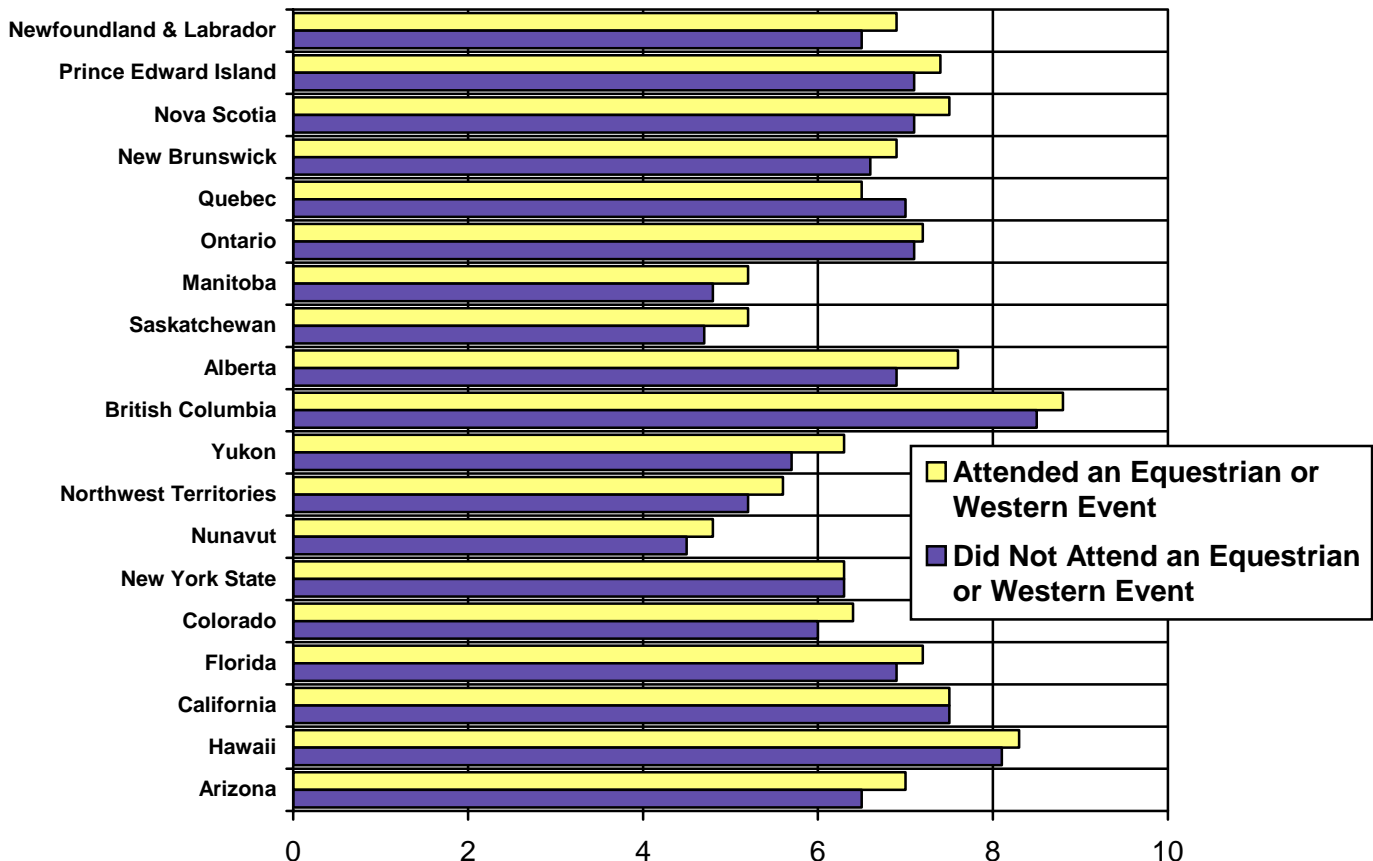
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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

Equestrian and Western Event Attendees perceive Canadian destinations to be more appealing than other Canadian Pleasure Travelers and especially the Western Provinces and the Atlantic Provinces. On the other hand, they have a slightly less positive impression of Quebec than others. British Columbia was considered the most appealing Canadian destination overall.

Equestrian and Western Event Attendees also have a more favourable impression of most of the U.S. reference states and particularly the sun-belt states such as Colorado, Arizona and Florida. Hawaii (8.3) received the highest ratings from this segment.

