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North American Market Study - Interim
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SUBARCTIC WILDERNESS ADVENTURES LTD. -
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SUBARCTIC WILDERNESS ADVENTURES LTD.
NORTH AMERICAN MARKET STUDY
INTERIM REPORT

September 21, 1984

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EXECUTIVE SUMMARY

This interim report describes the first part of a North American (U.S.) market study conducted by Manecon Partnership for Subarctic Wilderness Adventures Ltd. in 1984. The major components of this report are a review of the product offered by Subarctic Wilderness Adventures Ltd., an analysis of the socio-demographic characteristics of adventure travellers and the identification of the U.S. markets by geographic region, and a brief review of the Canadian adventure product market.

Subarctic Wilderness Adventures Ltd. was founded to offer a wide variety of programs in a unique wilderness area in north eastern Alberta and the corresponding Northwest Territories area. Central to the majority of programs offered is a dual theme of a wilderness as well as a cultural experience.

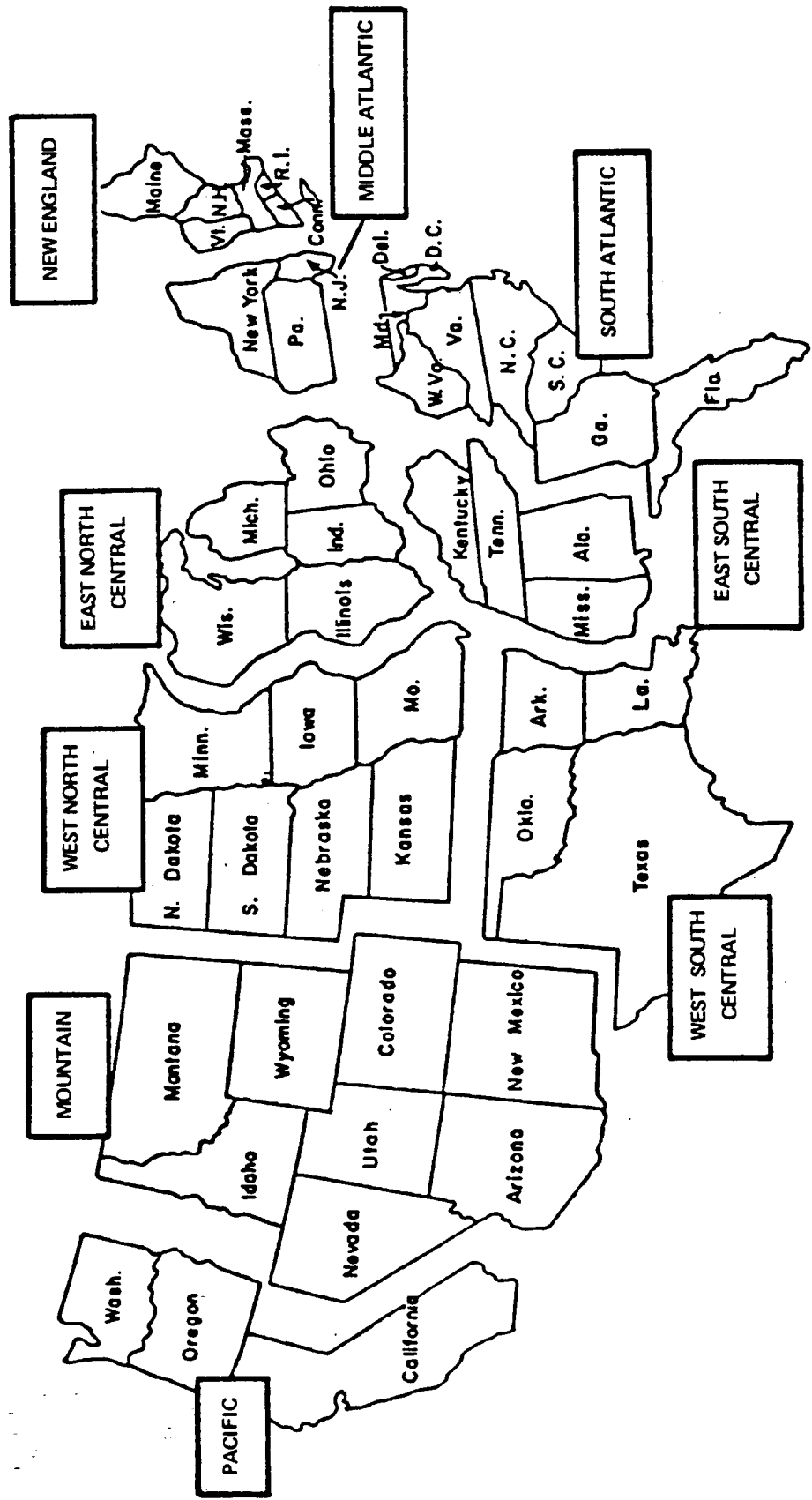
The review of the socio-demographic characteristics identifies the highest potential clients as: coming from the 30 to 50 year age group; likely to be college educated; employed in a professional, business or education field; and tending to come from a high income bracket. Both males and females may be regarded as being equally receptive towards Subarctic Wilderness Adventures product.

