

CANADIAN TRAVEL MARKET

Visiting Theme Parks & Exhibits While on Trips Of One or More Nights

A Profile Report

November 6, 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 Theme Parks & Exhibits While on Trips

Executive Summary

Over the last two years, 29.1% (7,221,537) of adult Canadians visited a theme park or exhibit while on an out-of-town, overnight trip of one or more nights. An amusement park (16.1%), a zoo (12.5%) and an aquarium (10.2%) were visited most often on trips. A water theme park (8.0%) was next most popular followed by an entertainment farm (4.9%), a movie theme park (2.7%) and a wax museum (2.7%). Visiting theme parks and exhibits while on trips was the third most frequent culture and entertainment activity type undertaken by Canadian Pleasure Travelers in the past two years. Among those who visited theme parks and exhibits, 34.2% (2,468,951) reported that this activity was the main reason for taking at least one trip.

Relative to the average Canadian Pleasure Traveler, Theme Park and Exhibit Visitors are over-represented among young families. The majority are married and between the ages of 18 to 44. Their level of education (32.8% have a university degree) and household incomes (\$77,092) are somewhat above-average.

The travel activities of those who visited theme parks and exhibits are below-average relative to the other culture and entertainment activity types. They were the 17th most likely of the 21 culture and entertainment activity types to have taken a trip within their own province or region (88.9%), the 16th most likely to have traveled to an adjacent province or region (53.9%) and the 19th most likely to have visited a non-adjacent province or region (34.8%). Their out-of-country travel is also below-average. They were the 13th most likely to have visited the United States (59.1%) and the 18th most likely to have visited Mexico (14.4%) and the Caribbean (15.9%).

Theme Park and Exhibit Visitors pursue active, family-oriented trips. They were more likely than the average Canadian Pleasure Traveler to have visited a wide variety of theme attractions while traveling (e.g. science & technology exhibits, garden theme attractions). They were also more likely to participate in family-oriented activities (e.g., wildlife viewing, sports & games) as well as a variety of sports and physically strenuous activities (e.g., downhill skiing & snowboarding, team sports). They seek vacations that are relaxing, offer lots to see and do for both adults and children and provide opportunities to enrich family relationships.

Relative to the other culture and entertainment activity types, those who visited theme parks and exhibits are average users of the Internet to plan (69.2%) and book (45.1%) trips. However, they are more likely than others to purchase tickets from the websites of specific attractions. This segment may be most effectively targeted through popular television and music media as well as parenting magazines.

Travel Activity and Motivation Survey (TAMS)

The TAMS survey examines the recreational activities and travel habits of Canadians and Americans. The survey examines out-of-town, overnight travel behaviour of one or more nights over the past two years and provides detailed information on Travelers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

TAMS represents a comprehensive assessment of travel behaviour and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada. In particular, TAMS was designed to:

- Identify existing and potential tourism markets;
- Measure the likelihood of these tourism markets being attracted to vacation experiences in Canada;
- Create packaging opportunities for each of these markets;
- Determine how to reach these markets (i.e., in terms of media strategies); and
- Provide information on how to fine-tune and target existing marketing campaigns.

TAMS was sponsored by the following organizations:

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

The survey was conducted in Canada and the United States between January 2006 and June 2006 and it includes only adults (18 years and over). The reference period for the data is 2004 and 2005.

The Canadian database is used in this current report. This survey was conducted by Statistics Canada. 31,699 completed questionnaires were returned. The data have been weighted to project the results to the Canadian population.

This report profiles persons who visited a theme park or exhibit while on a trip and compares them with other Canadian Pleasure Travelers (i.e., those who took at least one pleasure trip or vacation in the last two years). This report is part of a series of 44 Activity Reports prepared using the Canadian TAMS database.

Visiting Theme Parks & Exhibits While on Trips

Market Incidence

Over the last two years, 29.1% of adult Canadians (7,221,537) visited a theme park or exhibit while on an out-of-town, overnight trip of one or more nights. Visiting an amusement park (16.1%), a zoo (12.5%) and an aquarium (10.2%) were the most popular activities. A water theme park (8.0%) was the next most popular venue followed by an entertainment farm (4.9%), a movie theme park (2.7%) and a wax museum (2.7%). Visiting theme parks and exhibits while on trips was the third most frequent culture and entertainment activity type undertaken by Canadian Pleasure Travelers in the past two years.

Of those who visited theme parks and exhibits, 34.2% (2,468,951) reported that this activity was the main reason for taking at least one trip in the past two years. An amusement park and a movie theme park were more likely than other types of parks and exhibits to be reported as being the main reason for taking at least one trip in the last two years.

Fig. 1 Incidence of Visiting Theme Parks & Exhibits While on Trips¹

	Number of Theme Park and Exhibit Visitors ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	7,221,537	2,468,951	18,439,508	24,776,103
Theme Parks & Exhibits (All Activities)	7,221,537	34.2%	39.2%	29.1%
Amusement park	3,996,652	40.5%	21.7%	16.1%
Zoo	3,086,495	26.3%	16.7%	12.5%
Aquarium	2,517,374	15.4%	13.7%	10.2%
Water theme park	1,978,933	30.3%	10.7%	8.0%
Entertainment farm (e.g., corn maze, petting barnyard)	1,204,500	17.0%	6.5%	4.9%
Movie theme park	674,929	32.8%	3.7%	2.7%
Wax museum	674,488	9.5%	3.7%	2.7%
Participated in all seven activities	16,475	12.8%	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 - "Theme Park and Exhibit Visitors" are defined as individuals who visited a theme park or exhibit while on an out-of-town trip of one or more nights during the past two years and who took at least one out-of-town pleasure trip of one or more nights during the past two years. This column reports the number of individuals who participated in the activity on at least one trip during the last two years.
- 3 - This column reports the percent who participated in each activity who stated that the activity was the main reason for taking at least one trip during the past two years.
- 4 - "Pleasure 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

Theme Park and Exhibit Visitors are more likely to live in Alberta. They are least likely to live in Quebec and Ontario.

