

CANADIAN TRAVEL MARKET

Horseback Riding While on Trips Of One or More Nights

A Profile Report

October 24, 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



Horseback Riding While on Trips

Executive Summary

Over the last two years, 3.6% (904,309) of adult Canadians went horseback riding while on an out-of-town, overnight trip of one or more nights. Horseback riding was the 16th most common outdoor activity pursued by Canadian Pleasure Travelers during this time. More adult Canadians went horseback riding as a sameday excursion (3.5%) than as an overnight riding trip (0.3%). Of those who went horseback riding, only 19.8% (179,400) reported that this activity was the main reason for taking a trip. Therefore, most travelers typically include horseback riding as only one of many activities undertaken while on trips.

Horseback Riders are more likely to be female (57.7%) than any of the other 21 outdoor activity types. Horseback Riders are over-represented among Young Singles, Young Couples and Mature Singles. They are moderately affluent with a level of education (34.9% have a university degree) and household income (\$77,800) that is somewhat above-average. They are especially over-represented in Alberta.

Horseback Riders were the 2nd most likely of the 21 outdoor activity types to have taken a trip to an adjacent province or region (61.8%). However, they were only the 14th most likely to have traveled within their own province or region (94.6%) and the 9th most likely to have traveled to a non-adjacent province or region (38.3%) in the past two years. They were more likely than average to have visited the western provinces and the northern territories. In terms of out-of-country travel, Horseback Riders were the second most likely to have taken a trip to the Caribbean (28.2%), the 9th most likely to have visited Mexico (18.5%) and the 6th most likely to have visited the United States (59.2%).

Relative to the average Canadian Pleasure Traveler, Horseback Riders were very active in both outdoor activities and culture and entertainment pursuits while on trips. They were especially likely to participate in physically strenuous outdoor activities while on trips (e.g., downhill skiing & snowboarding, cycling) as well as nature-based activities (e.g., wilderness activities, hiking, climbing and paddling, wilderness tours). They exhibit above-average interest in equestrian and western events and rodeos, but are also frequent patrons of literary and film festivals, live art performances and participatory cultural activities (e.g., aboriginal cultural experiences). They seek vacations that offer novelty, intellectual stimulation, physical stimulation and opportunities to relax and relieve stress.

Horseback Riders are among the heaviest users of the Internet to plan (77.6%) and book trips (54.2%). They are avid consumers of travel-related media and may also be effectively targeted through country and western and popular music media.

Horseback Riding While on Trips

Market Incidence

Over the last two years, 3.6% (904,309) of adult Canadians went horseback riding while on an out-of-town, overnight trip of one or more nights. Horseback riding was the 16th most common outdoor activity pursued by Canadian Pleasure Travelers during this time. 3.5% reported going horseback riding as a sameday excursion and 0.3% went horseback riding with an overnight stop.

Of those who went horseback riding, only 19.8% (179,400) reported that this activity was the main reason for taking at least one trip in the past two years. Rather, most include horseback riding as only one of many activities undertaken during active trips. Those who went horseback riding with an overnight stop (43.0%) were much more likely than those who went riding as a sameday excursion (19.2%) to report that this activity was the main reason for taking at least one trip over the course of the last two years.

Fig. 1 Incidence of Horseback Riding While on Trips¹

	Number of Horseback Riders ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total Canadian Population ⁵
Size of Market	904,309	179,400	18,439,508	24,776,103
Horseback Riding (All Activities)	904,309	19.8%	4.9%	3.6%
Horseback riding as a sameday excursion	870,585	19.2%	4.7%	3.5%
Horseback riding with an overnight stop	69,507	43.0%	0.4%	0.3%
Participated in both activities	35,783	48.9%	0.2%	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 - "Horseback Riders" are defined as individuals who went horseback riding 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

Horseback Riders are most likely to live in Alberta. They are least likely to live in Quebec and the Atlantic Provinces.

Fig. 2 Geographic Distribution of Those Who Go Horseback Riding While on Trips

	Total Population	Estimated Number Who Went Horseback Riding on a Trip	Percent of Pleasure Travelers in Region Who Went Horseback Riding on a Trip	Percent of Total Regional Population Who Went Horseback Riding on a Trip
Canada	24,776,103	904,309	4.9%	3.6%
Atlantic Provinces	1,822,494	46,758	3.7%	2.6%
Quebec	5,940,869	159,465	3.8%	2.7%
Ontario	9,671,592	339,698	4.7%	3.5%
Manitoba	843,107	27,277	4.6%	3.2%
Saskatchewan	706,325	28,445	5.3%	4.0%
Alberta	2,465,540	151,240	7.5%	6.1%
British Columbia	3,326,176	151,425	5.7%	4.6%

Demographic Profile

Horseback Riders are more likely to be female (57.7%) than any of the other 21 outdoor activity types. Relative to the average Canadian Pleasure Traveler, they are over-represented among those 18 to 44 years of age and married with children under 18 living at home. They are moderately affluent with a level of education (34.9% have a university degree) and household income (\$77,800) that is somewhat above-average.