The following U.S. census regions were identified as being the highest potential U.S. markets for Subarctic Wilderness Adventures Ltd. (Figure 1). Individual cities within these regions are identified within the report.

1. Pacific
2. Middle Atlantic
3. East North Central
4. West South Central

FIGURE 1

GEOGRAPHIC REGIONS OF THE CONTINENTAL UNITED STATES



SUBARCTIC WILDERNESS ADVENTURES LTD.
NORTH AMERICAN MARKET STUDY
INTERIM REPORT

This report represents the first part of a study designed to identify the primary North American* market areas and contacts within those areas, for the unique products offered by Subarctic Wilderness Adventures Ltd. (SAWA). This first report will:

- 1) review the specific experience/product offered by SAWA,
- 2) suggest the typical socio-demographic characteristics of potential clients, and
- 3) identify the primary geographic locations of the Continental United States markets for SAWA's product, and
- 4) briefly discuss Canadian Markets.

Report #2 will provide further detail as to the special interest groups, media contacts and adventure product booking operators located within each geographic area.

It is important to note the context within which this market identification study is being performed. The total market identification study which Manecon Partnership has been engaged to perform represents only the first phase of SAWA's overall marketing plan. The information resulting from the market identification study will be used by SAWA to establish contacts within the market areas. These contacts will be surveyed in phase II in order to identify their needs and preferences. Phase III of SAWA's marketing plan will be the development of tour packages and products designed to meet the needs expressed by high potential clients.

The market identification study will therefore serve as a basis for SAWA's entire marketing plan. It is with this in mind that the first section of this report carefully reviews the existing product/experience offered by SAWA.

* focus on the Continental United States

2. SAWA's PRODUCT DESIGN

2.1 Underlying Features

An introductory brochure describing SAWA opens with the statement that the company offers visitors ". . . a unique northern wilderness experience, planned and conducted with care and respect for unspoiled creation." Although general in nature, this statement describes the essence of SAWA's product. The features which make SAWA's product unique relate to its geographic location, its wilderness orientation and its underlying cultural components.

SAWA utilizes two contrasting areas of wilderness which are located side by side in northeastern Alberta and the corresponding southern portion of the Northwest Territories. One of these areas is Wood Buffalo which is Canada's largest national park. The flat forested plains of the park are inhabited by numerous species of birdlife and wildlife including rare or unique species such as free roaming bison and wolf, the world's most northern white pelicans, and the few remaining whooping cranes. The second area utilized by SAWA is the Tazin Highland region to the northeast of Wood Buffalo. These highlands contrast the park in that, in conjunction with the Slave River Rapids, they form the edge of the Canadian Shield land formation. As part of the Shield, the Highlands and Slave River Rapids are characterized by sudden outcrops of moss and lichen covered ridges, numerous cold clear lakes, fast flowing rivers and streams, and intermittent forests of pine, spruce and poplar.

The wilderness feature of SAWA's product is perhaps its strongest focus. Whether clients choose to stay based in Fort Smith or to travel into the backcountry the element of wilderness is always present. Even while in Fort Smith, a southern visitor becomes acutely aware of the vast surrounding wildlands without apparent

boundaries or lines. This wilderness concept has been and will remain one of the most attractive features of SAWA's product.

