

U.S. TRAVEL MARKET

**Board and Blade Activities While on Trips
Of One or More Nights**

A Profile Report

April 25, 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



Executive Summary

Over the last two years, 3.1% (6,969,316) of adult Americans participated in board and blade activities while on an out-of-town, overnight trip of one or more nights. Ice skating (1.7%) was the most popular activity, followed by inline skating or rollerblading (0.9%), ice hockey (0.6%) and skateboarding (0.5%). Among those who participated, 28.0% (1,992,985) reported that this activity was the main reason for taking at least one trip during the past two years.

Board and Bladers tend to be males and 18 to 44 years of age. The majority are married and they are more likely than the average U.S. Pleasure Traveler to have children less than 18 living at home. Their household income and level of education is above-average. They are over-represented in Alaska, and the New England, Middle Atlantic and Pacific regions of the United States.

Over the past two years, Board and Bladers traveled more frequently than the average U.S. Pleasure Traveler and they were more likely to have taken a trip to Canada (26.5% versus 14.6%). The most common destinations were Ontario, British Columbia and Quebec; however they are over-represented among U.S. Pleasure Travelers to all Canadian provinces and territories.

Board and Bladers tend to participate in many more activities on their trips than the average U.S. Pleasure Traveler. They consider it important that a vacation offers opportunities to see and do something new or different and allows them to be physically challenged and intellectually stimulated. Board and Bladers tend to prefer strenuous outdoor pursuits (e.g., games and individual sports; downhill skiing and snowboarding; team sports; extreme skiing, extreme air sports). They also exhibit an above average interest in sports-related entertainment activities (e.g., professional sporting events, amateur tournaments, national and international sporting events) while on trips. A vacation that combines a variety of physically challenging outdoor activities, learning opportunities and sporting events may have strong appeal for this activity segment.

Board and Bladers were also more likely than the average U.S. Pleasure Traveler to go on cruises and tours when on trips. They tended to stay at seaside resorts or public campgrounds, and they were much more likely than the average U.S. Pleasure Traveler to have stayed at ski or mountain resorts during the past two years.

The Internet is a key vacation planning tool for Board and Bladers. The large majority have visited travel websites and have booked at least part of a trip online in the past two years. Their media preferences are strongly oriented toward both sports and travel-related media.

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, 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 U.S. database is used in this current report. This survey was conducted by mail with an established U.S. mail panel. 60,649 completed questionnaires were returned. The mail panel response rate for this survey was 71.3%. The data have been weighted to project the results to the United States population.

This report profiles participants in Blade & Board activities (ice hockey, ice skating, rollerblading and skateboarding) while on a trip, and compares them with other U.S. Pleasure Travelers (i.e., took at least one pleasure trip in the last two years). This report is part of a series of 43 Activity Reports prepared using the U.S. TAMS database.

Blade & Boarding While on Trips

Market Incidence

Over the last two years, 3.1% (6,869,316) of adult Americans participated in Blade & Board activities while on an out-of-town, overnight trip of one or more nights. Ice skating (1.7%) was the most popular activity, followed by in-line skating or rollerblading (0.9%), ice hockey (0.6%) and skateboarding (0.5%).

Of those who participated in Blade & Board activities while on trips, 28.0% (1,922,985) reported that this activity was the main reason for taking at least one trip in the past two years. Ice hockey (60.2%) was much more likely to have been the main reason for taking a trip than skateboarding (30.9%), ice skating (20.8%) or rollerblading (30.9%).

Fig. 1 Incidence of Blade & Boarding While on Trips¹

	Number of Board and Bladers ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total U.S. Population ⁵
Size of Market	6,869,316	1,922,985	170,510,241	222,846,268
Blade & Board (All Activities)	6,869,316	28.0%	4.0%	3.1%
Ice skating	3,703,007	20.8%	2.2%	1.7%
In-line skating / Rollerblading	2,100,413	17.9%	1.2%	0.9%
Ice hockey	1,384,190	60.2%	0.8%	0.6%
Skateboarding	1,161,624	30.9%	0.7%	0.5%
Participated in all four blade & board activities	54,160	33.3%	Less than 0.1%	Less than 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 - "Board and Bladers" are defined as individuals who participated in ice hockey, ice skating, rollerblading or skateboarding 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, overnight 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, overnight 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 U.S. Adult Market who participated in each activity on a trip during the past two years.

Incidence by Region, State and Population Size

Those who participate in Blade & Board activities while on trips tend to be over-represented relative to the average U.S. Pleasure Traveler among those living in Alaska, and the New England, Middle Atlantic and Pacific regions of the United States. They also tend to live in large cities with populations of 2 million or more.