Fig. 3 Demographic Profile of Horseback Riders Relative to All Canadian Pleasure Travelers

Attribute	Size of Market	Went Horseback Riding	Did Not Go Horseback Riding ¹	Pleasure Travelers	Index ²
		904,309	17,535,200	18,439,508	100
Gender	Male	42.3%	49.2%	48.8%	87
	Female	57.7%	50.8%	51.2%	113
Age of Respondent	18 to 24	18.2%	12.5%	12.8%	142
	25 to 34	23.7%	19.1%	19.3%	123
	35 to 44	24.7%	20.3%	20.5%	120
	45 to 54	22.4%	20.2%	20.3%	110
	55 to 64	7.3%	14.5%	14.1%	51
	65 Plus	3.8%	13.4%	12.9%	29
Average Age		38.8	44.8	44.5	N/A
Marital Status	Not married	36.1%	32.0%	32.2%	112
	Married	63.9%	68.0%	67.8%	94
Parental Status	No children under 18	67.1%	71.3%	71.1%	94
	Children under 18	32.9%	28.7%	28.9%	114
Education	High school or less	29.2%	36.6%	36.2%	81
	Some post-secondary	11.5%	11.2%	11.2%	103
	Post-secondary diploma/certificate	24.3%	21.8%	21.9%	111
	University degree	34.9%	30.5%	30.7%	114
Household Income	Under \$20,000	6.0%	5.7%	5.7%	106
	\$20,000 to \$39,999	11.4%	14.6%	14.5%	79
	\$40,000 to \$59,999	13.2%	16.7%	16.5%	80
	\$60,000 to \$79,999	15.3%	15.2%	15.2%	100
	\$80,000 to \$99,999	13.2%	12.2%	12.2%	108
	\$100,000 or more	27.1%	22.6%	22.8%	119
	Not stated	13.8%	13.0%	13.0%	106
Average Household Income		\$77,800	\$72,575	\$72,829	N/A

- 1 - "Did Not Go Horseback Riding" is defined as individuals who took at least one out-of-town, overnight pleasure trip of one or more nights in the last two years but did not go horseback riding on any trip. The number of Horseback Riders and Non-Horseback Riders equals the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Horseback Riders in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Horseback Riders 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)

Almost all Horseback Riders (97.9%) took a trip within Canada during the past two years. Horseback Riders were the 2nd most likely of the 21 outdoor activity types to have taken a trip to an adjacent province or region (61.8%). However, they were only the 14th most likely to have traveled within their own province or region (94.6%) and the 9th most likely to have traveled to a non-adjacent province or region (38.3%) in the past two years. They were more likely than average to have visited the western provinces and the northern territories.

In terms of out-of-country travel, Horseback Riders were the second most likely to have taken a trip to the Caribbean (28.2%), the 9th most likely to have visited Mexico (18.5%) and the 6th most likely to have visited the United States (59.2%).

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

	Went Horseback Riding	Did Not Go Horseback Riding	Pleasure Travelers	Index
Size of Market	904,309	17,535,200	18,439,508	100
Canada	97.9%	94.6%	94.8%	103
Took a trip within own province / region	92.4%	85.5%	85.9%	108
Took a trip to an adjacent province / region	61.8%	47.9%	48.6%	127
Took a trip to non-adjacent province / region	38.3%	31.1%	31.4%	122
Newfoundland and Labrador	5.1%	4.3%	4.3%	119
Prince Edward Island	9.0%	7.1%	7.2%	125
New Brunswick	14.2%	11.7%	11.8%	120
Nova Scotia	14.1%	12.6%	12.7%	111
Quebec	41.6%	38.8%	38.9%	107
Ontario	55.5%	53.4%	53.5%	104
Manitoba	12.6%	9.0%	9.2%	137
Saskatchewan	13.9%	11.3%	11.4%	122
Alberta	39.0%	25.2%	25.8%	151
British Columbia	42.2%	30.1%	30.6%	138
Yukon	2.4%	0.9%	1.0%	241
Northwest Territories	2.2%	0.6%	0.7%	327
Nunavut	0.9%	0.3%	0.3%	323
United States	59.2%	50.2%	50.7%	117
Mexico	18.5%	12.1%	12.4%	149
Caribbean	28.2%	14.9%	15.6%	181
All other destinations	31.2%	23.3%	23.6%	132

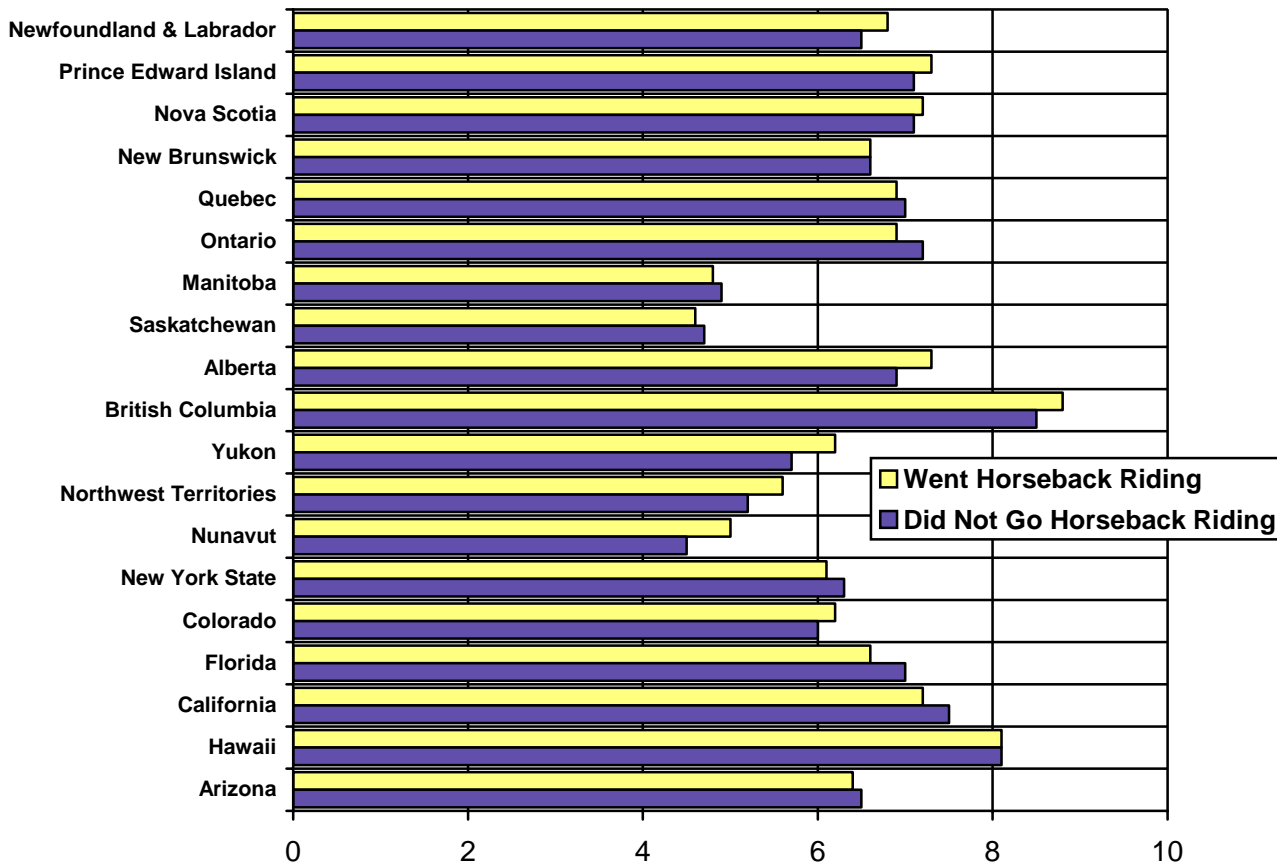
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Horseback Riders were more likely than other Canadian Pleasure Travelers to rate British Columbia, Alberta and the Northern Territories as appealing destinations. British Columbia (8.8) was rated as the most appealing destination overall, although they also gave high ratings to Alberta (7.3), Prince Edward Island (7.3) and Nova Scotia (7.2).