However, it is the underlying cultural focus of the SAWA product/experience that distinguishes it from most other wilderness experiences. While solitude may be sought and obtained through SAWA's program, a definite emphasis on the cultural aspects of a visit to this area of the north is also present. Southern cultures are becoming more aware of the traditional northern lifestyles and the threats to its existence. This awareness is creating a strong incentive to "visit the North". Visitors desire to witness and experience life on the land, throughout all seasons including winter, in fear that it may soon be lost.

An additional aspect of SAWA's product/experience which makes it unique is its flexibility. The product is usually aimed at individuals or small groups, consistently involves visits to the geographic areas previously mentioned, and has a combined wilderness and cultural orientation, however endless variations exist within these broad parameters. The following items are just a sample of the variations provided by SAWA:

- o Seasons of Operation - winter, spring, summer, fall
- o Mode of Visitor Travel - various traditional and modern methods related to land and water
- o Nature Experience - recreational, natural history, cultural, physical
- o Intensity of Experience - off-road adventurer or observer, novice or experienced
- o Level of Service - personal guide or outfitted for solo
- o Cost - \$25 to \$1500

2.2 Winter Programs

An examination of the winter and warm weather programs demonstrates the variety of experiences offered by SAWA. There are four main types of programs run by SAWA throughout the winter.

1. On the land

This program emphasizes cultural contact with traditional living natives of the north. Paying guests accompany their hosts on the host's regular rounds, following the ecological flow of the wildlife. Visitors are immersed in the culture and become a part of the experience rather than remaining an observer.

2. Escorted dogsled touring with ski and snowshoe side trip options while living on the land

This program may be focussed in Wood Buffalo National Park, the Tazin Highlands or be community based out of Fort Smith. Guests seek the companionship and expertise of native people who live authentic life on the land.

3. Self-service hut-to-hut or tipi/tent basecamp touring

This program is primarily offered in the Wood Buffalo National Park area. The services provided by SAWA include equipment rentals, transportation to the trail-head or basecamp as well as the use of the lodging.

4. Solo dogsledding

Guests have the option of participating in this program in a day use or on an overnight basis. They are supplied three "follower" dogs, sled, gear, mandatory briefing lessons, minimum of one day orientation and certification of proficiency upon the successful completion of treks.

The following list identifies just a portion of the experiences which may be shared on any one of the above programs:

- meeting and living alongside local lifetime residents
- prairie game stalking and viewing
- general natural history
- northern lights

- campfire rest stops
- good soup
- ice fishing
- blue skies
- instruction in new skills
- sighting wildlife tracks and signs
- homemade bannock
- a broad temperature range
- shared work duties
- hearty meals
- game meats and fish
- star gazing
- candlelight stories

2.3 Warm Weather Programs

The warm weather season programs offered by SAWA run through the spring, summer and fall seasons. These programs include:

1. Rafting the Slave River Rapids

Guests experience the alternating excitement and tranquility of one of the world's most beautiful wilderness rivers. Trips range from one-half to four days.

2. Stream, river and lake paddling

A variety of escorted or unescorted canoe trips may be arranged within Wood Buffalo National Park or the Tazin Highlands.

3. Paddling the Slave River Corridor

Guided canoe trips along the Slave River Corridor which by-pass the dangerous rapids. The focus is on retracing early exploration routes and enjoying the exceptionally spectacular wilderness setting.

4. Stalking big game

An exploration of the outstanding features of Wood Buffalo National Park utilizing cabin, motel and tipi or tent accommodation.

5. Basecamp outfitting

SAWA will supply briefing, equipment, transport and food logistics needed to set up a basecamp for the do-it-yourself guests.

6. Subarctic wilderness mosaic treks

Total immersion into the wilderness setting involving visits to virtually every ecological zone of the subarctic. Transportation is by foot, by minibus and by rowboat, raft and/or canoe.

7. Nomadic fly-in fishing and camping adventures

The focus in this program is a 'life on the land' emphasis. Fishing is one component of the total experience. Guests may choose a solo or escorted wilderness adventure.

8. Subarctic mosaic experience

Features minibus tours and brief walks around the community of Fort Smith, the Slave River Rapids, and within Wood Buffalo National Park. The climax of this adventure is a boat trip along the Slave River Rapids.

9. Salt Plains Desert stream paddling and hiking

This program combines extensive walking and paddling as a means of visiting wildlife routes of the Salt Plains of Wood Buffalo National Park. The unique natural history and animal behaviour of the area serves as the focus of this program.