Fig. 2 Geographic Distribution & Population Size of Those Who Went Blade & Boarding While on Trips

	Total Population	Estimated Number of Board and Bladers	Percent of Pleasure Travelers in Region Who Went Blade & Boarding on a Trip	Percent of Total Regional Population Who Went Blade & Boarding on a Trip
United States	222,846,268	6,869,316	4.0%	3.1%
New England	11,095,629	512,868	6.0%	4.6%
Middle Atlantic	31,005,526	1,098,327	4.8%	3.7%
East North Central	34,621,254	1,080,278	4.1%	3.1%
West North Central	15,024,360	489,967	4.1%	3.3%
South Atlantic	42,602,998	1,262,466	3.9%	3.0%
East South Central	13,597,436	214,895	2.2%	1.6%
West South Central	24,853,901	462,609	2.6%	1.9%
Mountain	15,030,720	450,808	3.7%	3.0%
Pacific	34,529,689	1,251,837	4.5%	3.7%
Alaska	484,754	45,261	10.7%	9.3%
Not Available	745,757	45,261	7.3%	6.1%
Less than 100,000	29,429,442	531,938	2.6%	1.8%
100,000 to 499,999	36,551,501	1,139,406	4.2%	3.2%
500,000 to 1,999,999	52,335,815	1,418,123	3.6%	2.7%
2,000,000 or more	103,783,753	3,734,586	4.5%	3.7%

Board and Bladers are most likely to live in Alaska, North Dakota, New Hampshire, District of Columbia, Vermont and Minnesota. They are least likely to reside in Montana, West Virginia, Alabama, Arkansas, Tennessee and Kentucky (see Fig. 3 on next page).

Demographic Profile

Board and Bladers tend to be male and between the ages of 18 and 44. The majority are married and they are more likely than the average U.S. Pleasure Traveler to have dependent children (under 18) living at home. Board and Bladers are more likely to have a university education and above-average household incomes relative to the average U.S. Pleasure Traveler.

Fig. 4 Demographic Profile of Board and Bladers Relative to All U.S. Pleasure Travelers

		Board and Bladers	Non-Board and Bladers ¹	Pleasure Travelers	Index ²
Attribute	Size of Market	6,869,316	163,640,925	170,510,241	100
Gender	Male	51.0%	48.4%	48.5%	105
	Female	49.0%	51.6%	51.5%	95
Age of Respondent	18 to 24	21.5%	10.4%	10.8%	198
	25 to 34	29.4%	20.6%	21.0%	140
	35 to 44	19.3%	17.2%	17.3%	112
	45 to 54	18.6%	21.1%	21.0%	89
	55 to 64	7.0%	15.8%	15.5%	46
	65 Plus	4.1%	14.9%	14.4%	29
Average Age		36.8	45.8	45.4	N/A
Marital Status	Not married	37.3%	30.3%	30.5%	122
	Married	62.7%	69.7%	69.5%	90
Parental Status	No children under 18	59.8%	70.4%	70.0%	85
	Children under 18	40.2%	29.6%	30.0%	134
Education	High school or less	15.2%	20.7%	20.5%	74
	Trade, Technical, Community Col.	18.6%	21.5%	21.4%	87
	University Degree	45.9%	40.8%	41.1%	112
	Post Graduate Degree	20.2%	16.9%	17.1%	119
Household Income	Under \$20,000	5.2%	8.2%	8.1%	65
	\$20,000 to \$39,999	12.1%	16.4%	16.2%	75
	\$40,000 to \$59,999	14.9%	16.8%	16.7%	89
	\$60,000 to \$79,999	16.6%	14.6%	14.7%	113
	\$80,000 to \$99,999	11.7%	11.6%	11.6%	101
	\$100,000 to \$149,999	15.7%	14.3%	14.4%	109
	\$150,000 or more	9.7%	6.6%	6.7%	145
	Not stated	14.1%	11.6%	11.7%	120
Average Household Income		\$84,200	\$73,900	\$74,303	N/A

- 1 - "Non-Board and Bladers" are 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 participate in blade and boarding activities on any trip. The numbers of Board and Bladers and Non-Board and Bladers equal the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Board and Bladers in each group by the percent of U.S. Pleasure Travelers in each group. The Index indicates the extent to which Board and Bladers are over or under-represented relative to the average U.S. Pleasure Traveler. An index of 100 means the percent participating in the activity is the same as that of the average U.S. Pleasure Traveler. Index values over 100 indicate that those participating in the activity are over-represented relative to the average U.S. Pleasure Traveler. Index values less than 100 indicate that those participating in the activity are under-represented relative to the average U.S. Pleasure Traveler.

Travel Activity (During Last Two Years)

Board and Bladers were more likely than the average U.S. Pleasure Traveler to have taken trips both within their own state and to other U.S. states in the past two years. They were also more likely to have visited Mexico, the Caribbean and overseas destinations.