The appeal ratings of Horseback Riders for the U.S. reference states were comparable to those of 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 Outdoor Activities Pursued While on Trips

Horseback Riders are very active in outdoor activities while on trips. They frequently participated in ocean activities (e.g., sunbathing, swimming in ocean), wildlife viewing, hiking, climbing and paddling and boating and swimming while on trips. Relative to the average Canadian Pleasure Traveler, Horseback Riders were especially likely to participate in a wide range of physically strenuous activities including cycling, cross-country skiing and snowshoeing, downhill skiing and snowboarding, sailing and surfing, skating, exercising and jogging and extreme air sports while on trips.

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

	Went Horseback Riding	Did Not Go Horseback Riding	Pleasure Travelers	Index
Size of Market	904,309	17,535,200	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	74.0%	47.2%	48.5%	152
Wildlife Viewing	71.1%	39.7%	41.2%	172
Hiking, Climbing & Paddling	65.5%	32.4%	34.1%	192
Boating & Swimming (e.g., motorboating, swimming in lakes)	65.3%	39.9%	41.1%	159
Sports & Games (e.g., tennis, board games)	43.9%	21.6%	22.7%	193
Fishing	34.9%	23.0%	23.6%	148
Downhill Skiing & Snowboarding	31.4%	13.8%	14.6%	215
Cycling	31.4%	12.6%	13.5%	232
Exercising & Jogging	30.2%	15.1%	15.9%	190
Skating (e.g., ice skating, rollerblading)	25.2%	11.3%	12.0%	211
Golfing	25.1%	18.0%	18.3%	137
Team Sports (e.g., hockey, baseball)	21.0%	10.9%	11.4%	184
Cross-country Skiing & Snowshoeing	21.0%	8.7%	9.3%	225
Snowmobiling & ATVing	20.5%	10.9%	11.3%	181
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	14.0%	5.9%	6.3%	223
Motorcycling	7.9%	2.7%	3.0%	263
Wilderness Activities (e.g., wilderness skills course)	6.7%	2.1%	2.4%	282
Freshwater Scuba & Snorkeling	5.5%	2.9%	3.0%	182
Hunting	4.9%	4.7%	4.7%	104
Extreme Air Sports (e.g., parachuting)	3.6%	1.0%	1.1%	323

Outdoor Activities Pursued in a Typical Year

Horseback Riders are also very active in outdoor activities while not traveling. The majority went on day outings to parks and picnicking, swam, exercised at home or at a fitness club, went hiking, cycling and camping and gardened at home. In addition to horseback riding, Horseback Riders were particularly likely to go canoeing or kayaking, downhill skiing, rollerblading, snowboarding and skateboarding while not traveling.

Fig. 7 Outdoor Activities Pursued in a Typical Year

	Went Horseback Riding	Did Not Go Horseback Riding	Pleasure Travelers	Index
Size of Market	904,309	17,535,200	18,439,508	100
Day outing to a park	74.8%	66.5%	66.9%	112
Swimming	73.4%	59.6%	60.3%	122
Exercising at home or at a fitness club	66.3%	60.7%	61.0%	109
Hiking	63.5%	48.0%	48.8%	130
Gardening	60.4%	59.7%	59.8%	101
Picnicking	58.9%	52.8%	53.1%	111
Cycling	57.3%	43.6%	44.3%	129
Camping	55.4%	37.7%	38.6%	144
Horseback riding	39.3%	5.1%	6.8%	577
Ice-skating	38.6%	28.0%	28.5%	135
Jogging	33.3%	23.6%	24.1%	138
Fishing	31.5%	29.2%	29.3%	107
Canoeing or kayaking	30.9%	16.2%	16.9%	183
Sailing or other boating	30.3%	23.1%	23.4%	129
Playing team sports	30.1%	22.6%	22.9%	131
Downhill skiing	29.4%	15.5%	16.2%	181
Golfing	29.0%	29.4%	29.4%	99
Playing racquet sports (e.g., tennis or badminton)	25.9%	18.8%	19.1%	135
Rollerblading	22.9%	13.9%	14.4%	159
Cross-country skiing	16.7%	12.2%	12.5%	134
Riding an all-terrain vehicle (ATV)	16.1%	14.2%	14.3%	113
Snowboarding	10.7%	4.8%	5.0%	212
Snowmobiling	10.1%	9.8%	9.8%	103
Hunting	7.9%	7.7%	7.7%	101
Skateboarding	2.7%	1.5%	1.6%	171