Fig. 2 Geographic Distribution of Those Who Visited Theme Parks & Exhibits While on Trips

	Total Population	Estimated Number Who Visited Theme Parks & Exhibits on a Trip	Percent of Pleasure Travelers in Region Who Visited Theme Parks & Exhibits on a Trip	Percent of Total Regional Population Who Visited Theme Parks & Exhibits on a Trip
Canada	24,776,103	7,221,537	39.2%	29.1%
Atlantic Provinces	1,822,494	512,700	40.4%	28.1%
Quebec	5,940,869	1,555,438	37.0%	26.2%
Ontario	9,671,592	2,680,031	37.4%	27.7%
Manitoba	843,107	251,981	42.3%	29.9%
Saskatchewan	706,325	223,606	41.3%	31.7%
Alberta	2,465,540	930,829	46.4%	37.8%
British Columbia	3,326,176	1,066,953	40.1%	32.1%

Demographic Profile

Relative to the average Canadian Pleasure Traveler, Theme Park and Exhibit Visitors are over-represented among young families and concentrated among those 18 to 44 years of age. Two-thirds are married and they are more likely to have children living at home than the average traveler. Their level of education (32.4% have a university degree) and household incomes (\$77,092) are slightly above-average.

Fig. 3 Demographic Profile of Theme Park and Exhibit Visitors
Relative to All Canadian Pleasure Travelers

Attribute	Size of Market	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park ¹	Pleasure Travelers	Index ²
		7,221,537	11,217,971	18,439,508	100
Gender	Male	46.4%	50.4%	48.8%	95
	Female	53.6%	49.6%	51.2%	105
Age of Respondent	18 to 24	16.4%	10.5%	12.8%	128
	25 to 34	22.9%	17.0%	19.3%	119
	35 to 44	26.1%	16.9%	20.5%	127
	45 to 54	18.0%	21.8%	20.3%	89
	55 to 64	10.0%	16.8%	14.1%	71
	65 Plus	6.5%	17.0%	12.9%	51
Average Age		40.3	47.3	44.5	N/A
Marital Status	Not married	32.2%	32.2%	32.2%	100
	Married	67.8%	67.8%	67.8%	100
Parental Status	No children under 18	61.5%	77.3%	71.1%	86
	Children under 18	38.5%	22.7%	28.9%	133
Education	High school or less	31.7%	39.2%	36.2%	87
	Some post-secondary	11.3%	11.1%	11.2%	101
	Post-secondary diploma/certificate	24.2%	20.4%	21.9%	111
	University degree	32.8%	29.3%	30.7%	107
Household Income	Under \$20,000	4.8%	6.3%	5.7%	84
	\$20,000 to \$39,999	11.8%	16.2%	14.5%	82
	\$40,000 to \$59,999	16.1%	16.8%	16.5%	97
	\$60,000 to \$79,999	15.9%	14.8%	15.2%	104
	\$80,000 to \$99,999	12.4%	12.1%	12.2%	101
	\$100,000 or more	26.5%	20.5%	22.8%	116
	Not stated	12.5%	13.3%	13.0%	96
Average Household Income		\$77,092	\$70,060	\$72,829	N/A

- 1 - "Non-Theme Park and Exhibit Visitors" are defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years but did not visit a theme park or exhibit on any trip. The numbers of Theme Park and Exhibit Visitors and Non-Theme Park and Exhibit Visitors equal the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Theme Park and Exhibit Visitors in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which visitors 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)

Theme Park and Exhibit Visitors are less frequent travelers than most of the other culture and entertainment types. They were the 17th most likely of the 21 culture and entertainment activity types to have taken a trip within their own province or region (88.9%), the 16th most likely to have traveled to an adjacent province or region (53.9%) and the 19th most likely to have visited a non-adjacent province or region (34.8%). Ontario (54.9%), Quebec (40.4%), British Columbia (35.2%) and Alberta (30.4%) were the most common destinations.

Their out-of-country travel is also below average. They were the 13th most likely to have visited the United States (59.1%) and the 18th most likely to have visited Mexico (14.4%) and the Caribbean (15.9%).

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

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park	Pleasure Travelers	Index
Size of Market	7,221,537	11,217,971	18,439,508	100
Canada	96.5%	93.6%	94.8%	102
Took a trip within own province / region	88.9%	83.9%	85.9%	104
Took a trip to an adjacent province / region	53.6%	45.3%	48.6%	110
Took a trip to non-adjacent province / region	34.8%	29.3%	31.4%	111
Newfoundland and Labrador	4.2%	4.4%	4.3%	97
Prince Edward Island	8.0%	6.6%	7.2%	112
New Brunswick	12.5%	11.4%	11.8%	105
Nova Scotia	13.5%	12.2%	12.7%	107
Quebec	40.4%	37.9%	38.9%	104
Ontario	54.9%	52.6%	53.5%	103
Manitoba	10.7%	8.2%	9.2%	116
Saskatchewan	12.8%	10.5%	11.4%	112
Alberta	30.4%	22.9%	25.8%	117
British Columbia	35.2%	27.7%	30.6%	115
Yukon	0.9%	1.0%	1.0%	95
Northwest Territories	0.7%	0.6%	0.7%	106
Nunavut	0.3%	0.3%	0.3%	107
United States	59.1%	45.2%	50.7%	117
Mexico	14.4%	11.1%	12.4%	116
Caribbean	15.9%	15.4%	15.6%	102
All other destinations	24.5%	23.1%	23.6%	104