Board and Bladers were much more likely than the average U.S. Pleasure Traveler to have taken a trip to Canada in the past two years (26.5% versus 14.6%). They were especially likely to have taken trips to Ontario (17.9%), Quebec (7.6%) and British Columbia (7.0%). In relative terms, they were more likely than the average U.S. Pleasure Traveler to have visited all of the Canadian provinces or territories, and especially Newfoundland and Labrador, Manitoba, Saskatchewan and Prince Edward Island.

Fig. 5 Percent Traveling to Canada and Other Destinations during Past Two Years

	Board and Bladers	Non-Board and Bladers	Pleasure Travelers	Index
Size of Market	6,869,316	163,640,925	170,510,241	100
All destinations	95.5%	85.0%	85.4%	112
Canada	26.5%	14.1%	14.6%	182
Newfoundland and Labrador	1.4%	0.4%	0.4%	335
Prince Edward Island	1.8%	0.6%	0.6%	288
New Brunswick	1.6%	0.8%	0.8%	202
Nova Scotia	2.8%	1.3%	1.3%	213
Quebec	7.6%	2.9%	3.1%	244
Ontario	17.9%	7.9%	8.3%	217
Manitoba	1.4%	0.5%	0.5%	268
Saskatchewan	1.4%	0.4%	0.5%	280
Alberta	2.5%	1.1%	1.2%	204
British Columbia	7.0%	4.0%	4.1%	170
Yukon	1.3%	0.5%	0.6%	221
Northwest Territories	0.8%	0.4%	0.4%	202
Nunavut	0.1%	0.0%	0.0%	205
Own State	90.9%	79.2%	79.7%	114
Other parts of the U.S.	95.2%	90.4%	90.6%	105
Mexico	24.9%	13.1%	13.6%	183
Caribbean	19.7%	12.4%	12.7%	154
All other destinations	16.6%	9.3%	9.6%	174

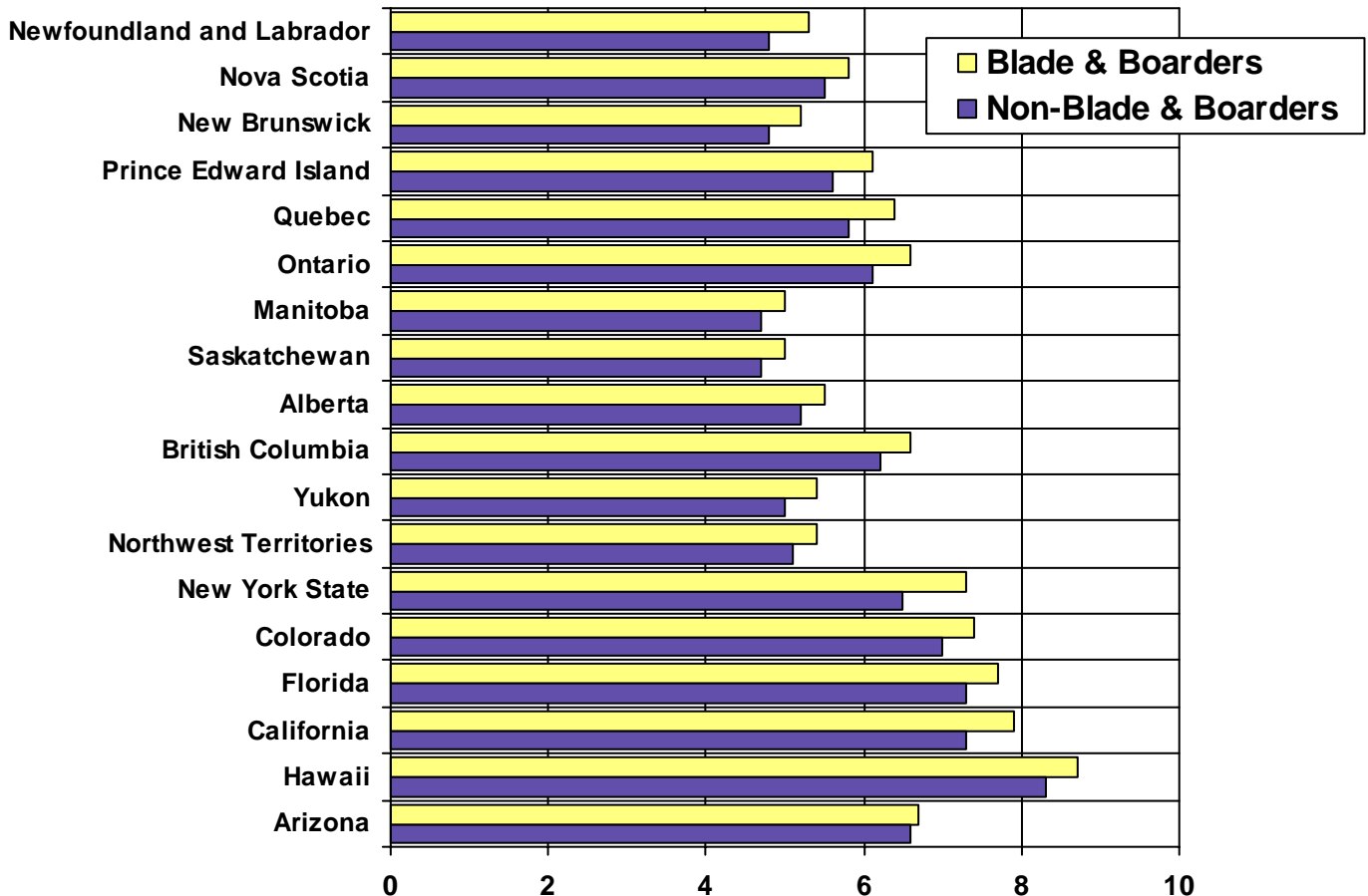
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Overall, the appeal ratings of Board and Bladers tended to be higher than the ratings of non-participants regardless of the destination. Ontario and British Columbia (both 6.6) were rated as the most appealing Canadian provinces, followed by Quebec (6.4) and Prince Edward Island (6.1).