Culture and Entertainment Activities Pursued While on Trips

Horseback Riders were highly active in culture and entertainment activities while on trips. They frequently went shopping and dining, visited historical sites, visited museums and art galleries as well as theme parks and exhibits and attended fairs and festivals while on trips. Relative to the average Canadian Pleasure Traveler, Horseback Riders exhibited particular interest in equestrian and western events and agro-tourism. They were also two to three times more likely than the average Canadian Pleasure Traveler to have taken part in participatory, learning activities (e.g., aboriginal cultural experiences, participatory historical activities), to have visited spas and to have patronized high art performances and attended literary and film festivals while on trips.

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

	Went Horseback Riding	Did Not Go Horseback Riding	Pleasure Travelers	Index
Size of Market	904,309	17,535,200	18,439,508	100
Shopping & Dining	92.7%	82.4%	82.9%	112
Historical Sites, Museums & Art Galleries	76.3%	57.4%	58.3%	131
Theme Parks & Exhibits	60.0%	38.1%	39.2%	153
Fairs & Festivals	57.1%	36.7%	37.7%	151
Musical Concerts, Festivals & Attractions	52.5%	31.7%	32.7%	160
Wine, Beer & Food Tastings	36.8%	23.1%	23.8%	155
Science & Technology Exhibits	31.8%	22.7%	23.1%	138
Casinos	30.7%	25.7%	25.9%	118
Agro-Tourism	30.3%	14.9%	15.7%	193
Live Theatre	29.1%	20.7%	21.1%	138
Garden Theme Attractions	28.8%	17.0%	17.6%	164
Aboriginal Cultural Experiences	27.4%	10.8%	11.6%	236
Equestrian & Western Events	23.2%	5.8%	6.7%	349
Professional Sporting Events	23.1%	15.3%	15.7%	147
Spas	21.8%	9.4%	10.0%	217
High Art Performances	19.8%	10.5%	11.0%	180
Comedy Festivals & Clubs	16.8%	9.8%	10.1%	165
Amateur Tournaments	16.8%	11.6%	11.8%	142
Participatory Historical Activities	12.0%	6.4%	6.7%	179
Literary & Film Festivals	8.8%	2.3%	2.6%	342
National & International Sporting Events	6.6%	3.0%	3.2%	205

Culture and Entertainment Activities Pursued in a Typical Year

Horseback Riders are also very active in culture and entertainment pursuits when not traveling. Relative to the average Canadian Pleasure Traveler they were especially likely to attending local rodeos, local live rock and jazz music performances (e.g., bars with live pop or rock bands, rock music concerts, jazz clubs) and local day spas.

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

	Went Horseback Riding	Did Not Go Horseback Riding	Pleasure Travelers	Index
Size of Market	904,309	17,535,200	18,439,508	100
Going out to eat in restaurants	95.3%	91.3%	91.5%	104
Going to festivals or fairs	69.3%	61.0%	61.4%	113
Going to amateur sporting events	47.8%	41.7%	42.0%	114
Going to pick-your-own farms or farmers' market	46.4%	40.7%	41.0%	113
Going to bars with live pop or rock bands	43.5%	26.9%	27.7%	157
Going to historic sites or heritage buildings	41.9%	39.2%	39.3%	107
Going to live theatre	40.2%	34.5%	34.8%	116
Going dancing	39.2%	29.4%	29.9%	131
Going to zoos or aquariums	38.6%	30.0%	30.4%	127
Going to art galleries or art shows	36.8%	31.5%	31.8%	116
Going to professional sporting events	36.7%	31.8%	32.1%	115
Going to museums	36.6%	32.5%	32.7%	112
Going to rock music concerts	33.6%	21.9%	22.4%	150
Going to amusement or theme parks	33.0%	28.7%	28.9%	114
Going to botanical gardens	26.1%	25.3%	25.4%	103
Going to day spas	21.6%	13.4%	13.8%	157
Going to rodeos	19.1%	6.7%	7.3%	261
Going to classical music concerts	18.0%	16.4%	16.5%	109
Going to gamble in casinos	17.4%	18.1%	18.1%	96
Staying overnight in a hotel or B&B in own city	12.8%	9.7%	9.9%	129
Going to jazz clubs	12.3%	7.3%	7.5%	164
Going to the ballet	9.4%	7.2%	7.3%	129
Going to the opera	8.0%	6.5%	6.6%	121

Accommodation Stayed In While on a Trip

Horseback Riders most often stayed in public campgrounds while on trips in the past two years. They were also four times more likely than the average Canadian Pleasure Traveler to have stayed at a farm or guest ranch. They were also more likely than average to stay at ski or mountain resorts, health spas, wilderness lodges or outposts, houseboats and cooking schools during the past two years.