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



Other Culture and Entertainment Activities Pursued While on Trips

Equestrian and Western Event Attendees very active in many culture and entertainment activities while on trips. They frequently went shopping and dining, visited historical sites, museums and galleries and attended fairs and festivals while traveling. Relative to the average Canadian Pleasure Traveler, they were especially likely to attend fairs and festivals (e.g., musical festivals, comedy festivals, literary & film festivals) and sporting events (e.g., professional sports events, amateur tournaments, national & international sports events). They were also more likely than others to take part in participatory activities while traveling (e.g., agro-tourism; aboriginal cultural experiences, participatory historical activities) and to go gambling in casinos.

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

	Attended an Equestrian or Western Event	Did Not Attend an Equestrian or Western Event	Pleasure Travelers	Index
Size of Market	1,228,367	17,211,141	18,439,508	100
Shopping & Dining	90.9%	82.3%	82.9%	110
Historical Sites, Museums & Art Galleries	76.2%	57.0%	58.3%	131
Fairs & Festivals	74.3%	35.1%	37.7%	197
Musical Concerts, Festivals & Attractions	60.6%	30.8%	32.7%	185
Theme Parks & Exhibits	59.7%	37.7%	39.2%	153
Casinos	48.1%	24.3%	25.9%	186
Wine, Beer & Food Tastings	41.3%	22.6%	23.8%	173
Science & Technology Exhibits	39.3%	22.0%	23.1%	170
Live Theatre	35.7%	20.0%	21.1%	169
Professional Sporting Events	35.0%	14.3%	15.7%	224
Agro-Tourism	32.9%	14.5%	15.7%	210
Garden Theme Attractions	30.4%	16.7%	17.6%	173
Amateur Tournaments	26.4%	10.8%	11.8%	224
Aboriginal Cultural Experiences	26.1%	10.6%	11.6%	225
Comedy Festivals & Clubs	21.2%	9.4%	10.1%	209
High Art Performances	19.4%	10.4%	11.0%	177
Spas	16.1%	9.6%	10.0%	160
Participatory Historical Activities	14.2%	6.2%	6.7%	212
National & International Sporting Events	12.2%	2.6%	3.2%	381
Literary & Film Festivals	6.9%	2.3%	2.6%	269

Culture and Entertainment Activities Pursued in a Typical Year

Equestrian and Western Event Attendees are also quite active in culture and entertainment pursuits while not traveling. They frequently dine in local restaurants, visit local festivals and fairs and attend local amateur sporting events. Relative to the average Canadian Pleasure Traveler, they are especially likely to attend local rodeos, gamble in casinos and stay overnight in a local hotel or B&B.

Fig. 7 Culture and Entertainment Activities Pursued in a Typical Year

	Attended an Equestrian or Western Event	Did Not Attend an Equestrian or Western Event	Pleasure Travelers	Index
Size of Market	1,228,367	17,211,141	18,439,508	100
Going out to eat in restaurants	95.5%	91.2%	91.5%	104
Going to festivals or fairs	77.0%	60.3%	61.4%	125
Going to amateur sporting events	59.3%	40.8%	42.0%	141
Going to pick-your-own farms or farmers' market	53.7%	40.1%	41.0%	131
Going to historic sites or heritage buildings	51.9%	38.4%	39.3%	132
Going to professional sporting events	45.9%	31.1%	32.1%	143
Going to live theatre	42.1%	34.3%	34.8%	121
Going dancing	40.3%	29.1%	29.9%	135
Going to museums	39.9%	32.2%	32.7%	122
Going to zoos or aquariums	39.1%	29.8%	30.4%	128
Going to art galleries or art shows	36.4%	31.4%	31.8%	115
Going to bars with live pop or rock bands	35.8%	27.1%	27.7%	129
Going to amusement or theme parks	35.7%	28.4%	28.9%	124
Going to gamble in casinos	33.0%	17.0%	18.1%	182
Going to rodeos	32.6%	5.5%	7.3%	445
Going to botanical gardens	32.3%	24.9%	25.4%	127
Going to rock music concerts	28.9%	22.0%	22.4%	129
Going to day spas	17.1%	13.5%	13.8%	125
Going to classical music concerts	17.0%	16.5%	16.5%	103
Staying overnight in a hotel or B&B in own city	15.3%	9.5%	9.9%	155
Going to the ballet	8.5%	7.2%	7.3%	117
Going to the opera	7.7%	6.5%	6.6%	116
Going to jazz clubs	7.1%	7.6%	7.5%	95