U.S. American Pleasure Travelers as a whole tended to rate the six reference U.S. states as more appealing than any of the Canadian provinces or territories. Hawaii (8.7) received the highest rating among Board and Bladers.

Fig. 6 Overall Rating of Appeal 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

Board and Bladers were much more likely than the average U.S. Pleasure Traveler to have participated in a wide range of outdoor activities while on trips. Most Board and Bladers participated in ocean activities, games and individual sports, wildlife viewing, boating and swimming, and hiking, climbing and paddling while on at least one trip in the past two years. Relative to the average U.S. Pleasure Traveler, Board and Bladers were especially more likely to have engaged in the most strenuous outdoor activities while on a trip, including extreme skiing and air sports, cross-country skiing and snowshoeing, downhill skiing and snowboarding, cycling, and team sports.

In part, these patterns reflect the fact that this segment consists primarily of young males with above-average incomes; attributes that tend to be associated with higher levels of outdoor physical activity.

Fig. 7 Other Outdoor Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Outdoor Activity)

	Board and Bladers	Non-Board and Bladers	Pleasure Travelers	Index
Size of Market	6,869,316	163,640,925	170,510,241	100
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	71.5%	38.2%	39.6%	181
Games & Individual Sports (e.g., tennis, board games)	58.3%	20.7%	22.2%	262
Wildlife Viewing	57.4%	34.0%	34.9%	164
Boating & Swimming (e.g., motorboating, swimming in lakes)	54.3%	19.6%	21.0%	258
Hiking, Climbing & Paddling	53.0%	22.2%	23.5%	226
Exercising & Jogging	39.4%	13.0%	14.1%	280
Downhill Skiing & Snowboarding	35.1%	6.9%	8.0%	437
Fishing	33.7%	17.8%	18.4%	183
Team Sports (e.g., football, baseball, basketball)	29.6%	7.0%	7.9%	375
Cycling	26.1%	5.5%	6.3%	412
Horseback Riding	22.8%	5.5%	6.2%	370
Golfing	22.8%	10.2%	10.7%	214
Snowmobiling & ATVing	21.8%	6.5%	7.1%	306
Sailing and Surfing (e.g., sailing, windsurfing, parasailing)	17.3%	4.2%	4.8%	363
Scuba & Snorkelling	14.8%	3.6%	4.1%	365
Hunting	10.5%	5.2%	5.4%	194
Cross-country Skiing & Snowshoeing	10.0%	1.5%	1.9%	535
Extreme Air Sports (e.g., parachuting, bungee jumping)	9.5%	1.4%	1.7%	552
Motorcycling	9.3%	2.8%	3.1%	306
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	2.6%	0.2%	0.3%	776

Outdoor Activities Pursued While Not on Trips

The very high level of activity among Board and Bladers while on trips is also apparent when they are NOT traveling. The majority of Board and Bladers went on day outings to parks, went swimming, exercised at home or at a fitness club, went picnicking, gardened at home and went hiking. In addition to ice skating, rollerblading and skateboarding, Board and Bladers were much more likely than the average U.S. Pleasure Traveler to include downhill and cross-country skiing, snowboarding, snowmobiling, and canoeing and kayaking among their activities when not on a trip.