Fig. 10 Accommodation Stayed in While on Trips

	Went Horseback Riding	Did Not Go Horseback Riding	Pleasure Travelers	Index
Size of Market	904,309	17,535,200	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	46.5%	25.3%	26.4%	176
Seaside Resort	35.4%	20.0%	20.7%	171
Lakeside / Riverside Resort	30.8%	21.9%	22.3%	138
A Private Campground	29.4%	18.2%	18.8%	157
Ski Resort or Mountain Resort	26.4%	13.3%	13.9%	189
A Camp Site in a Wilderness Setting (Not a Campground)	14.8%	8.3%	8.6%	172
Health Spa	13.3%	5.6%	5.9%	225
Farm or Guest Ranch	13.2%	2.5%	3.0%	434
Wilderness Lodge You Can Drive to by Car	11.0%	5.3%	5.6%	196
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	7.5%	4.3%	4.5%	167
Country Inn or Resort with Gourmet Restaurant	7.4%	5.0%	5.1%	146
Remote or Fly-In Wilderness Lodge	3.8%	1.5%	1.6%	238
On a Houseboat	2.8%	1.3%	1.4%	208
Remote or Fly-In Wilderness Outpost	1.5%	0.5%	0.6%	264
Cooking School	1.0%	0.3%	0.4%	273
Wine Tasting School	0.4%	0.3%	0.3%	141

Tours and Cruises Taken During Past Two Years

Horseback Riders were much more likely than the average Canadian Pleasure Traveler to have taken tours or cruises in the past two years. They were most likely to have taken sameday tours (both guided and self-guided), scenic countryside drives and city tours. Relative to the average Canadian Pleasure Traveler, Horseback Riders were two to three times more likely to have taken a wilderness tour, a winery tour and an air tour in an airplane or helicopter. They were also twice as likely to have taken sightseeing cruises and Great Lakes cruises. Cruises on other lakes or rivers and ocean cruises (e.g., Caribbean cruise) were also popular with this activity segment.

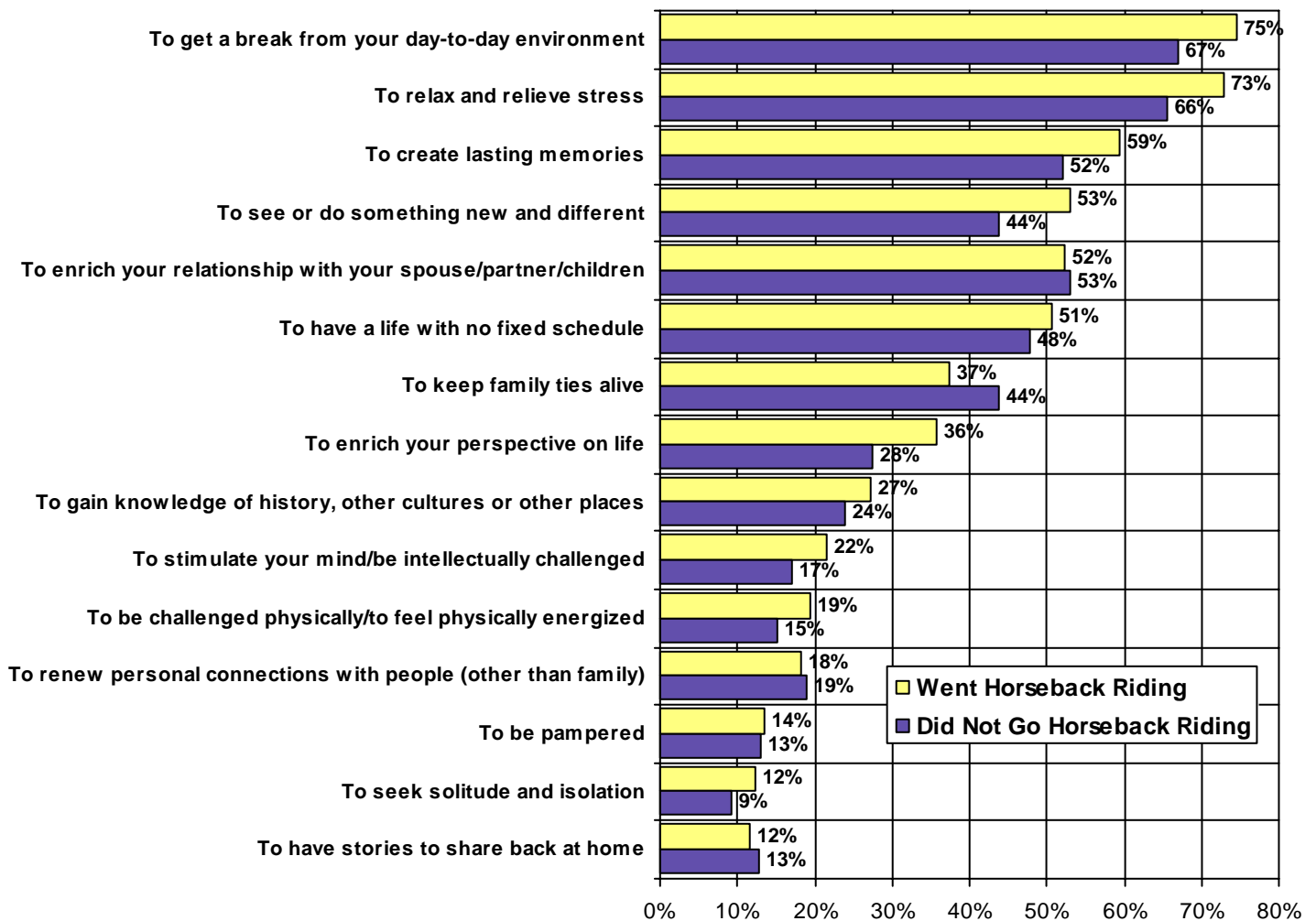
Fig. 11 Tours and Cruises Taken During Past Two Years