It should be noted that the above categorization of SAWA's winter and warm weather programs is essentially a framework and not an unchangeable itinerary. One of the primary features of SAWA is that it caters to small groups or individuals, thereby allowing SAWA's program to be sensitive to its clients' unique needs.

3. SOCIO-DEMOGRAPHIC CHARACTERISTICS OF ADVENTURE TRAVELLERS

If potential markets for SAWA's product/experiences are to be located it is important to understand what type of person would normally be attracted to that type of product. Painting this generalized picture of a potential client is not an easy task. The assumptions and generalizations made along the way may create an artificial picture of a client who does not necessarily exist as an exclusive entity. This caution is reflected in the research findings of Kelly (1980), who stated that ". . . at present it is misleading to refer to all leisure being 'determined' by any factor or set of factors". This statement is not suggesting that the socio-demographic characteristics be ignored but rather that they not be totally depended on as the sole predictor of outdoor recreation participation.

In recognition of the positive role which these traits can play, this section of the report examines the socio-demographic characteristics of potential SAWA clients as a first step in identifying potential North American markets.

The socio-demographic characteristics to be examined include: age, sex, education, occupation and income. A combination of document research and personal interview techniques was used as the research methodology. Suggestions as to the socio-demographic characteristics of potential SAWA clients have been based on a review of the characteristics of past SAWA guests, a review of the characteristics of general tourists travelling to Alberta and the NWT, a review of the characteristics of outdoor recreation participants and finally a review of the characteristics of clients attending other adventure product businesses. All of these sources are considered and suggestions are made based on these findings with additional consideration given to the unique product/experience offered by SAWA.

Prior to a review of each separate socio-demographic trait of high potential clients, it is worth describing the general traits of past and present SAWA clients. These clients may be generally categorized in the following manner:

1. primarily urban
2. mobile and well travelled
3. annual income from \$30,000 to \$50,000 Canadian
4. active rather than passive personalities (even in the over 50 year old range)
5. self-employed or upper management
6. travelled to Fort Smith by aircraft
7. come individually or in small groups of family or friends
8. usually not agency referrals, but rather independent booking in response to media features on SAWA
9. generally are looking for a non-consumptive outdoor recreation experience featuring an escort, native cultural elements, extraordinary landscape or wildlife viewing and authentic private (home) pension or primitive accommodation
10. often residents of the western regions of the United States

3.1 Age

SAWA past experience has included guests within a broad spectrum of age groups ranging from children accompanied by their parents through to senior citizens. However, the single most prominent age group was identified as the 40 to 50 year old group.

General travellers to Alberta and the NWT tend to show a similar pattern. The Gallup Organization (1983) "Survey on Potential Market for Travel to Canada" shows that the age group ranging from 38 to 54 was more likely to have visited Canada in 1982 than respondents from other age groups. A total of 40 percent of U.S. respondents who had visited Canada in 1982 fell in this age category.

A review of other adventure product research reveals a similar trend. Research conducted by Beta Research Corporation suggests that the medium age for adventure travellers is 34.4 years. Dick McGowan of Mountain Travel paralleled that indication by suggesting that the majority of adventure travellers fall in the 30 to 40 year age group, but he emphasized that 15 percent of his travellers were over 60 years old.

In view of these findings the highest potential SAWA clients would appear to come from the 30 to 50 year age range. A second marketing priority in terms of age would be individuals over 50 years old. This group would be especially attracted to SAWA's products which focus on cultural visitation and the investigation of natural history rather than focussing on physical challenge.

3.2 Sex

In the past SAWA has experienced a fairly even distribution between its female and male guests. This same ratio was also reflected under the general travel studies (Gallup Organization 1983).

Differences in male and female participation became more apparent under the outdoor recreation review. Kelly (1980) states that males are more likely than females to participate in activities that have been traditionally identified with masculinity such as hunting, fishing, and camping. "Explore Magazine" (1984) found that three quarters of the respondents to their readership survey were male. However a review of the attendance at the Blue Lake Centre (AR&P 1983) outdoor recreation school showed an even split between males and females.

Finally specific adventure product research shows conflicting findings. The Beta Research Corporation (1980) study indicates that male participants outnumber female participants 2.3 to 1. Mountain Travel, on the other hand, states that 52 percent of their clients are male while 48 percent are female.