Outdoor Activities Pursued While on Trips

Equestrian and Western Event Attendees were also quite active in outdoor activities while traveling. They frequently participated in ocean activities (e.g., sunbathing, swimming in ocean) and went wildlife viewing while on trips. Relative to the average Canadian Pleasure Traveler, they were especially likely to go horseback riding and motorcycling and to play teams sports and individual sports (e.g., golf) while on trips. They were also more likely than average to participate in extreme air sports, wilderness activities, freshwater scuba diving and snorkelling and ice skating while on trips.

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

	Attended an Equestrian or Western Event	Did Not Attend an Equestrian or Western Event	Pleasure Travelers	Index
Size of Market	1,228,367	17,211,141	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	60.2%	47.7%	48.5%	124
Wildlife Viewing	59.5%	39.9%	41.2%	144
Boating & Swimming (e.g., motorboating, swimming in lakes)	51.2%	40.4%	41.1%	125
Hiking, Climbing & Paddling	44.7%	33.3%	34.1%	131
Sports & Games (e.g., tennis, board games)	39.0%	21.6%	22.7%	172
Fishing	35.2%	22.8%	23.6%	149
Golfing	30.4%	17.5%	18.3%	166
Exercising & Jogging	26.7%	15.1%	15.9%	168
Team Sports (e.g., hockey, baseball)	22.6%	10.6%	11.4%	199
Skating (e.g., ice skating, rollerblading)	21.5%	11.3%	12.0%	180
Cycling	21.3%	13.0%	13.5%	158
Downhill Skiing & Snowboarding	21.0%	14.2%	14.6%	144
Snowmobiling & ATVing	18.3%	10.8%	11.3%	162
Horseback Riding	17.1%	4.0%	4.9%	349
Cross-country Skiing & Snowshoeing	13.4%	9.0%	9.3%	143
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	9.1%	6.1%	6.3%	144
Hunting	6.6%	4.6%	4.7%	140
Motorcycling	6.0%	2.8%	3.0%	201
Freshwater Scuba & Snorkeling	5.7%	2.8%	3.0%	189
Wilderness Activities (e.g., wilderness skills course)	4.8%	2.2%	2.4%	203
Extreme Air Sports (e.g., parachuting)	2.8%	1.0%	1.1%	252

Outdoor Activities Pursued in a Typical Year

Equestrian and Western Event Attendees are also more active than other Canadian Pleasure Travelers while not traveling. They frequently go on day outings to parks and picnic, swim, exercise, hike and garden at home. Relative to the average Canadian Pleasure Traveler, they are especially likely to go horseback riding, hunting, fishing and camping. However, they are also more likely than others to play golf and to go ATVing and snowmobiling while not traveling.

Fig. 9 Outdoor Activities Pursued in a Typical Year

	Attended an Equestrian or Western Event	Did Not Attend an Equestrian or Western Event	Pleasure Travelers	Index
Size of Market	1,228,367	17,211,141	18,439,508	100
Day outing to a park	73.9%	66.4%	66.9%	110
Swimming	68.0%	59.7%	60.3%	113
Gardening	66.5%	59.3%	59.8%	111
Exercising at home or at a fitness club	66.2%	60.6%	61.0%	109
Picnicking	60.9%	52.5%	53.1%	115
Hiking	55.9%	48.3%	48.8%	115
Camping	48.2%	37.9%	38.6%	125
Cycling	47.2%	44.1%	44.3%	107
Fishing	40.1%	28.5%	29.3%	137
Golfing	38.4%	28.7%	29.4%	131
Sailing or other boating	34.9%	22.6%	23.4%	149
Ice-skating	31.3%	28.3%	28.5%	110
Jogging	28.0%	23.8%	24.1%	116
Playing team sports	27.4%	22.6%	22.9%	119
Canoeing or kayaking	20.4%	16.6%	16.9%	121
Downhill skiing	20.2%	15.9%	16.2%	125
Horseback riding	20.1%	5.9%	6.8%	295
Playing racquet sports (e.g., tennis or badminton)	19.9%	19.1%	19.1%	104
Riding an all-terrain vehicle (ATV)	19.4%	13.9%	14.3%	136
Rollerblading	17.6%	14.1%	14.4%	122
Snowmobiling	13.3%	9.5%	9.8%	136
Cross-country skiing	12.3%	12.5%	12.5%	99
Hunting	11.0%	7.5%	7.7%	142
Snowboarding	6.8%	4.9%	5.0%	135
Skateboarding	2.0%	1.6%	1.6%	123