	Went Horseback Riding	Did Not Go Horseback Riding	Pleasure Travelers	Index
Size of Market	904,309	17,535,200	18,439,508	100
A self-guided, sameday tour while on an overnight trip	48.2%	28.3%	29.3%	165
An organized, sameday, guided tour while on an overnight trip	42.2%	21.2%	22.2%	190
Around the countryside - scenic drives	40.5%	21.5%	22.4%	180
Around the city	39.2%	22.6%	23.4%	168
Wilderness tour	30.8%	12.1%	13.0%	237
On the water (sightseeing cruise)	28.2%	12.3%	13.1%	215
A self-guided, overnight tour where you stayed in different locations	25.8%	17.7%	18.1%	143
Some other type of tour	17.0%	9.5%	9.8%	173
An organized, overnight, guided tour where you stayed in different locations	13.1%	9.9%	10.1%	130
An organized, overnight, guided tour where you stayed in a single location	12.6%	7.6%	7.8%	160
To a winery	11.2%	5.4%	5.6%	199
To a casino	10.1%	6.3%	6.5%	154
Caribbean ocean cruise	8.2%	5.3%	5.4%	152
In the air as a pilot or passenger of an airplane or helicopter	5.5%	1.7%	1.9%	291
Ocean cruise – Other	5.1%	3.2%	3.3%	153
To a factory	5.0%	2.5%	2.6%	188
Cruise on another lake or river	4.1%	2.3%	2.4%	173
Some other type of cruise	2.6%	1.5%	1.6%	161
Cruise on the St. Lawrence River	2.0%	1.9%	1.9%	103
Alaskan ocean cruise	1.8%	1.6%	1.6%	112
Great Lakes cruise	1.8%	0.7%	0.8%	229
Submarine cruise	0.1%	0.1%	0.1%	105

Benefits Sought While On a Vacation

As with most Canadian Pleasure Travelers, Horseback Riders take vacations to get a break from their day-to-day environment, to relax and relieve stress, to create lasting memories, to see or do something new and different, to enrich family relationships and to live without a fixed schedule. They are especially likely to consider it important that a vacation provides a break from their daily environment and be relaxing. Relative to the typical Canadian Pleasure Traveler, Horseback Riders seek vacations that offer novelty (e.g. creates lasting memories, seeing or doing something new and different), intellectual stimulation (e.g., enrich perspective on life, gain knowledge of the history or culture of a destination) and physical challenges. They are less likely to view vacations as opportunities to keep family ties alive.

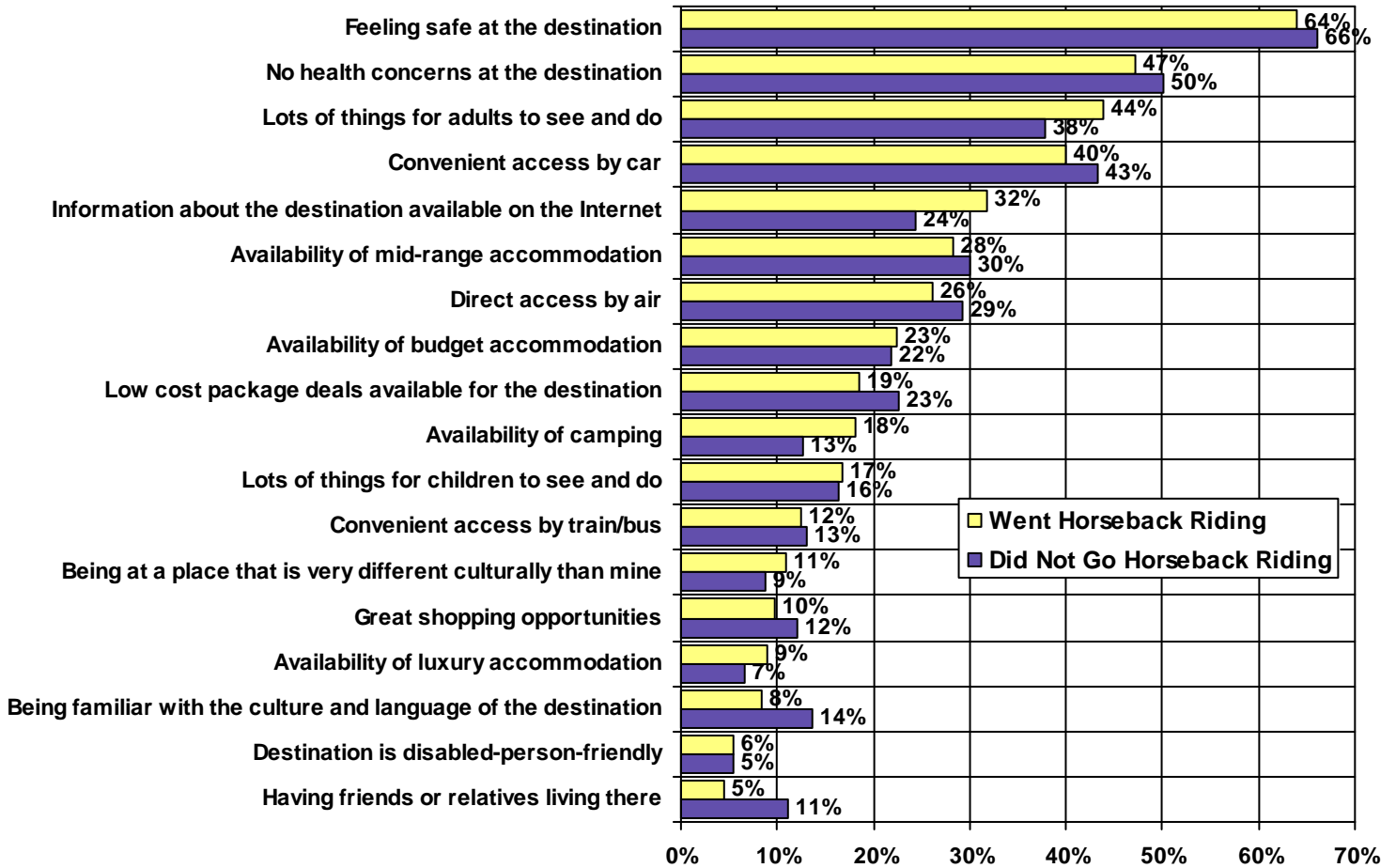
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

Similar to other Canadian Pleasure Travelers, the majority of Horseback Riders consider it important that they feel safe at a destination. However, Horseback Riders consider it more important than other Canadian Pleasure Travelers that a destination has lots of things for adults to see and do, camping and information readily available on the Internet.