The trend that emerges from this review is an even distribution between male and female in the area of general travel and in some aspects of outdoor recreation and adventure travel. In those cases where male participation is seen to dominate it usually reflects a strenuous activity with traditional ties to masculinity. In view of SAWA's strong cultural and natural history characteristics, potential clients would just as likely be female as male. There may however, be some merit in directing extra marketing at the female segment of the population to emphasize the cultural and natural history aspects of SAWA's product.

3.3 Education

It has been the experience of SAWA that almost all of its guests have been college graduates. This finding is supported in almost every other area.

In terms of general travel the Gallup (1983) study found that college graduates were the most likely group to have travelled to Canada in 1982. Kelly (1980) presents the exception by stating that higher education is only moderately positively related to cross-country skiing and is, in fact, negatively related to snowmobiling. Specific adventure traveller research indicates a very positive relationship between education and participation. Evidence of this relationship is provided by Beta Research Corporation (1980) research which stated that 86.2 percent of adventure travellers have attended college or more. Mountain Travel have also found that almost all of their clients have been college educated.

In view of these findings potential clients for SAWA should be considered to come almost exclusively from the college educated group. There is additional rationale for this approach in that SAWA's product is designed as an intellectual as well as a physical participatory adventure.

3.4 Occupation

In the past, the occupation of the majority of guests to SAWA has been either some type of profession or business. This trend is generally found in the other categories as well.

The Gallup Organization study (1983) showed exactly this trend with 28 percent of all respondents who had travelled to Canada in 1982 belonging to the professional and technical group. Business people were also more likely to have made a Canadian vacation trip than most other occupations. It is worth noting that 24 percent of the U.S. residents who vacationed in Canada were listed as not employed. This large group would include those people who were retired.

Kelly (1980) found a fairly weak relationship between occupation and outdoor recreation participation with the exception that the more prestigious occupation (professional) tended to cross-country ski more often. The Blue Lake Centre participant study showed that 40 percent of their attendees were either instructor/teachers or professionals.

The experience of other adventure tour companies is also supportive of this trend. Beta Research Corporation (1980) found that 70.2 percent of adventure travellers were employed in professional and managerial positions. Mountain Travel felt that their clients came from the following fields of occupation:

1. business - especially owners
2. medical field professionals
3. occupations related to the general sciences
4. educators

In view of these findings and in consideration of SAWA's product potential clients should be considered to come primarily from the business and professional fields. Within these fields, business

owners and medical professionals would appear to be especially significant. Due to the educational aspects of SAWA's product, individuals employed as educators and scientists should also be considered as high potential clients.

3.5 Income

Past guests of SAWA have tended to come almost exclusively from the high income categories. The majority of these guests have come from financially well established families as opposed to the "nouveau riche".

Findings in all other categories support this characteristic of increased adventure product participation with higher incomes. Beta Research Corporation (1983) study on U.S. resident travel to Canada shows that on a one-to-one basis individuals in higher income bracket were more likely to have travelled to Canada in 1982 than those in lower income brackets. Outdoor recreation participation data shows that higher family incomes are associated with higher levels of activity in expensive outdoor pursuits (Kelly, 1980). "Explore Alberta's" survey found that 72 percent of their respondents earned over \$20,000 per year. Finally, other adventure travel operators supported this trend in that Beta Research Corporation (1980) found that 65.2 percent of adventure travellers earn over \$25,000 U.S. per year and Mountain Travel stated that almost all of their clients were in the \$30,000 U.S. and up income range.

In view of the dominant findings stated above, potential clients for SAWA should be considered to come from the \$35,000 Canadian and up range. Even though SAWA offers some relatively inexpensive programs the transportation costs associated with getting up to Fort Smith restrict the market to high income or wealthy individuals.

3.6 Socio-Demographic Summary

Table 1 summarizes the discussion of the socio-demographic characteristic of adventure travellers. The highest potential clients for SAWA range in age from 30 to 50 years old. Individuals over 50 consist of the second most important age group. Both males and females would be attracted to the product in equal proportions. Some extra marketing to the females stressing the cultural and natural history aspects of the product would overcome any reluctance related to traditional stereotyping of the outdoors as a man's domain. College educated individuals are more likely to purchase the product than less formally educated individuals.