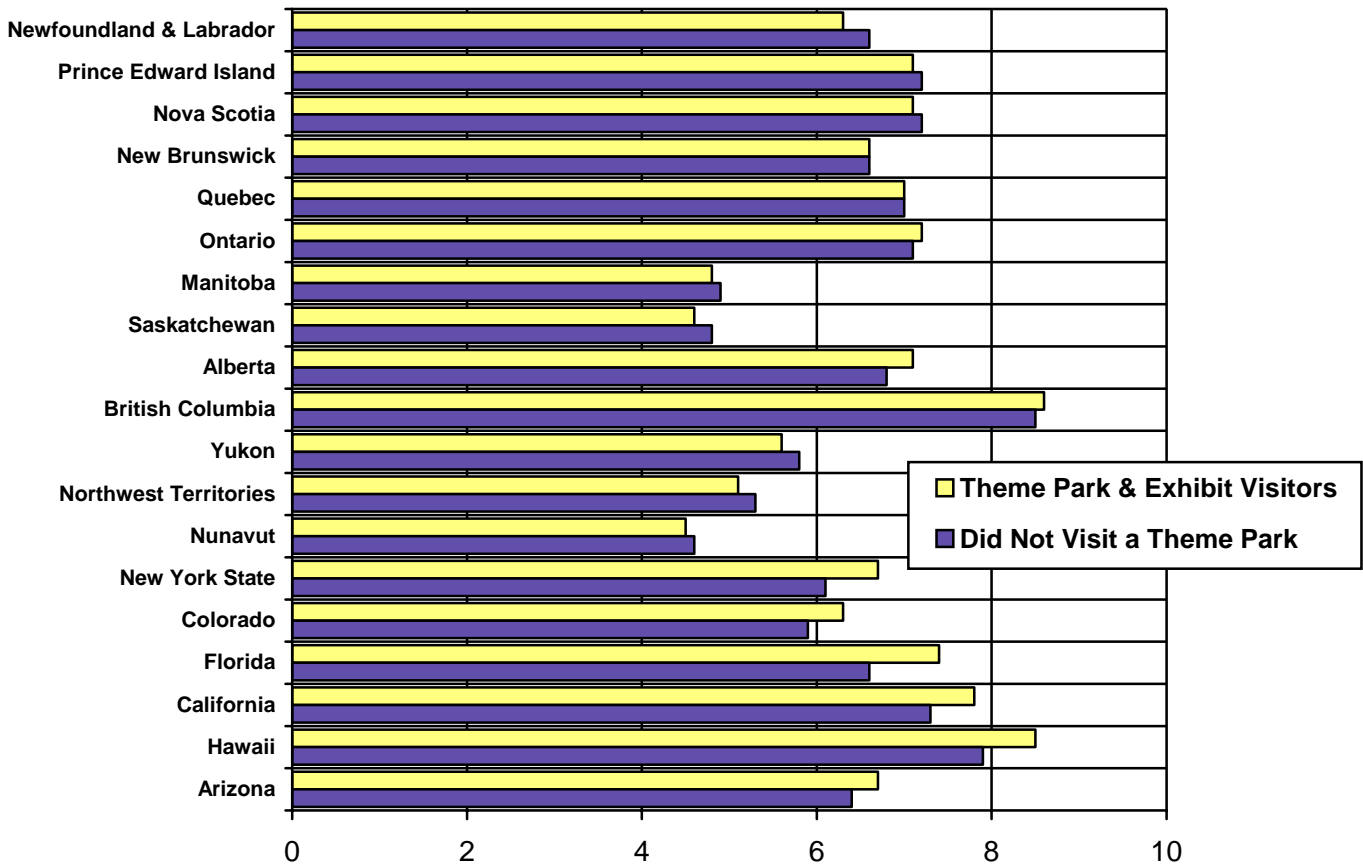
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

The appeal of most Canadian destinations to those who visited theme parks and exhibits is similar to that of the average Canadian Pleasure Traveler. Alberta (where this segment is over-represented), received a slightly more positive appeal rating.

On the other hand, Theme Park and Exhibit Visitors gave higher appeal ratings than other Canadian Pleasure Travelers to all U.S. reference states. This suggests that the United States is perceived as more appealing to this travel segment than to other Canadian Pleasure Travelers.

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

Theme Park and Exhibit Visitors were very active in culture and entertainment pursuits while on a trip. The majority went shopping and dining, visited historical sites, museums and art galleries and attended fairs and festivals while on trips. Relative to the average Canadian Pleasure Traveler, they were especially likely to have visited other theme attractions and exhibits including fairs and festivals, science & technology exhibits, garden theme attractions, agro-tourism, aboriginal cultural experiences and equestrian and western events. They were also more likely than others to have attended sporting events (e.g., professional sports event, amateur tournament, national & international sports event) and live art performances (e.g., live theatre, high art performances, comedy festivals and clubs).