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



How Destinations are Selected

Similar to most Canadian Pleasure Travelers, Horseback Riders begin vacation planning with a particular destination in mind. However, Horseback Riders are more likely than average to begin their vacation planning by considering the specific activities they would like to do. They are also more likely than the average Canadian Pleasure Traveler to be responsive to discount vacation packages.

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

	Went Horseback Riding	Did Not Go Horseback Riding	Pleasure Travelers	Index
Size of Market	904,309	17,535,200	18,439,508	100
Summer				
Started with a desired destination in mind	48.7%	48.5%	48.5%	101
Started by considering specific activities wanted to do	18.0%	13.6%	13.8%	130
Started with a certain type of vacation experience in mind	25.3%	23.6%	23.7%	107
Looked for packaged deals - no destination in mind	2.0%	1.3%	1.3%	151
Considered something else first	3.0%	4.4%	4.3%	70
Don't know / Other	3.0%	8.7%	8.4%	36
Winter				
Started with a desired destination in mind	43.1%	49.0%	48.6%	89
Started by considering specific activities wanted to do	22.5%	15.2%	15.6%	144
Started with a certain type of vacation experience in mind	19.4%	19.3%	19.3%	101
Looked for packaged deals - no destination in mind	5.9%	3.0%	3.2%	185
Considered something else first	4.2%	4.7%	4.7%	89
Don't know / Other	4.8%	8.9%	8.6%	56

Trip Planning and Information Sources Consulted

The majority of Horseback Riders were responsible for planning their trips either on their own (49.2%) or with someone else (10.7%). However, Horseback Riders are more likely than the typical Canadian Pleasure Traveler to be solely responsible for trip planning.

When making vacation plans, Horseback Riders consult a wider variety of sources than the average Canadian Pleasure Traveler. The majority use Internet websites, word-of-mouth and their past experiences to plan travel. However, Horseback Riders were especially likely to obtain travel information from government sources (e.g., official travel guides or brochures, visitor information centres), travel guidebooks such as Fodor's, travel agents and trade, travel or sports shows.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Went Horseback Riding	Did Not Go Horseback Riding	Pleasure Travelers	Index
Size of Market		904,309	17,535,200	18,439,508	100
Who Plans Trips?	Respondent plans trips	49.2%	41.6%	42.0%	117
	Trip planning a shared responsibility	10.7%	16.7%	16.4%	65
	Someone else plans trips	40.1%	41.6%	41.5%	97
Information Sources Consulted	An Internet website	79.4%	64.5%	65.2%	122
	Advice of others / Word-of-mouth	63.1%	50.5%	51.1%	123
	Past experience / Been there before	59.0%	49.9%	50.4%	117
	A travel agent	44.8%	33.5%	34.1%	131
	Maps	38.4%	32.2%	32.6%	118
	Official travel guides or brochures from state / province	35.6%	25.4%	26.0%	137
	Visitor information centres	31.3%	23.0%	23.4%	134
	Articles in newspapers / magazines	25.8%	20.6%	20.9%	124
	An auto club such as CAA	21.9%	17.4%	17.7%	124
	Travel guide books such as Fodor's	21.1%	13.2%	13.6%	155
	Advertisements in newspapers / magazines	15.6%	14.2%	14.3%	110
	Travel information received in the mail	10.8%	8.7%	8.8%	122
	Programs on television	9.5%	7.4%	7.5%	127
	Visits to trade, travel or sports shows	6.3%	2.9%	3.1%	202
	An electronic newsletter or magazine received by e-mail	5.9%	4.1%	4.2%	141
Advertisements on television	5.8%	5.0%	5.0%	116	

Use of the Internet to Plan and Arrange Trips

Horseback Riders are heavy users of the Internet to research and book travel. They were the third most frequent user (of the 21 outdoor activity types) to use the Internet to both plan (77.8%) and book (54.2%) travel. The majority of Horseback Riders use hotel or resort websites, travel planning or booking websites (e.g., Expedia), airline websites, and the tourism websites of specific countries, regions or cities. However, they are also above-average users of cruise-line websites. They most often purchased airline tickets and accommodation online, but are also more likely than the average Canadian Pleasure Traveler to purchase travel packages and fares for travel by rail, bus or boat / ship.

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

		Went Horseback Riding	Did Not Go Horseback Riding	Pleasure Travelers	Index
Size of Market		904,309	17,535,200	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	22.5%	41.8%	40.8%	55
	Uses Internet to plan trips only	23.4%	22.1%	22.1%	106
	Uses Internet to book part of trip	54.2%	36.2%	37.0%	146
Types of Websites Consulted	A website of a hotel or resort	59.7%	56.8%	57.0%	105
	A travel planning / booking website	55.8%	45.0%	45.7%	122
	An airline website	55.6%	45.7%	46.3%	120
	A tourism website of a country / region / city	53.8%	49.6%	49.8%	108
	A website of an attraction	38.4%	34.2%	34.5%	111
	Some other website	32.1%	27.3%	27.6%	116
	A cruise line website	9.6%	8.0%	8.1%	119
A motorcoach website	2.4%	2.5%	2.5%	99	
Parts of Trips Booked Over The Internet	Air tickets	72.2%	69.3%	69.5%	104
	Accommodation	72.2%	68.9%	69.2%	104
	Car rental	29.0%	27.0%	27.1%	107
	Tickets or fees for specific activities or attractions	22.0%	23.8%	23.6%	93
	A package containing two or more items	20.5%	15.0%	15.4%	133
	Tickets for rail, bus or boat / ship fares	20.2%	14.9%	15.3%	132
	Other	7.4%	3.7%	3.9%	189