People employed in business and professional positions are prime candidates especially those who own their business or are in the medical field, or are employed as educators.

Finally, those individuals who earn \$35,000 or more per annum in the equivalent of Canadian funds are high potential clients of SAWA. The marketing of SAWA's product should ideally be aimed at individuals who possess all or a majority of these characteristics, but special attention should be given to the income characteristic as it is a limiting factor which would tend to dominate most others.

Table 1

SOCIO-DEMOGRAPHIC CHARACTERISTICS OF ADVENTURE TRAVELLERS

Charac- teristics	I N F O R M A T I O N S O U R C E S				
	PAST SAWA GUESTS	TOURISTS IN GENERAL	OUTDOOR RECREATION PARTICIPANTS	OTHER ADVENTURE PRODUCTS	HIGH POTENTIAL FOR SAWA
Age	- children to seniors - majority in 40's	- majority 38 - 54	- tend to be younger /20 years & up	- medium age 34.4 - significant no. of seniors	1. 30-50 yr age group 2. over 50 years
Sex	- even distribution	- even distribution	- fewer females than males	- fewer females than males	- even distribution
Education	- college graduates	- college graduates slightly dominant	- college graduates slightly dominant	- college educated	- college educated
Occupation	- professionals - business people	- profess/technical - business - not employed (retired)	- professionals - instructor/teachers	- business/professional - medical field - general science - educators	1. professional a) medical 2. business owners 3. educators
Income	- high income	- high income	- high income	- high income	- high income

4. GEOGRAPHIC LOCATION OF MAJOR MARKETS

This section of the report identifies the primary continental United States markets for SAWA's product. The emphasis of the geographic location identification has been addressed at a regional level. The top five geographic market regions are first identified on the basis of SAWA's past experience, the findings of general tourism studies, a survey of various tourism experts, and a survey of the major airlines which have been involved in the transport of U.S. tourists to the North. A further reduction to four regions is then made based on a comparison of each area's socio-demographic characteristics with consideration given to the previously established ranking. It should be noted that the regions used in this study correspond to those used by the U.S. Bureau of the Census and to most published tourism market studies. The names and locations of these regions are identified in Figure 1.

Once the final recommendation of the top four regions is made, up to five specific cities in each region are identified as market foci. The identification of the cities was made based primarily on population.

4.1 U.S. Adventure Product Market Analysis by Region

4.1.1 First Level Selection

SAWA has not concentrated on specific U.S. market areas in the past but have had guests from various parts of that country. A rough ranking of the regions of origin of these guests is:

1. Pacific
2. Mountain (Montana)
3. East North Central
4. New England, and
5. Middle Atlantic (New York).

The distribution of these guests was felt to be largely a result of various media articles about SAWA appearing in publications circulated in these areas.

Studies examining the origin of general tourism to Alberta and the Northwest Territories showed a rough ranking of:

1. Pacific
2. Mountain
3. West North Central
4. West South Central, and
5. Middle Atlantic.

The 1982 Alberta Travel Survey (13) divided the Pacific region into a northern half and a southern half. These halves were still ranked 1 - 2 showing the overall dominance of this region. It should be noted that the above ranking reflects auto-traffic tourists which may explain the high ranking given to the West North Central region in the Gallup (1983) study.

Varying suggestions as to the best U.S. market area for an adventure travel product were provided by the various tourism experts (see list of interviews) who were consulted. The one market area which was emphasized by all was the Pacific. The majority of these experts actually divided this region into the south (California) and the north (Washington and Oregon). These two halves

were often ranked one and two out of all the U.S. markets. Using a weighting system of the rankings provided, the following overall regional market priority was revealed:

1. Pacific
2. West North Central
3. West South Central
4. East North Central, and
5. Middle Atlantic.

It should be noted that the South Atlantic region was very close to making the fifth ranked position.

Consultation with airline marketing individuals resulted in the following market ranking:

1. Pacific
2. Middle Atlantic
3. East North Central
4. West South Central, and
5. West North Central.

The Mountain region was also identified as a significant market area, but was ranked slightly lower than the other regions listed. A note of caution is advised in relation to the airline findings. It was generally found that adventure traveller passengers represented a fairly minor portion of each airlines total passenger market. The individuals contacted from the airlines were therefore less confident of their rankings than the tourism experts had been. Never-the-less, four out of the five regions listed for the airline category were included in the tourism experts category only in a slightly different order.