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

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park	Pleasure Travelers	Index
Size of Market	7,221,537	11,217,971	18,439,508	100
Shopping & Dining	91.8%	77.1%	82.9%	111
Historical Sites, Museums & Art Galleries	71.3%	49.9%	58.3%	122
Fairs & Festivals	53.7%	27.4%	37.7%	143
Musical Concerts, Festivals & Attractions	45.5%	24.5%	32.7%	139
Science & Technology Exhibits	38.5%	13.3%	23.1%	166
Casinos	32.1%	21.9%	25.9%	124
Garden Theme Attractions	29.6%	9.9%	17.6%	168
Wine, Beer & Food Tastings	29.5%	20.2%	23.8%	124
Live Theatre	26.9%	17.4%	21.1%	127
Agro-Tourism	23.3%	10.8%	15.7%	148
Professional Sporting Events	22.8%	11.1%	15.7%	146
Amateur Tournaments	17.7%	8.0%	11.8%	150
Aboriginal Cultural Experiences	17.0%	8.1%	11.6%	147
Comedy Festivals & Clubs	16.0%	6.4%	10.1%	158
High Art Performances	15.2%	8.3%	11.0%	138
Spas	14.3%	7.3%	10.0%	142
Equestrian & Western Events	10.2%	4.4%	6.7%	153
Participatory Historical Activities	9.2%	5.0%	6.7%	138
National & International Sporting Events	4.4%	2.5%	3.2%	136
Literary & Film Festivals	4.0%	1.7%	2.6%	154

Culture and Entertainment Activities Pursued in a Typical Year

In relative terms, Theme Park and Exhibit Visitors are somewhat less active in culture and entertainment pursuits while not traveling than when they travel, perhaps reflecting the constraints of younger children. However, they frequently dine in local restaurants and visit local festivals and fairs. Relative to the average Canadian Pleasure Traveler, this activity segment is also especially likely to visit local zoos and aquariums and amusement or theme parks. They are also more likely than others to go dancing and attend live rock music performances (e.g., bars with live pop or rock bands, rock music concerts), stay overnight in local hotels or B&Bs and attend local rodeos.

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

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park	Pleasure Travelers	Index
Size of Market	7,221,537	11,217,971	18,439,508	100
Going out to eat in restaurants	94.3%	89.7%	91.5%	103
Going to festivals or fairs	68.4%	57.0%	61.4%	111
Going to amateur sporting events	48.2%	38.0%	42.0%	115
Going to pick-your-own farms or farmers' market	43.1%	39.6%	41.0%	105
Going to zoos or aquariums	42.6%	22.6%	30.4%	140
Going to amusement or theme parks	42.6%	20.0%	28.9%	148
Going to historic sites or heritage buildings	41.0%	38.2%	39.3%	104
Going to professional sporting events	36.4%	29.3%	32.1%	114
Going to live theatre	35.0%	34.6%	34.8%	101
Going to museums	35.0%	31.3%	32.7%	107
Going dancing	34.9%	26.6%	29.9%	117
Going to bars with live pop or rock bands	33.9%	23.7%	27.7%	122
Going to art galleries or art shows	32.2%	31.5%	31.8%	101
Going to rock music concerts	28.2%	18.8%	22.4%	125
Going to botanical gardens	26.3%	24.8%	25.4%	104
Going to gamble in casinos	18.8%	17.7%	18.1%	104
Going to day spas	16.2%	12.2%	13.8%	118
Going to classical music concerts	15.2%	17.3%	16.5%	92
Staying overnight in a hotel or B&B in own city	12.7%	8.1%	9.9%	128
Going to rodeos	9.4%	6.0%	7.3%	128
Going to jazz clubs	8.8%	6.7%	7.5%	117
Going to the ballet	7.7%	7.0%	7.3%	105
Going to the opera	6.4%	6.7%	6.6%	98

Outdoor Activities Pursued While on Trips

Theme Park and Exhibit Visitors were more likely than the average Canadian Pleasure Traveler to participate in almost all outdoor activities while on a trip. The majority took part in ocean activities (e.g., sunbathing, swimming in ocean) and went wildlife viewing, boating and swimming while on trips. Relative to the average Canadian Pleasure Traveler, they were especially likely to participate in family-oriented activities (e.g., sports & games, cycling, skating, horseback riding) as well as a wide range of more challenging and strenuous activities (e.g., exercising & jogging, downhill skiing & snowboarding, team sports, freshwater scuba diving & snorkeling). They were less likely to go hunting while on trips.

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

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park	Pleasure Travelers	Index
Size of Market	7,221,537	11,217,971	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	61.0%	40.5%	48.5%	126
Wildlife Viewing	55.3%	32.2%	41.2%	134
Boating & Swimming (e.g., motorboating, swimming in lakes)	53.1%	33.4%	41.1%	129
Hiking, Climbing & Paddling	43.7%	27.9%	34.1%	128
Sports & Games (e.g., tennis, board games)	35.7%	14.4%	22.7%	157
Fishing	26.8%	21.5%	23.6%	114
Exercising & Jogging	23.6%	10.9%	15.9%	149
Golfing	21.9%	16.0%	18.3%	120
Downhill Skiing & Snowboarding	21.1%	10.4%	14.6%	145
Cycling	19.8%	9.5%	13.5%	146
Skating (e.g., ice skating, rollerblading)	19.4%	7.2%	12.0%	162
Team Sports (e.g., hockey, baseball)	17.1%	7.7%	11.4%	151
Snowmobiling & ATVing	15.1%	8.9%	11.3%	133
Cross-country Skiing & Snowshoeing	12.1%	7.5%	9.3%	130
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	8.3%	5.0%	6.3%	132
Horseback Riding	7.5%	3.2%	4.9%	153
Freshwater Scuba & Snorkeling	4.7%	1.9%	3.0%	157
Wilderness Activities (e.g., wilderness skills course)	4.2%	1.2%	2.4%	176
Hunting	4.2%	5.1%	4.7%	88
Motorcycling	3.3%	2.8%	3.0%	112
Extreme Air Sports (e.g., parachuting)	1.8%	0.7%	1.1%	162

Outdoor Activities Pursued in a Typical Year

Theme Park and Exhibit Visitors are more likely than the average Canadian Pleasure Traveler to participate in most outdoor activities while not traveling. They frequently go on day outings to parks and picnicking, swim, hike, cycle, exercise and garden at home. Relative to the average Canadian Pleasure Traveler, those who went to theme parks and exhibits are especially likely to participate in physically strenuous activities including “board & blade” activities (e.g., skating, rollerblading, skateboarding), jogging, team sports, racquet sports, and downhill skiing and snowboarding. They are less likely than others to go hunting.