Accommodation Stayed In While on a Trip

Those who attended an equestrian or western event while on a trip are most likely to have stayed in public or private campgrounds and resorts (e.g., lakeside resort, riverside resort, seaside resort) in the past two years. However, relative to the average Canadian Pleasure Traveler, Equestrian and Western Event Attendees were much more likely to have stayed at a farm or guest ranch or to use a motorhome or recreational vehicle while traveling. They were also particularly more likely than average to have stayed in some of the more unusual types of accommodation including remote or fly-in wilderness lodges or outposts, houseboats and cooking schools.

Fig. 10 Accommodation Stayed in While on Trips

	Attended an Equestrian or Western Event	Did Not Attend an Equestrian or Western Event	Pleasure Travelers	Index
Size of Market	1,228,367	17,211,141	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	40.2%	25.4%	26.4%	153
Lakeside / Riverside Resort	32.1%	21.6%	22.3%	144
A Private Campground	30.3%	18.0%	18.8%	161
Seaside Resort	30.2%	20.1%	20.7%	146
Ski Resort or Mountain Resort	21.0%	13.4%	13.9%	150
A Camp Site in a Wilderness Setting (Not a Campground)	14.1%	8.2%	8.6%	164
Farm or Guest Ranch	12.1%	2.4%	3.0%	397
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	12.0%	3.9%	4.5%	267
Health Spa	9.6%	5.7%	5.9%	162
Wilderness Lodge You Can Drive to by Car	9.1%	5.4%	5.6%	161
Country Inn or Resort with Gourmet Restaurant	8.3%	4.9%	5.1%	163
Remote or Fly-In Wilderness Lodge	3.1%	1.5%	1.6%	194
On a Houseboat	2.9%	1.3%	1.4%	214
Remote or Fly-In Wilderness Outpost	1.3%	0.5%	0.6%	229
Cooking School	0.9%	0.3%	0.4%	255
Wine Tasting School	0.4%	0.2%	0.3%	150

Tours and Cruises Taken During Past Two Years

Equestrian and Western Event Attendees were much more likely than the average Canadian Pleasure Traveler to have taken tours in the past two years. They most often took guided and self-guided sameday tours, scenic countryside drives and city tours. However, they were much more likely than the average Canadian Pleasure Traveler to have taken tours of wineries, factories and casinos and air tours in an airplane or helicopter.

This activity segment was also more likely than average to have taken cruises in the last two years. They were more than twice as likely to have taken a Caribbean cruise and also exhibited an above-average interest in freshwater cruises (e.g., cruises on lakes or rivers).