Fig. 8 Outdoor Activities Pursued While NOT on Trips

	Board and Bladers	Non-Board and Bladers	Pleasure Travelers	Index
Size of Market	6,869,316	163,640,925	170,510,241	100
Day outing to a park	78.1%	62.5%	63.1%	124
Swimming	76.8%	55.7%	56.5%	136
Exercising at home or at a fitness club	69.9%	55.5%	56.0%	125
Picnicking	59.2%	47.3%	47.7%	124
Gardening	52.7%	53.1%	53.1%	99
Hiking	50.8%	31.7%	32.5%	156
Cycling	44.7%	22.0%	22.9%	195
Camping	41.1%	26.1%	26.7%	154
Jogging	40.9%	18.6%	19.5%	210
Fishing	40.1%	32.4%	32.8%	122
Playing team sports	35.7%	15.0%	15.8%	226
Rollerblading	33.5%	6.2%	7.3%	457
Ice-skating	32.4%	4.4%	5.5%	588
Sailing or other boating	32.3%	19.4%	20.0%	162
Playing racquet sports (e.g., tennis or badminton)	31.1%	12.4%	13.2%	236
Hunting	29.4%	17.8%	18.3%	161
Canoeing or kayaking	20.3%	7.3%	7.8%	258
Downhill skiing	20.3%	5.1%	5.7%	355
Horseback riding	20.1%	8.1%	8.6%	234
Riding an all-terrain vehicle (ATV)	19.6%	11.1%	11.5%	170
Skateboarding	15.7%	1.6%	2.2%	717
Hunting	14.6%	11.7%	11.8%	124
Snowboarding	13.1%	2.3%	2.7%	487
Snowmobiling	9.7%	3.0%	3.3%	294
Cross-country skiing	9.1%	2.2%	2.5%	361

Culture and Entertainment Activities Pursued While on Trips

Board and Bladers were much more likely than the average U.S. Pleasure Traveler to attend professional sporting events, amateur tournaments, and national and international sporting events. They were more likely than the average U.S. Pleasure Traveler to have attended theatre, film and music festivals, rock concerts, and high art performances and to have taken part in participatory historical activities and agro-tourism while on trips.

Fig. 9 Cultural and Entertainment Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Culture & Entertainment Activity)

	Board and Bladers	Non-Board and Bladers	Pleasure Travelers	Index
Size of Market	6,869,316	163,640,925	222,846,268	100
Shopping and Dining	89.9%	77.2%	60.4%	149
Theme Parks & Exhibits	79.1%	47.7%	37.8%	209
Fairs and Festivals	71.6%	39.7%	31.7%	226
Historical Sites, Museums & Art Galleries	71.5%	52.7%	40.9%	175
Casino, Theatre and Comedy Clubs	64.5%	44.6%	35.1%	184
Fine Dining and Spas	52.2%	32.1%	25.5%	204
Science and Technology Exhibits	51.7%	23.7%	19.1%	270
Rock Concerts and Recreational Dancing	42.9%	14.1%	11.8%	364
Professional Sporting Events	42.7%	15.0%	12.5%	342
Wine, Beer and Food Tastings	41.2%	22.2%	17.7%	233
Agro-Tourism	32.5%	12.7%	10.4%	311
Equestrian & Western Events	30.4%	14.8%	12.0%	254
High Art Performances	28.8%	10.2%	8.5%	340
Garden Theme Attractions	28.4%	13.1%	10.5%	269
Theatre, Film & Musical Festivals	26.5%	7.5%	6.5%	410
Amateur Tournaments	21.8%	7.1%	5.9%	369
Aboriginal Cultural Experiences	19.4%	8.1%	6.6%	293
Archaeological Digs & Sites	11.8%	5.3%	4.2%	277
National & International Sporting Events	10.4%	1.5%	1.4%	720
Participatory Historical Activities	9.9%	3.7%	3.0%	327

Culture and Entertainment Activities Pursued While Not on Trips

Board and Bladers were more likely than the average U.S. Pleasure Traveler to pursue culture and entertainment activities while NOT traveling. Similar to their pattern of activity undertaken when on a trip, Board and Bladers were more likely than average to participate in sports-oriented activities (e.g., amateur sporting events, professional sporting events) and music-oriented activities (e.g., rock music concerts, bars with live pop or rock bands, classical music concerts, jazz clubs, ballet, opera) when not on a trip. Most in this segment also visited restaurants, festivals and fairs, zoos or aquariums, and amusement or theme parks when not traveling.