Fig. 9 Outdoor Activities Pursued in a Typical Year

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park	Pleasure Travelers	Index
Size of Market	7,221,537	11,217,971	18,439,508	100
Day outing to a park	74.8%	61.8%	66.9%	112
Swimming	69.3%	54.4%	60.3%	115
Exercising at home or at a fitness club	66.0%	57.7%	61.0%	108
Gardening	60.2%	59.5%	59.8%	101
Picnicking	59.5%	48.9%	53.1%	112
Hiking	54.3%	45.2%	48.8%	111
Cycling	51.7%	39.6%	44.3%	117
Camping	46.0%	33.8%	38.6%	119
Ice-skating	37.6%	22.6%	28.5%	132
Golfing	31.7%	27.9%	29.4%	108
Jogging	30.7%	19.8%	24.1%	128
Fishing	30.2%	28.7%	29.3%	103
Playing team sports	29.7%	18.6%	22.9%	129
Sailing or other boating	26.1%	21.7%	23.4%	111
Playing racquet sports (e.g., tennis or badminton)	24.6%	15.6%	19.1%	128
Downhill skiing	20.4%	13.5%	16.2%	126
Rollerblading	20.1%	10.7%	14.4%	140
Canoeing or kayaking	19.8%	15.0%	16.9%	117
Riding an all-terrain vehicle (ATV)	16.6%	12.8%	14.3%	116
Cross-country skiing	13.5%	11.8%	12.5%	108
Snowmobiling	12.2%	8.2%	9.8%	125
Horseback riding	9.0%	5.4%	6.8%	132
Snowboarding	7.7%	3.4%	5.0%	152
Hunting	6.8%	8.4%	7.7%	88
Skateboarding	2.1%	1.3%	1.6%	132

Accommodation Stayed In While on a Trip

Theme Park and Exhibit Visitors were most likely to have stayed in public and private campgrounds and resorts (e.g., lakeside or riverside resorts, seaside resorts, ski or mountain resorts). Relative to the average Canadian Pleasure Traveler, they were especially likely to have stayed in public campgrounds and ski or mountain resorts. They were also more likely to have stayed at some of the more unusual accommodation types including farms or guest ranches, houseboats, wilderness lodges and health spas.

Fig. 10 Accommodation Stayed in While on Trips

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park	Pleasure Travelers	Index
Size of Market	7,221,537	11,217,971	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	36.2%	20.0%	26.4%	137
Lakeside / Riverside Resort	28.2%	18.5%	22.3%	126
Seaside Resort	25.4%	17.7%	20.7%	122
A Private Campground	24.4%	15.2%	18.8%	130
Ski Resort or Mountain Resort	19.5%	10.4%	13.9%	140
A Camp Site in a Wilderness Setting (Not a Campground)	10.9%	7.1%	8.6%	127
Health Spa	8.0%	4.6%	5.9%	135
Wilderness Lodge You Can Drive to by Car	7.6%	4.3%	5.6%	136
Country Inn or Resort with Gourmet Restaurant	6.5%	4.2%	5.1%	127
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	5.7%	3.7%	4.5%	127
Farm or Guest Ranch	4.3%	2.2%	3.0%	141
Remote or Fly-In Wilderness Lodge	2.2%	1.2%	1.6%	135
On a Houseboat	1.9%	1.0%	1.4%	139
Remote or Fly-In Wilderness Outpost	0.7%	0.5%	0.6%	118
Cooking School	0.5%	0.2%	0.4%	152
Wine Tasting School	0.2%	0.3%	0.3%	79

Tours and Cruises Taken During Past Two Years

Theme Park and Exhibit Visitors were also more likely than others to have taken tours and cruises in the last two years. They most frequently took sameday tours (both guided and self-guided), city tours and scenic drives in the countryside. Relative to the average Canadian Pleasure Traveler, they were especially likely to have taken self-guided, overnight, multi-location tours, wilderness tours and factory tours in the last two years. Theme Park and Exhibit Visitors were also more likely to have taken freshwater cruises (e.g., Great Lakes cruise, cruises on lakes and rivers). However, they were no more likely than the average Canadian Pleasure Traveler to have taken ocean cruises (e.g., Caribbean cruise, Alaskan cruise).