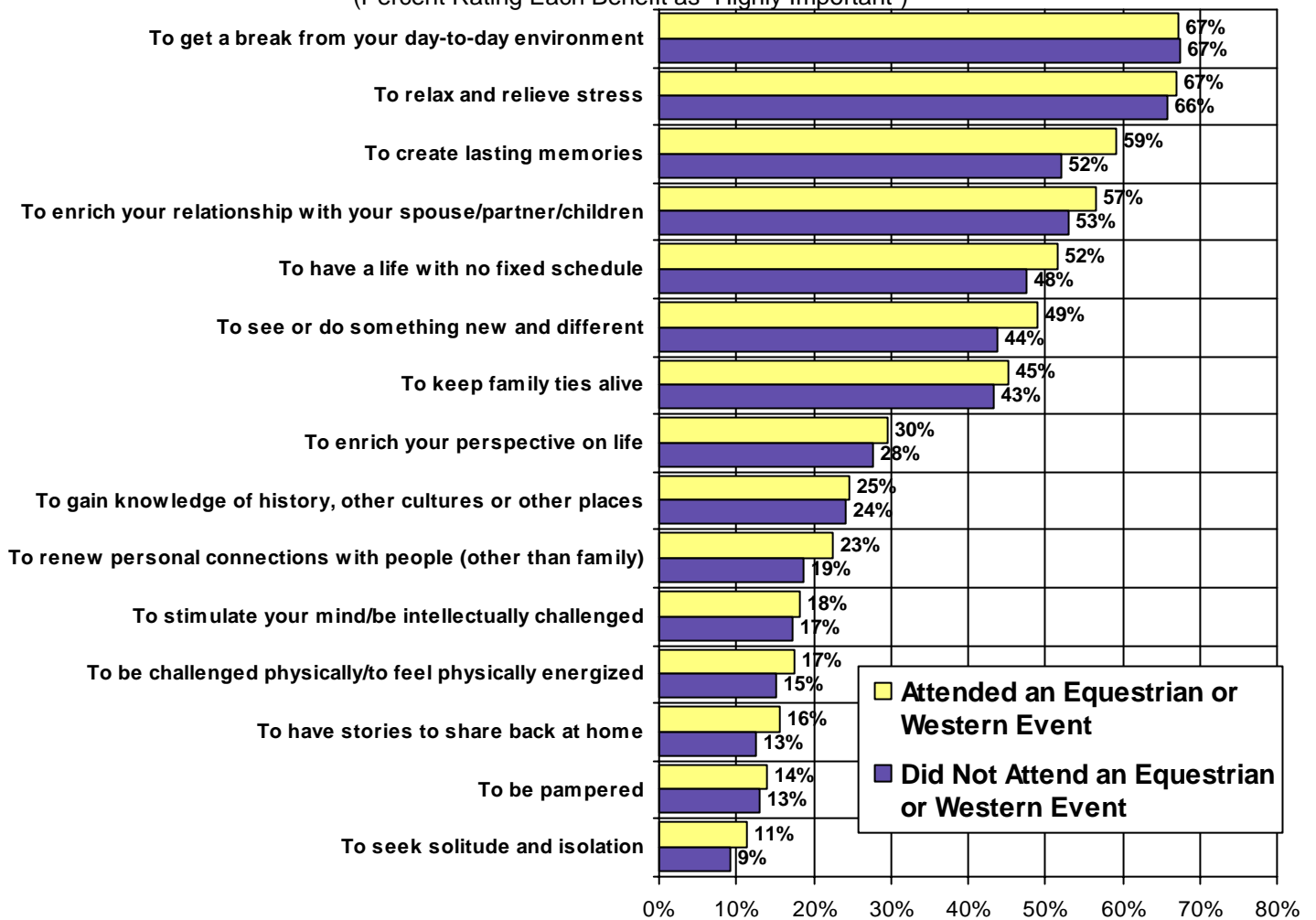
Fig. 11 Tours and Cruises Taken During Past Two Years

	Attended an Equestrian or Western Event	Did Not Attend an Equestrian or Western Event	Pleasure Travelers	Index
Size of Market	1,228,367	17,211,141	18,439,508	100
A self-guided, sameday tour while on an overnight trip	40.4%	28.5%	29.3%	138
Around the countryside - scenic drives	36.2%	21.5%	22.4%	161
Around the city	32.6%	22.7%	23.4%	139
An organized, sameday, guided tour while on an overnight trip	32.0%	21.5%	22.2%	144
A self-guided, overnight tour where you stayed in different locations	26.7%	17.5%	18.1%	148
On the water (sightseeing cruise)	23.7%	12.3%	13.1%	181
Wilderness tour	19.1%	12.6%	13.0%	147
Some other type of tour	16.1%	9.4%	9.8%	164
An organized, overnight, guided tour where you stayed in different locations	15.3%	9.7%	10.1%	152
An organized, overnight, guided tour where you stayed in a single location	14.3%	7.4%	7.8%	183
To a casino	13.7%	6.0%	6.5%	210
Caribbean ocean cruise	11.3%	5.0%	5.4%	209
To a winery	10.3%	5.3%	5.6%	183
To a factory	5.6%	2.4%	2.6%	211
Cruise on another lake or river	5.4%	2.2%	2.4%	225
Ocean cruise – Other	4.7%	3.2%	3.3%	142
In the air as a pilot or passenger of an airplane or helicopter	4.6%	1.7%	1.9%	245
Alaskan ocean cruise	2.7%	1.5%	1.6%	167
Some other type of cruise	2.3%	1.5%	1.6%	143
Cruise on the St. Lawrence River	2.1%	1.9%	1.9%	109
Great Lakes cruise	1.1%	0.8%	0.8%	143
Submarine cruise	0.5%	0.1%	0.1%	345

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travelers, travelers who attended equestrian or western events take vacations in order to get a break from their day-to-day environment, to relax and relieve stress, to create lasting memories, to enrich family relationships and to see or do something new and different. However, Equestrian and Western Event Attendees seek vacations that offer novelty (e.g., allows them to see or do something new and different), create lasting memories and that allow them to reconnect with friends.