Fig. 10 Cultural and Entertainment Activities Pursued While Not on Trips

	Board and Bladers	Non-Board and Bladers	Pleasure Travelers	Index
Size of Market	6,869,316	163,640,925	170,510,241	100
Going out to eat in restaurants	93.5%	92.8%	92.8%	101
Going to festivals or fairs	74.9%	65.1%	65.5%	114
Going to zoos or aquariums	58.7%	45.1%	45.6%	129
Going to amateur sporting events	57.9%	39.1%	39.9%	145
Going to professional sporting events	55.3%	34.0%	34.9%	158
Going to amusement or theme parks	54.6%	37.4%	38.1%	143
Going to museums	48.3%	37.0%	37.5%	129
Going to historic sites or heritage buildings	47.7%	39.8%	40.1%	119
Going to rock music concerts	43.1%	20.4%	21.3%	202
Going to bars with live pop or rock bands	42.9%	22.7%	23.6%	182
Going to art galleries or art shows	39.2%	27.3%	27.8%	141
Going to pick-your-own farms or farmers' market	38.3%	31.3%	31.6%	121
Going to live theatre	37.9%	28.8%	29.2%	130
Going dancing	35.4%	20.2%	20.8%	170
Going to gamble in casinos	29.9%	27.9%	28.0%	107
Going to botanical gardens	24.8%	19.8%	20.0%	124
Going to classical music concerts	22.6%	14.6%	14.9%	151
Staying overnight in a hotel or B&B in own city	19.0%	10.2%	10.6%	180
Going to day spas	17.7%	10.0%	10.3%	172
Going to jazz clubs	14.9%	7.6%	7.9%	189
Going to the ballet	14.2%	6.7%	7.0%	202
Going to rodeos	12.2%	8.0%	8.2%	148
Going to the opera	9.9%	5.6%	5.7%	173

Accommodations Stayed In While on Trips

Board and Bladers were most likely to have stayed at seaside resorts or at public campgrounds during trips taken in the past two years. They were also much more likely than the average U.S. Pleasure Traveler to have stayed at a ski or mountain resort, health spa, and country inn or resort with a gourmet restaurant. As well, Board and Bladers were much more likely than the average U.S. Pleasure Traveler to have stayed at the more specialized types of accommodations in the past two years (including a wine tasting or cooking school, a remote or fly-in wilderness outpost or lodge, a houseboat, a farm or guest ranch).

Fig. 11 Accommodations Stayed In While on Trips

	Board and Bladers	Non-Board and Bladers	Pleasure Travelers	Index
Size of Market	6,869,316	163,640,925	170,510,241	100
Seaside Resort	47.4%	37.1%	37.7%	126
A Public Campground in a National, State, Provincial or Municipal Park	47.2%	34.0%	34.8%	135
Ski Resort or Mountain Resort	36.8%	17.3%	18.4%	200
Lakeside / Riverside Resort	35.6%	24.9%	25.6%	139
A Private Campground	27.9%	20.5%	20.9%	133
A Camp Site in a Wilderness Setting (Not a Campground)	17.1%	9.2%	9.6%	177
Health Spa	14.4%	5.9%	6.5%	224
Wilderness Lodge You Can Drive to by Car	10.7%	7.0%	7.2%	149
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	10.3%	8.6%	8.7%	118
Country Inn or Resort with Gourmet Restaurant	8.4%	3.8%	4.1%	206
On a Houseboat	8.2%	2.6%	2.9%	281
Farm or Guest Ranch	8.0%	3.9%	4.1%	194
Cooking School	4.2%	1.0%	1.2%	352
Remote or Fly-In Wilderness Lodge	4.0%	1.5%	1.7%	238
Remote or Fly-In Wilderness Outpost	2.8%	0.8%	0.9%	313
Wine Tasting School	2.4%	0.8%	0.9%	274

Tours and Cruises Taken During Past Two Years

Board and Bladers were more likely than the average U.S. Pleasure Traveler to have taken each of the types of tours or cruises during the past two years. They were especially more likely than the average U.S. Pleasure Traveler to have taken self-guided tours (e.g., sameday tour, overnight tour), wilderness tours, tours of casinos, wineries and factories, and air tours on an airplane or helicopter. They were also much more likely than the average U.S. Pleasure Traveler to have taken ocean cruises (e.g., Caribbean cruise, Alaskan cruise) and specialized cruises (e.g., Great Lakes cruise, St. Lawrence River cruise, a submarine cruise) during the past two years.