Media Consumption Habits

Horseback Riders are above-average consumers of travel-related media, including the travel sections of daily and weekend newspapers, travel magazines, travel websites, and travel shows on television. They can also be effectively targeted through photography and video magazines, outdoor activity and sports magazines, automobile and cycle magazines and health and beauty magazines. Horseback Riders exhibit less definition in terms of the television viewing preferences, but are more likely to listen to country and western and modern /alternative radio stations.

Fig. 17 Media Consumption Habits

		Went Horseback Riding	Did Not Go Horseback Riding	Pleasure Travelers	Index
Size of Market		904,309	17,535,200	18,439,508	100
Newspaper Readership	Reads daily newspaper	83.3%	87.5%	87.3%	95
	Reads weekend edition of newspaper	82.6%	87.5%	87.3%	95
	Reads local neighbourhood or community newspapers	58.7%	61.7%	61.5%	95
	Reads other types of newspapers	18.8%	17.1%	17.2%	110
	Frequently or occasionally reads travel section of daily newspaper	47.1%	45.7%	45.7%	103
	Frequently or occasionally reads travel section of weekend newspaper	49.2%	47.2%	47.3%	104
Types of Magazines Read (Top 5 Indexed)	Photography and video	6.2%	3.9%	4.1%	153
	Travel (e.g., Condé Nast)	17.4%	11.5%	11.8%	148
	Outdoor activities / sports	17.6%	12.6%	12.8%	137
	Automobile and cycle magazines	18.0%	13.2%	13.4%	134
	Fashion and beauty	28.7%	23.4%	23.7%	121
Type of Television Programs Watched (Top 5 Indexed)	Science fiction / Fantasy shows	21.9%	19.1%	19.2%	114
	Music / Music video shows/channels	28.9%	25.3%	25.5%	113
	Reality shows (e.g., Canadian Idol)	44.9%	39.5%	39.8%	113
	Situation comedies (e.g., Friends)	57.2%	50.9%	51.3%	112
	Travel shows	32.6%	30.2%	30.3%	107
Type of Radio Programs Listened To (Top 5 Indexed)	Country music	33.0%	23.4%	23.8%	138
	Modern rock/Alternative rock	49.7%	36.4%	37.1%	134
	Top 40 / Current hits	32.2%	24.8%	25.2%	128
	Jazz / Big band	10.7%	8.7%	8.8%	122
	Multicultural	9.1%	8.3%	8.4%	109
Types of Websites Visited (Top 5 Indexed)	Sites for specific activities or interests	44.2%	35.3%	35.9%	123
	Travel	60.3%	50.0%	50.6%	119
	Shopping (all types)	38.4%	33.2%	33.5%	115
	House and home	30.3%	28.0%	28.1%	108
	Entertainment	54.9%	51.3%	51.5%	107

Appendix One: Canadian TAMS 2006 Outdoor Activity Segmentation		
Activity Segment	Activities in Segment	
Golfing	Played During a Stay at a Golf Resort with Overnight Stay	Golf Tour Package to Play on Various Courses
	Played an Occasional Game While on a Trip	
Hunting	Hunting for Small Game	Hunting for Birds
	Hunting for Big Game	
Fishing	Fresh-Water Fishing	Salt-Water Fishing
	Ice Fishing	Trophy Fishing
Wildlife Viewing	Viewing Land Based Animals	Bird Watching
	Whale Watching & Other Marine Life	Visited National, Provincial /State Park
	Wildflowers /Flora Viewing	Viewing Northern Lights
Hiking, Climbing & Paddling	Mountain Climbing /Trekking	Fresh Water Kayaking /Canoeing
	Rock Climbing	Ocean Kayaking / Canoeing
	Hiking /Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
		White Water Rafting
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkeling in Sea /Ocean
	Sunbathing, Sitting on a Beach	Scuba Diving in Sea/Ocean
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Freshwater Scuba & Snorkeling	Scuba Diving in Lakes /Rivers	Snorkeling in Lakes /Rivers
Exercising & Jogging	Working Out in Fitness Centre	Jogging or Exercising Outdoors
Cycling	Overnight Touring Trip	Recreational - Same Day Excursion
	Mountain Biking	
Motorcycling	Overnight Touring Trip	Same Day Excursion
Horseback Riding	With an Overnight Stop	Same Day Excursion
Snowmobiling & ATVing	All Terrain Vehicle - Overnight Touring Trip	Snowmobiling As an Overnight Touring Trip
	All Terrain Vehicle - Same Day Excursion	Snowmobiling Day Use on Organized Trail
Downhill Skiing & Snowboarding	Snowboarding	Downhill Skiing
Cross-country Skiing & Snowshoeing	Cross-country Skiing	Cross-country or Back Country as an Overnight Touring Trip
	Snowshoeing	
Wilderness Activities	Wilderness Skills Courses	Dog Sledding
	Ice Climbing	
Skating	Ice Skating	In-Line /Rollerblading
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	
Team Sports	Ice Hockey	Curling
	Football	Basketball
	Baseball or Softball	Soccer
Sports & Games	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	

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

Appendix Two		
Canadian TAMS 2006 Culture and Entertainment Segmentation		
Events	Horse Races	
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