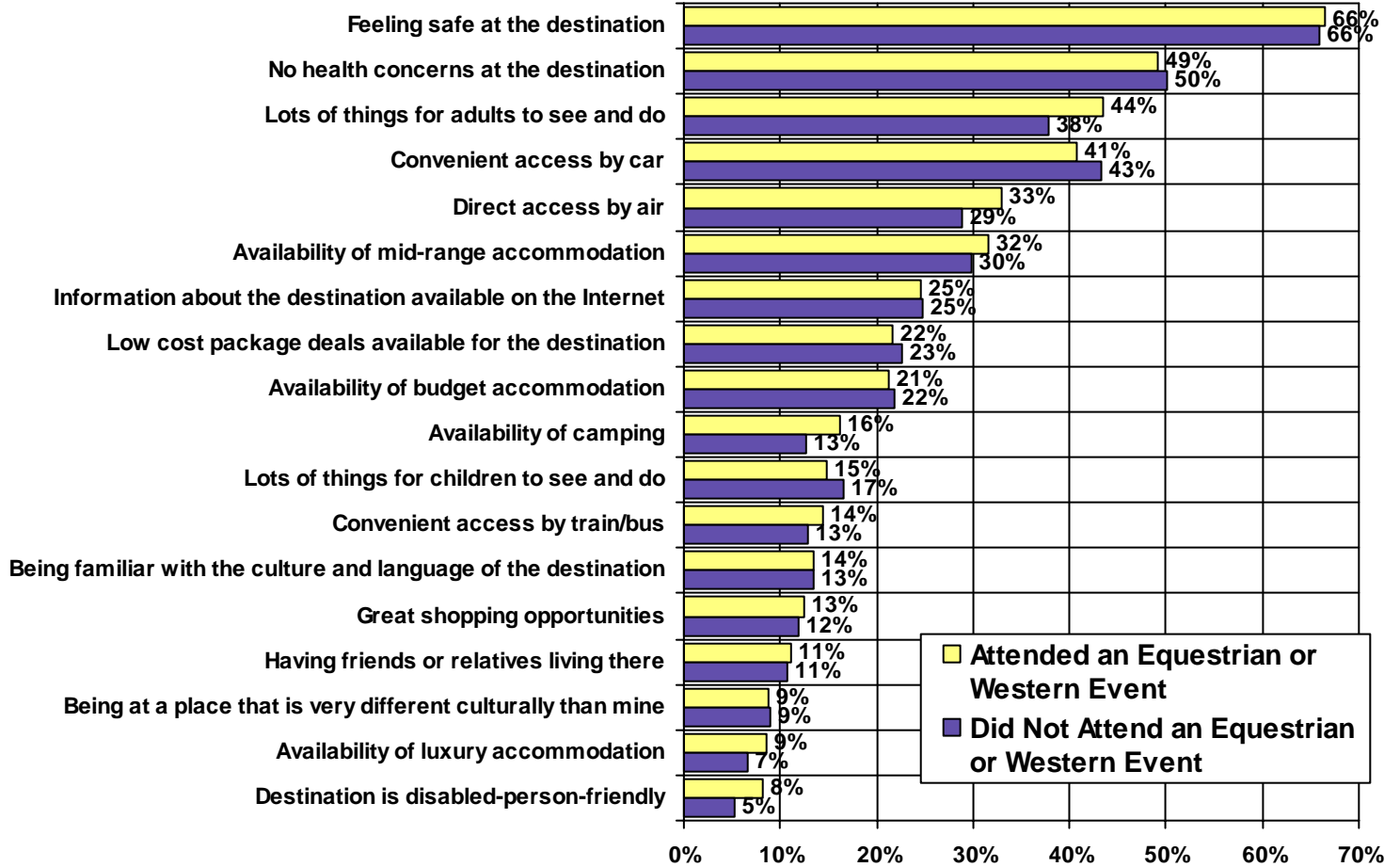
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

Similar to other Canadian Pleasure Travelers, Equestrian and Western Event Attendees consider it important that they feel safe at a destination. However, relative to other Canadian Pleasure Travelers, this activity segment values destinations that offer lots of things for adults to see and do, convenient access by air and the availability of camping.