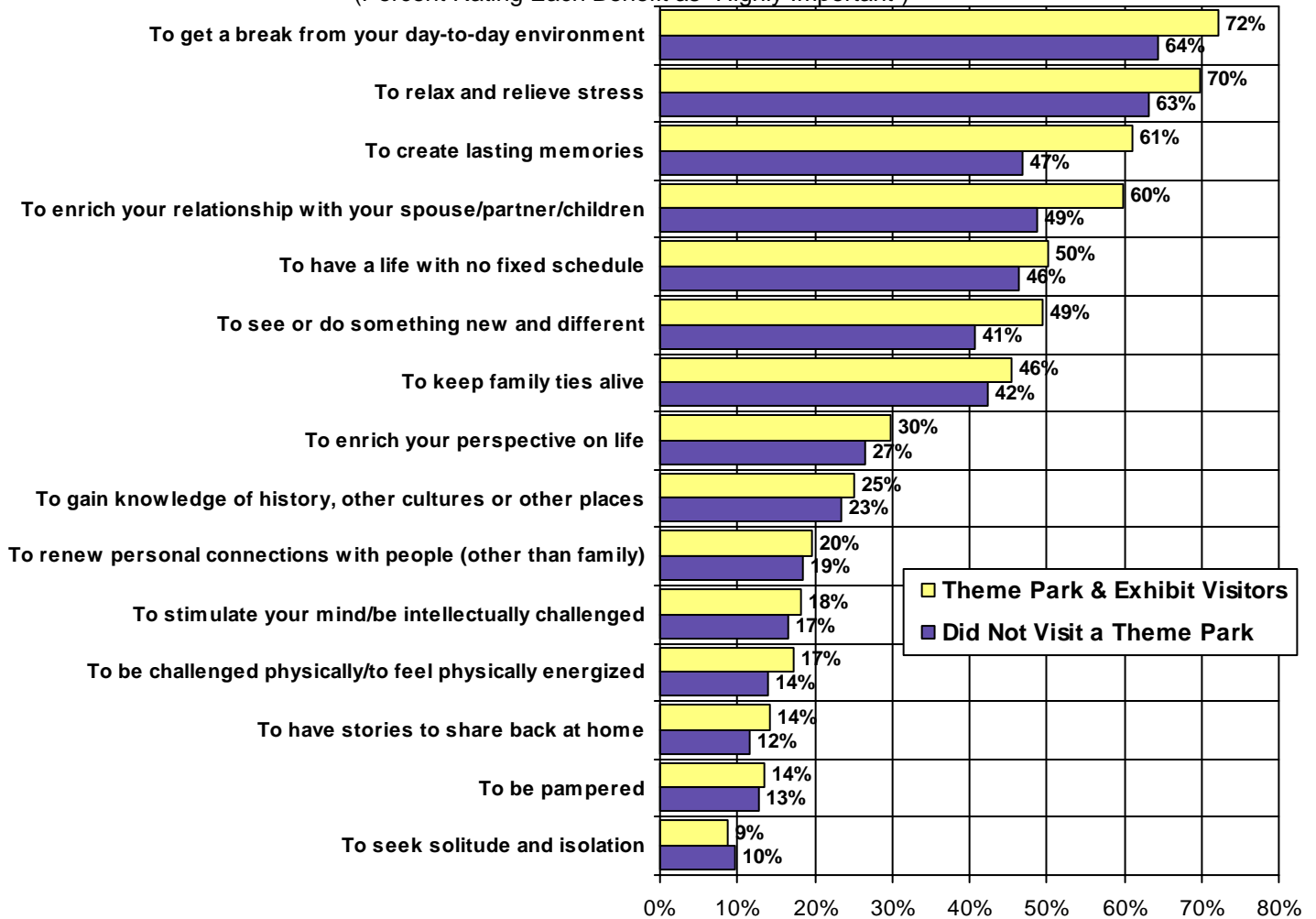
Fig. 11 Tours and Cruises Taken During Past Two Years

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park	Pleasure Travelers	Index
Size of Market	7,221,537	11,217,971	18,439,508	100
A self-guided, sameday tour while on an overnight trip	37.1%	24.3%	29.3%	127
Around the city	29.4%	19.5%	23.4%	126
An organized, sameday, guided tour while on an overnight trip	28.5%	18.2%	22.2%	128
Around the countryside - scenic drives	27.6%	19.1%	22.4%	123
A self-guided, overnight tour where you stayed in different locations	23.6%	14.6%	18.1%	130
Wilderness tour	17.7%	10.0%	13.0%	136
On the water (sightseeing cruise)	17.6%	10.2%	13.1%	134
Some other type of tour	13.6%	7.4%	9.8%	139
An organized, overnight, guided tour where you stayed in different locations	11.5%	9.2%	10.1%	114
An organized, overnight, guided tour where you stayed in a single location	9.1%	7.0%	7.8%	116
To a casino	8.4%	5.3%	6.5%	128
To a winery	7.1%	4.7%	5.6%	126
Caribbean ocean cruise	5.9%	5.1%	5.4%	109
To a factory	4.1%	1.7%	2.6%	155
Ocean cruise – Other	3.4%	3.3%	3.3%	103
Cruise on another lake or river	2.9%	2.0%	2.4%	122
In the air as a pilot or passenger of an airplane or helicopter	2.4%	1.6%	1.9%	127
Cruise on the St. Lawrence River	2.3%	1.7%	1.9%	119
Some other type of cruise	2.2%	1.2%	1.6%	136
Alaskan ocean cruise	1.5%	1.7%	1.6%	94
Great Lakes cruise	1.1%	0.6%	0.8%	139
Submarine cruise	0.2%	0.1%	0.1%	169

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travelers, those who visited a theme park or exhibit take vacations to get a break from their day-to-day environment, to relax and relieve stress and to live without a fixed schedule. However, relative to other Canadian Pleasure Travelers, Theme Park and Exhibit Visitors consider it more importance that a vacation is relaxing, creates lasting memories and enriches family relationships. They also prefer vacations that offer opportunities to see or do something new and different.