Table 2 shows the regional market ranking of each category just discussed. The overall summary ranking was calculated based on a reverse weighting system. A value of 5 was awarded to the top ranked region in each category, 4 to the second ranked region in each category, and so on down to 1 for the last ranked region in each category. These values or scores were then added together for each region, to determine the overall ranking. The Pacific

Table 2

FIRST LEVEL RANKING OF REGIONS

#	SUBARCTIC WILD. ADVEN.	GENERAL TOURISM DATA	TOURISM EXPERTS	AIRLINE REPRESENTATIVES	SUMMARY RANKING
1.	Pacific	Pacific	Pacific	Pacific	Pacific
2.	Mountain	Mountain	West North Central	Middle Atlantic	West North Central
3.	East North Central	West North Central	West South Central	East North Central	East North Central
4.	New England	West South Central	East North Central	West South Central	Mountain
5.	Middle Atlantic	Middle Atlantic	Middle Atlantic	West North Central	Middle Atlantic
6.					West South Central

region received the highest score possible at 20 points and therefore received the number one overall rank. The West North Central, East North Central and Mountain regions were all tied at second with a total of 8 points each. Just slightly below at 7 points stands the Middle Atlantic region and the West South Central region. It is these six regions which will be examined in terms of their socio-demographic characteristics to identify the apparent top four ranked regions.

4.1.2 Second Level Selection

This section re-examines the identified market regions on the basis of three standard socio-economic characteristics: income, education and population. Section 3 of this report emphasized the importance of both a high level of income and a high level of education as indicators of high potential SAWA clients. Table 3 illustrates the respective ranking based on regional averages of each of these traits. The table also includes a ranking of the regional population averages. Areas of higher population were identified by tourism experts as the most favourable adventure product markets (McGowan). The most recent American data available was used to establish the ranking indicated for these three regional features. This source was the 1984 Statistical Abstract of the United States. The final regional ranking was determined by adding the numerical rank of each socio-demographic trait for each region. In this instance the lowest total score indicated the highest possible rank.

The analysis of this data reveals that California is once again ranked very strongly in the number one position. The following three ranked regions are the Middle Atlantic region at number two, the East North Central region at number three and the West South Central region at number four. These are the four regions on which future SAWA marketing should focus. Missing the cutoff point were the West North Central and Mountain regions ranked five and six respectively.

Table 3

REGIONAL RANKINGS OF SOCIO-DEMOGRAPHIC FEATURES

	Income	Education	Population	Score
1. Pacific	1	1	3	5
2. Mid Atlantic	2	5	2	9
3. East North Centr.	3	6	1	10
4. West South Centr.	4	3.5	4	11.5
5. West North Centr.	5	3.5	5	13.5
6. Mountain	6	2	6	14

Source: U.S. Department of Commerce

4.2 Recommended Metropolitan Markets

The selection of the following cities identified within each region as market foci have been made primarily on the basis of population. Suggestions provided by tourism experts were also incorporated into the listings.

1. Pacific	Population
Los Angeles	11,498,000
San Francisco	5,368,000
Seattle	2,093,000
Portland	1,298,000
San Diego	1,868,000

- Portland was ranked higher than San Diego as a potential market on the basis of the tourism experts comments.
- It should be noted that this region may contain other worthwhile marketing centres due to its overall high potential, e.g. Salem.

2. Middle Atlantic	Population
New York	17,539,000
Philadelphia	5,681,000
Pittsburgh	2,423,000
Buffalo	1,243,000

3. East North Central	Population
Chicago	7,937,000
Detroit	4,753,000
Cleveland	2,834,000
Indianapolis	1,167,000

- Minneapolis/St. Paul does not actually fall within this region, but its proximity to the area may merit further investigation.

4.	West South Central	Population
	Houston	3,101,000
	Dallas/Fort Worth	2,931,000

-Tourism experts felt that the primary market in this region was Texas, therefore only the major cities in Texas are listed.

5. CANADIAN MARKETS

While the primary focus of this research is to address the United States markets the following comments consider also the Canadian market. There are three main motivations for clients attracted by SAWA's tours:

- a) non-consumptive wildlife,
- b) cultural, and
- c) adventure/wilderness motivations.