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



How Destinations are Selected

Similar to the average Canadian Pleasure Traveler, Equestrian and Western Event Attendees start planning vacations with a particular destination in mind. However, this activity segment may be expected to exhibit an above-average interest in vacation travel packages.

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

	Attended an Equestrian or Western Event	Did Not Attend an Equestrian or Western Event	Pleasure Travelers	Index
Size of Market	1,228,367	17,211,141	18,439,508	100
Summer				
Started with a desired destination in mind	49.6%	48.4%	48.5%	102
Started by considering specific activities wanted to do	15.2%	13.7%	13.8%	110
Started with a certain type of vacation experience in mind	22.7%	23.8%	23.7%	96
Looked for packaged deals - no destination in mind	1.8%	1.3%	1.3%	138
Considered something else first	3.1%	4.4%	4.3%	72
Don't know / Other	7.6%	8.5%	8.4%	90
Winter				
Started with a desired destination in mind	49.6%	48.5%	48.6%	102
Started by considering specific activities wanted to do	15.8%	15.6%	15.6%	101
Started with a certain type of vacation experience in mind	17.9%	19.4%	19.3%	93
Looked for packaged deals - no destination in mind	3.8%	3.2%	3.2%	118
Considered something else first	5.3%	4.6%	4.7%	113
Don't know / Other	7.6%	8.7%	8.6%	88

Trip Planning and Information Sources Consulted

The majority of Equestrian and Western Event Attendees were responsible for planning their trips either on their own (44.3%) or with someone else (16.0%). When making vacation plans, Equestrian and Western Event Attendees typically use the Internet, past experiences and word-of-mouth as sources for travel information. However, relative to the average Canadian Pleasure Traveler, this activity segment is especially likely to obtain travel information from programs and advertising on television, travel information received by mail or electronically, visitor information centres and trade, travel or sports shows.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Attended an Equestrian or Western Event	Did Not Attend an Equestrian or Western Event	Pleasure Travelers	Index
Size of Market		1,228,367	17,211,141	18,439,508	100
Who Plans Trips?	Respondent plans trips	44.3%	41.9%	42.0%	105
	Trip planning a shared responsibility	16.0%	16.5%	16.4%	97
	Someone else plans trips	39.7%	41.7%	41.5%	96
Information Sources Consulted	An Internet website	67.2%	65.1%	65.2%	103
	Past experience / Been there before	59.1%	49.8%	50.4%	117
	Advice of others / Word-of-mouth	58.4%	50.6%	51.1%	114
	A travel agent	40.9%	33.6%	34.1%	120
	Maps	37.4%	32.2%	32.6%	115
	Official travel guides or brochures from state / province	34.6%	25.3%	26.0%	133
	Visitor information centres	34.2%	22.6%	23.4%	146
	Articles in newspapers / magazines	28.2%	20.3%	20.9%	135
	An auto club such as CAA	23.9%	17.2%	17.7%	135
	Advertisements in newspapers / magazines	19.2%	13.9%	14.3%	135
	Travel information received in the mail	14.5%	8.4%	8.8%	164
	Travel guide books such as Fodor's	14.2%	13.6%	13.6%	104
	Programs on television	13.5%	7.1%	7.5%	179
	Advertisements on television	9.5%	4.7%	5.0%	191
	Visits to trade, travel or sports shows	9.0%	2.7%	3.1%	288
An electronic newsletter or magazine received by e-mail	6.5%	4.0%	4.2%	156	

Use of the Internet to Plan and Arrange Trips

Relative to the 21 culture and entertainment activity types, those who attended an equestrian or western event are below-average users of the Internet. They were only the 19th most likely to plan travel (63.1%) using the Internet and 17th most likely to have booked travel (42.2%) online. The majority in this segment use hotel or resort websites, the official tourism websites of countries, regions or cities, airline websites and travel planning and booking websites such as Expedia. However, they were more likely than others to have used the websites of cruise lines in the past two years. Those who attended an equestrian or western event most often purchase airline tickets and accommodation online. However, they were more likely than the average Canadian Pleasure Traveler to have purchased tickets for specific activities or attractions and to book car rentals using the Internet.