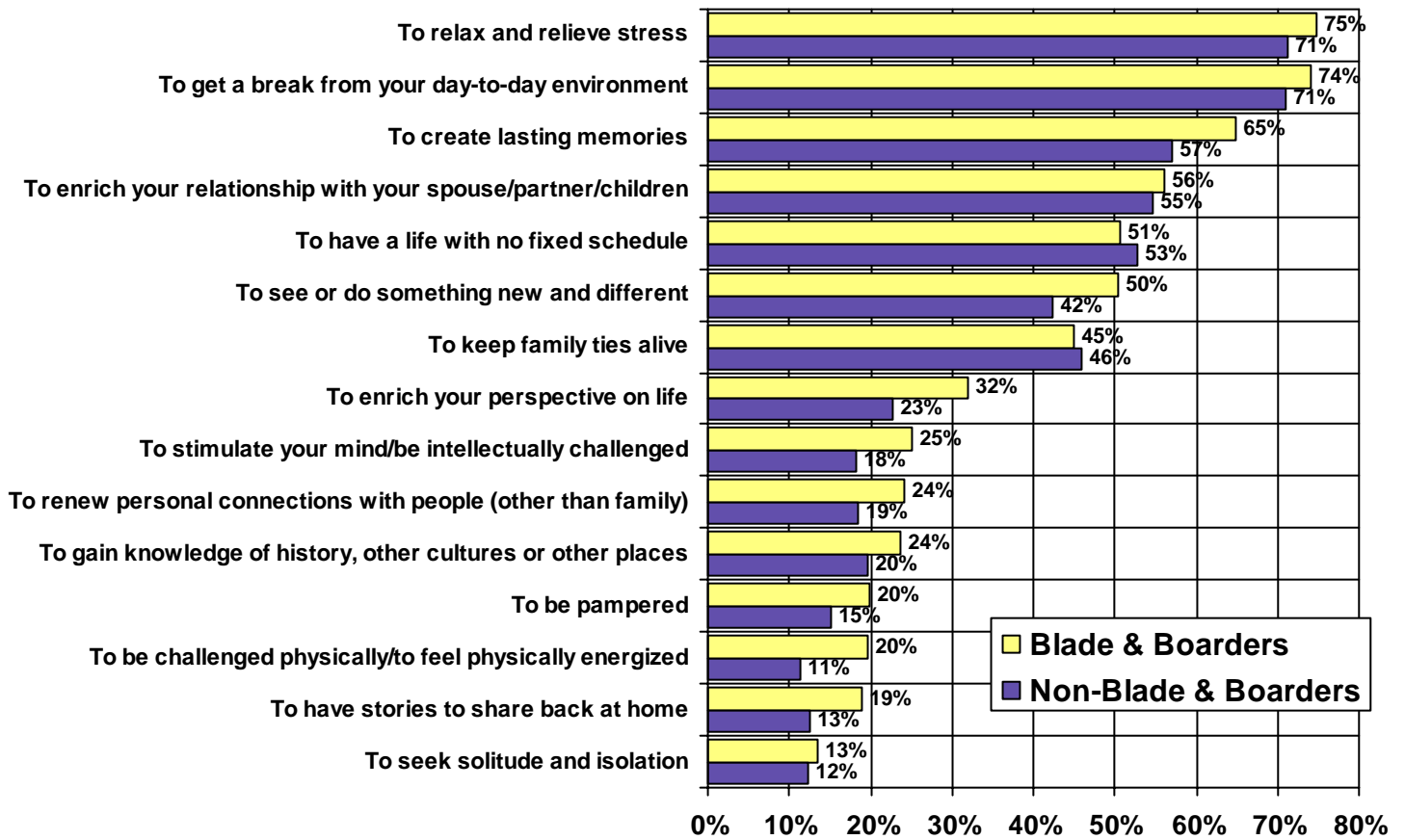
Fig. 12 Tours and Cruises Taken During Past Two Years

	Board and Bladers	Non-Board and Bladers	Pleasure Travelers	Index
Size of Market	6,869,316	163,640,925	170,510,241	100
A self-guided sameday tour while on an overnight trip	30.2%	18.7%	19.2%	157
An organized sameday guided tour while on an overnight trip	23.6%	18.3%	18.5%	127
Around the city	22.9%	15.5%	15.8%	145
A self-guided overnight tour where you stayed in different locations	19.7%	10.0%	10.4%	189
Around the country side – scenic drives	19.5%	12.8%	13.1%	149
Caribbean ocean cruise	14.4%	8.8%	9.0%	160
Wilderness tour	14.2%	7.2%	7.4%	191
On the water (sightseeing cruise)	13.4%	7.5%	7.8%	172
Some other type of tour	13.2%	8.6%	8.8%	149
An organized overnight guided tour where you stayed in a single location	12.6%	6.5%	6.7%	187
An organized overnight guided tour where you stayed in different locations	11.8%	7.7%	7.9%	149
To a casino	9.9%	4.7%	4.9%	203
To a winery	8.9%	3.4%	3.6%	249
Ocean cruise – Other	8.2%	4.7%	4.8%	171
To a factory	3.9%	1.7%	1.8%	216
Alaskan ocean cruise	3.9%	2.4%	2.5%	156
Some other type of cruise	3.5%	1.6%	1.7%	206
In the air as a pilot or passenger of an airplane or helicopter	3.5%	1.3%	1.4%	246
Cruise on another lake or river	3.3%	1.9%	2.0%	168
Great Lakes cruise	1.9%	0.3%	0.4%	482
Cruise on the St. Lawrence River	0.7%	0.3%	0.3%	252
Submarine cruise	0.5%	0.2%	0.2%	194

Benefits Sought While on Vacation

Most Board and Bladers take a vacation in order to relax and relieve stress, get a break from their day-to-day environment, create lasting memories, enrich family relationships, live without a fixed schedule, and to see or do something new and different. Compared to the average U.S. Pleasure Traveler, Board and Bladers consider it more important that they have memorable vacation experiences (e.g., create lasting memories, have stories to share back home). They also consider it more important than the average U.S. Pleasure Traveler that their vacations are intellectually stimulating, physically challenging and allow opportunities to renew personal connections with friends.