The demand characteristics of each group are considered briefly below.

a) Non-Consumptive Wildlife Related Activities

We have reviewed a study by the Canadian Wildlife Service entitled "The Importance of Wildlife to Canadians" which was based on 1982 data. This study, conducted by survey, suggests 19.4 percent of Canadians (3.6 million people) participate in trips or outings whose primary purpose is a non-consumptive, wildlife related activity. Table 4 indicates provincial characteristics of some aspects of these activities.

"Primary Non-Consumptive Wildlife Related Trips" is defined in the survey as a special type of outing which has as its main purpose to observe, photograph or study wildlife. The most common sub-activities were watching and photographing wildlife. Activities that were specifically excluded consisted of incidental wildlife encounters, hunting, and home-based activities.

Primary non-consumptive wildlife related trips were most popular among males. Participants aged 25 - 34 years of age constituted 27.9 percent of trip takers and 33.6 percent possessed education beyond secondary school. The Northwest Territories and Yukon Territory were not included in the survey.

Table 4

SURVEY DATA: CANADIAN PARTICIPATION IN
PRIMARY NON-CONSUMPTIVE TRIPS OR OUTINGS - 1981

	NFLD	PEI	N.S.	N.B.	QUE	ONT	MAN	SASK	ALTA	B.C.	NAT'L AVERAGE
Percentage Participation	14.0	13.7	19.9	18.2	18.9	19.9	17.4	16.7	20.0	21.6	19.4
Average # of Days Engaged by Participants	13.3	15.4	12.3	15.2	15.6	14.5	16.3	15.9	20.1	18.2	15.8
Average Daily \$ Expen- diture/Participant	43	20	38	28	27	34	36	45	43	55	37

Expenditures on primary non-consumptive wildlife related trips or outings were distributed as follows:

Equipment	52.7%
Transportation	21.0%
Food	12.6%
Accommodation	8.1%
Other	5.6%

This distribution of the average daily expenditure per participant (Table 4) suggests that a large proportion of trips were of a one-day period, were unescorted, used road transportation and/or were based on camping accommodation. The sheer magnitude of this category suggests this is a group whose interest in wildlife is already aroused. The group therefore presents an attractive target for marketing attention. Average annual expenditures per participant in this category are, with the exception of hunting, the largest annual expenditure category in wildlife related activities as demonstrated below:

<u>Total Expenditure by all participants</u> \$ million	<u>Wildlife Related Activity</u>	<u>Average yearly expenditure per participant</u> \$
119.4	Wildlife Organizations	107
529.8	Maintaining Natural Areas	455
196.9	Residential Activity	16
2,111.4	Primary Non-Consumptive Trips	589
84.9	Incidental Encounters on Other Trips	10
1,192.6	All Game Hunting	662
<u>4.2 Billion</u>	Total	

Adjustment by the consumer price index for recreation adjusts the average Alberta daily expenditure per participant in the category of Primary Non-Consumptive Trips from a 1981 estimate of \$43.00 to a 1984 estimate \$50.74.

Participants did not differ much from the socio-demographic profile of the Canadian population, although the Atlantic

provinces fell below national averages. The study therefore suggests that in this category, as in the U.S., the market in Canada generally follows population distribution.

b) Cultural, and c) Adventure/Wilderness Tour Travellers

The travellers in these two categories will likely conform in Canada to the profiles demonstrated for the U.S. This suggests attention to the larger metropolitan areas, particularly those centres with major secondary educational institutions, should be considered as prime targets.

d) Summary of Canadian Markets

In general, the key markets appear to be centres such as Quebec City, Montreal, Toronto, Edmonton, Calgary and Vancouver.

TELEPHONE AND PERSONAL INTERVIEWS

Tourism Experts

Government Tourism Departments:

Alberta Tourism and Small Business
Dan Cherney

Northwest Territories Tourism & Parks
Al Kaylo ✓

Yukon Department of Tourism
John Lawson

Adventure Products Promoters

Mountain Travel (Adventure Travel Listings)
Dick McGowan

Airlines

Air Canada
Doug Sladen
Marketing Manager

Alaskan Airlines
Garry Odle
Director of Marketing

Pacific Western Airlines
Maureen Griffen
Manager of Tourism Travel

Subarctic Wilderness Adventures Ltd.
Jacques Van Pelt

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