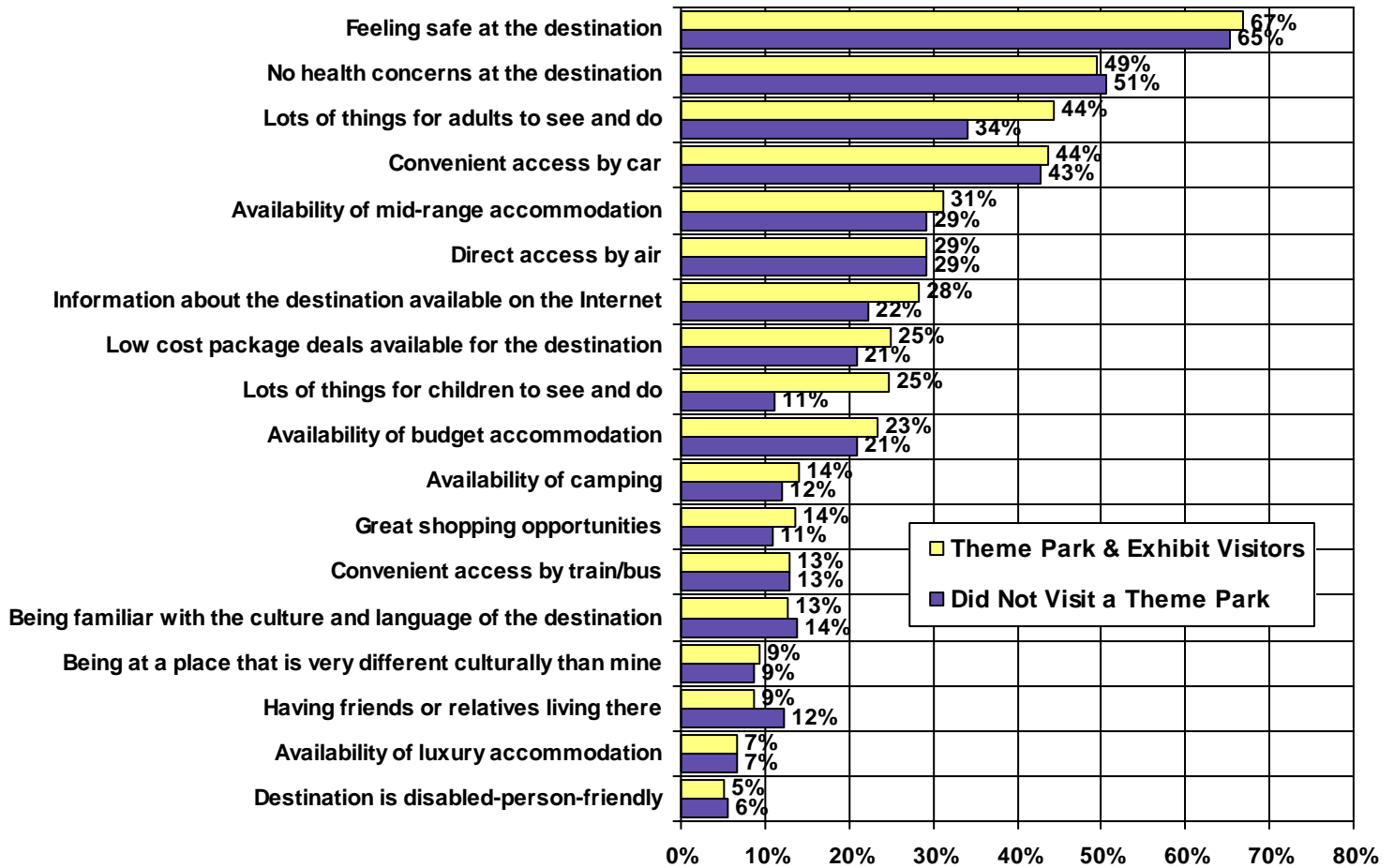
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, the majority of Theme Park and Exhibit Visitors consider it important to feel safe at a destination. However, relative to other Canadian Pleasure Travelers, Theme Park and Exhibit Visitors are more likely to consider it important that a destination has lots of things to see and do for both adults and children.

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



How Destinations are Selected

Similar to the average Canadian Pleasure Traveler, Theme Park and Exhibit Visitors tend to start trip planning with a particular destination in mind. They are next most likely to select a trip destination with a certain type of vacation experience in mind. For the most part, the ways in which destinations are selected by this activity segment parallel those of the typical Canadian Pleasure Traveler. However, this activity segment may be slightly more responsive to discount travel packages for summer travel.

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

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park	Pleasure Travelers	Index
Size of Market	7,221,537	11,217,971	18,439,508	100
Summer				
Started with a desired destination in mind	47.3%	49.3%	48.5%	98
Started by considering specific activities wanted to do	15.0%	13.0%	13.8%	108
Started with a certain type of vacation experience in mind	24.7%	23.0%	23.7%	104
Looked for packaged deals - no destination in mind	1.7%	1.1%	1.3%	128
Considered something else first	4.7%	4.1%	4.3%	108
Don't know / Other	6.7%	9.6%	8.4%	79
Winter				
Started with a desired destination in mind	46.4%	50.3%	48.6%	95
Started by considering specific activities wanted to do	18.1%	13.7%	15.6%	116
Started with a certain type of vacation experience in mind	20.9%	18.1%	19.3%	108
Looked for packaged deals - no destination in mind	3.3%	3.2%	3.2%	102
Considered something else first	3.9%	5.3%	4.7%	83
Don't know / Other	7.5%	9.5%	8.6%	86

Trip Planning and Information Sources Consulted

The majority of Theme Park and Exhibit Visitors were responsible for planning their trips either on their own (42.8%) or with someone else (15.6%). When making vacation plans, Theme Park and Exhibit Visitors typically consult a wider variety of sources than the average Canadian Pleasure Traveler. The majority use the Internet, word-of-mouth and past experiences to plan travel. However, Theme Park and Exhibit Visitors are more likely than others to obtain trip planning information from television programs and television advertising, official travel guides or brochures and visitor information centres, electronic newsletters and trade, travel and sports shows.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Theme Park and Exhibit Visitors	Did Not Visit a Theme Park	Pleasure Travelers	Index
	Size of Market	7,221,537	11,217,971	18,439,508	100
Who Plans Trips?	Respondent plans trips	42.8%	41.5%	42.0%	102
	Trip planning a shared responsibility	15.6%	17.0%	16.4%	95
	Someone else plans trips	41.6%	41.5%	41.5%	100
Information Sources Consulted	An Internet website	74.0%	59.3%	65.2%	113
	Advice of others / Word-of-mouth	59.2%	45.7%	51.1%	116
	Past experience / Been there before	55.9%	46.7%	50.4%	111
	A travel agent	37.4%	31.9%	34.1%	110
	Maps	36.6%	29.8%	32.6%	112
	Official travel guides or brochures from state / province	32.2%	21.7%	26.0%	124
	Visitor information centres	29.6%	19.1%	23.4%	127
	Articles in newspapers / magazines	24.8%	18.2%	20.9%	119
	An auto club such as CAA	21.1%	15.3%	17.7%	119
	Advertisements in newspapers / magazines	17.2%	12.3%	14.3%	120
	Travel guide books such as Fodor's	16.2%	11.9%	13.6%	119
	Travel information received in the mail	11.2%	7.2%	8.8%	127
	Programs on television	10.3%	5.6%	7.5%	138
	Advertisements on television	7.1%	3.5%	5.0%	143
	An electronic newsletter or magazine received by e-mail	5.4%	3.3%	4.2%	129
Visits to trade, travel or sports shows	4.2%	2.4%	3.1%	134	