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

		Attended an Equestrian or Western Event	Did Not Attend an Equestrian or Western Event	Pleasure Travelers	Index
Size of Market		1,228,367	17,211,141	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	36.9%	41.1%	40.8%	90
	Uses Internet to plan trips only	20.9%	22.2%	22.1%	94
	Uses Internet to book part of trip	42.2%	36.7%	37.0%	114
Types of Websites Consulted	A website of a hotel or resort	60.5%	56.7%	57.0%	106
	A tourism website of a country / region / city	53.8%	49.5%	49.8%	108
	An airline website	52.5%	45.9%	46.3%	113
	A travel planning / booking website	50.4%	45.3%	45.7%	110
	A website of an attraction	39.1%	34.1%	34.5%	113
	Some other website	30.9%	27.3%	27.6%	112
	A cruise line website	11.7%	7.8%	8.1%	145
	A motorcoach website	2.6%	2.4%	2.5%	106
Parts of Trips Booked Over The Internet	Air tickets	75.3%	69.0%	69.5%	108
	Accommodation	69.6%	69.1%	69.2%	101
	Car rental	34.4%	26.5%	27.1%	127
	Tickets or fees for specific activities or attractions	30.4%	23.1%	23.6%	128
	Tickets for rail, bus or boat / ship fares	17.3%	15.2%	15.3%	113
	A package containing two or more items	15.3%	15.4%	15.4%	99
	Other	7.4%	3.6%	3.9%	187

Media Consumption Habits

Equestrian and Western Event Attendees are above-average consumers of travel-related media including the travel sections of newspapers, travel magazines, travel websites and travel shows on television. However, this activity segment can be more efficiently reached through sports media (e.g., pro sports magazines, sports and sports shows on television, all-sports radio, sports websites) and country and western radio stations.

Fig. 17 Media Consumption Habits

		Attended an Equestrian or Western Event	Did Not Attend an Equestrian or Western Event	Pleasure Travelers	Index
Size of Market		1,228,367	17,211,141	18,439,508	100
Newspaper Readership	Reads daily newspaper	90.4%	87.0%	87.3%	104
	Reads weekend edition of newspaper	89.9%	87.1%	87.3%	103
	Reads local neighbourhood or community newspapers	68.8%	61.0%	61.5%	112
	Reads other types of newspapers	21.2%	16.9%	17.2%	123
	Frequently or occasionally reads travel section of daily newspaper	57.1%	44.9%	45.7%	125
	Frequently or occasionally reads travel section of weekend newspaper	58.3%	46.6%	47.3%	123
Types of Magazines Read (Top 5 Indexed)	Outdoor activities / sports	21.1%	12.2%	12.8%	165
	Travel (e.g., Condé Nast)	18.7%	11.3%	11.8%	159
	Photography and video	5.9%	3.9%	4.1%	146
	Crafts, antiques and collectibles	17.6%	12.2%	12.5%	140
	Professional sports	11.7%	8.3%	8.5%	138
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	37.9%	29.8%	30.3%	125
	Sports / sports shows	51.6%	42.8%	43.3%	119
	Biography	50.1%	41.8%	42.3%	118
	History	47.0%	41.4%	41.8%	112
	Other television shows	31.6%	28.6%	28.8%	110
Type of Radio Programs Listened To (Top 5 Indexed)	Country music	42.5%	22.5%	23.8%	178
	Oldies (50s, 60s, 70s, 80s)	45.8%	33.7%	34.5%	133
	All sports	14.5%	10.8%	11.1%	131
	Soft music / Adult contemporary	32.4%	25.3%	25.7%	126
	Modern rock / Alternative rock	42.4%	36.7%	37.1%	114
Types of Websites Visited (Top 5 Indexed)	Travel	60.1%	49.9%	50.6%	119
	Sites for specific activities or interests	42.4%	35.4%	35.9%	118
	Sports	31.6%	26.6%	26.9%	117
	Games	37.7%	32.5%	32.8%	115
	Weather	60.0%	55.8%	56.1%	107

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

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

Appendix Two: Canadian TAMS 2006 Outdoor Activity Segmentation

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