Use of the Internet to Plan and Arrange Trips

Theme Park and Exhibit Visitors are more likely than the average Canadian Pleasure Traveler to use the Internet to plan (69.2%) and book (45.1%) trips. The majority use hotel or resort websites and the official tourism websites of countries, regions or cities. However, relative to other Canadian Pleasure Travelers, those who visited theme parks and exhibits are especially likely to use the websites of specific attractions to research travel and purchase tickets. This suggests that those who visit theme parks and exhibits may be especially likely to purchase tickets to exhibits online before they travel.

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

		Theme Park and Exhibit Visitors	Did Not Visit a Theme Park	Pleasure Travelers	Index
	Size of Market	7,221,537	11,217,971	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	30.8%	47.3%	40.8%	75
	Uses Internet to plan trips only	24.1%	20.8%	22.1%	109
	Uses Internet to book part of trip	45.1%	31.9%	37.0%	122
Types of Websites Consulted	A website of a hotel or resort	60.7%	53.9%	57.0%	106
	A tourism website of a country / region / city	52.6%	47.4%	49.8%	106
	A travel planning/booking website	49.9%	42.1%	45.7%	109
	An airline website	47.6%	45.3%	46.3%	103
	A website of an attraction	44.1%	26.3%	34.5%	128
	Some other website	28.4%	26.9%	27.6%	103
	A cruise line website	9.0%	7.3%	8.1%	112
	A motorcoach website	2.6%	2.3%	2.5%	105
Parts of Trips Booked Over The Internet	Accommodation	73.3%	65.4%	69.2%	106
	Air tickets	70.3%	68.7%	69.5%	101
	Car rental	29.3%	25.1%	27.1%	108
	Tickets or fees for specific activities or attractions	29.1%	18.7%	23.6%	123
	Tickets for rail, bus or boat/ship fares	17.0%	13.8%	15.3%	111
	A package containing two or more items	16.7%	14.3%	15.4%	108
	Other	3.9%	4.0%	3.9%	99

Media Consumption Habits

Theme Park and Exhibit Visitors are slightly more likely than the average Canadian Pleasure Traveler to read the travel sections of daily and weekend newspapers and to visit travel websites. However, relative to the other culture and entertainment activity types, this segment is a below-average user of travel media. This family-oriented segment may be more effectively targeted through popular television entertainment (e.g., reality television shows, music video shows). They may also be reached through family and parenting magazines and top 40 or current hits radio stations.

Fig. 17 Media Consumption Habits

		Theme Park and Exhibit Visitors	Did Not Visit a Theme Park	Pleasure Travelers	Index
Size of Market		7,221,537	11,217,971	18,439,508	100
Newspaper Readership	Reads daily newspaper	87.7%	87.0%	87.3%	100
	Reads weekend edition of newspaper	87.5%	87.1%	87.3%	100
	Reads local neighbourhood or community newspapers	63.0%	60.6%	61.5%	102
	Reads other types of newspapers	17.9%	16.7%	17.2%	104
	Frequently or occasionally reads travel section of daily newspaper	48.2%	44.1%	45.7%	105
	Frequently or occasionally reads travel section of weekend newspaper	49.9%	45.7%	47.3%	105
Types of Magazines Read (Top 5 Indexed)	Family and parenting	13.1%	6.0%	8.8%	149
	Photography and video	5.2%	3.3%	4.1%	129
	Entertainment and music	39.5%	27.9%	32.4%	122
	Computers, electronics and technology	12.3%	9.2%	10.4%	118
	Fashion and beauty	27.6%	21.2%	23.7%	116
Type of Television Programs Watched (Top 5 Indexed)	Reality shows (e.g., Canadian Idol)	47.3%	35.0%	39.8%	119
	Music / Music video shows / channels	29.4%	23.0%	25.5%	115
	Late night talk shows	29.9%	25.9%	27.5%	109
	Dramas (e.g., Law & Order)	62.3%	54.0%	57.3%	109
	Science fiction / Fantasy shows	20.8%	18.2%	19.2%	108
Type of Radio Programs Listened To (Top 5 Indexed)	Top 40 / Current hits	32.2%	20.7%	25.2%	128
	Modern rock / Alternative rock	45.2%	31.9%	37.1%	122
	All sports	11.6%	10.7%	11.1%	105
	Multicultural	8.7%	8.2%	8.4%	104
	Country music	24.6%	23.4%	23.8%	103
Types of Websites Visited (Top 5 Indexed)	Entertainment	59.2%	45.8%	51.5%	115
	Shopping (all types)	38.1%	30.1%	33.5%	114
	Travel	56.7%	46.0%	50.6%	112
	Games	36.4%	30.2%	32.8%	111
	Magazine sites	17.9%	15.6%	16.6%	108

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

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	