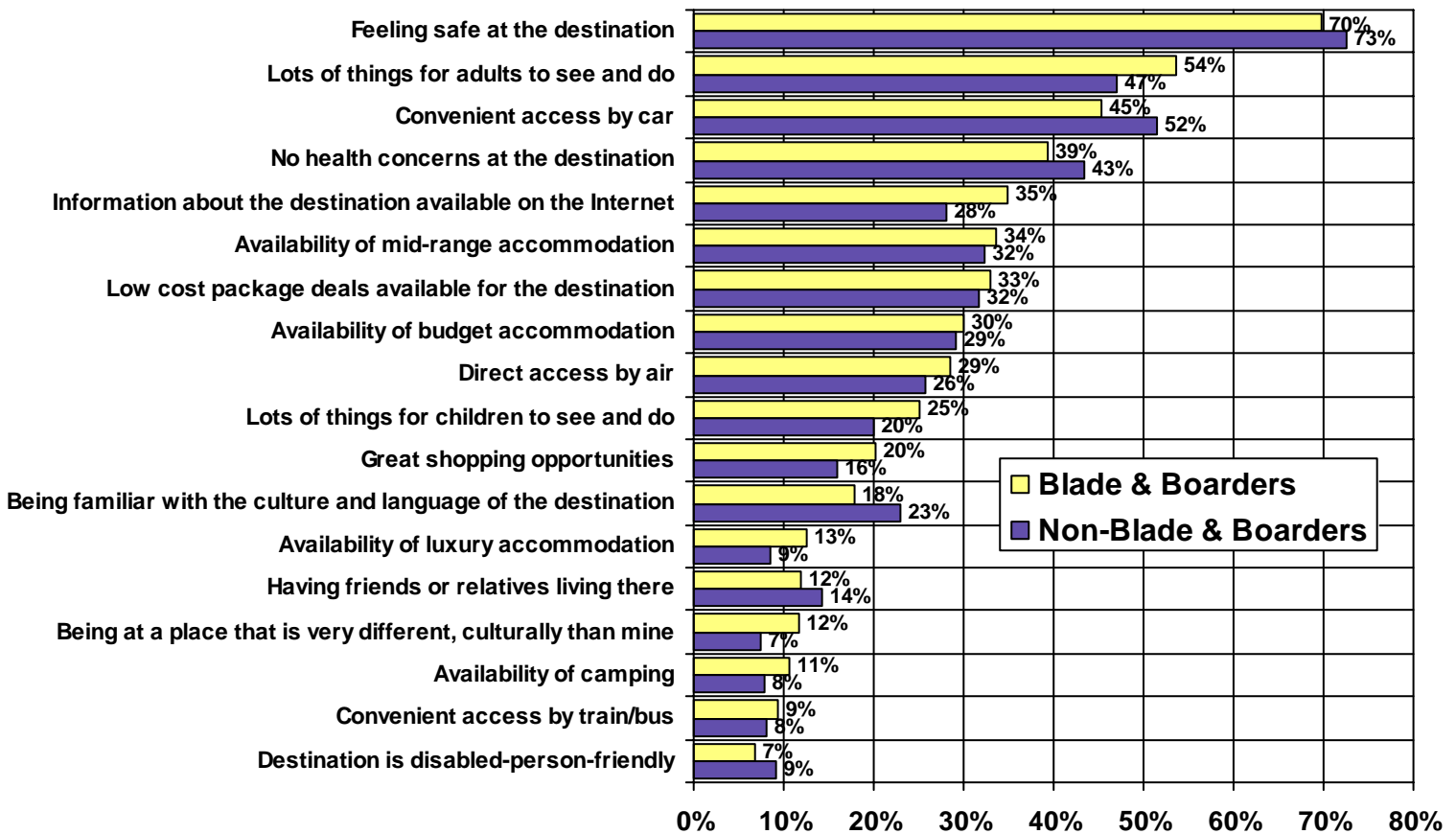
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

The majority of Board and Bladers consider safety and having lots of things for adults to see and do as the most important attributes of a vacation destination. They consider it more important than the average U.S. Pleasure Traveler that a destination offers lots of things to see and do for both adults and children and that information about the destination is available on the Internet.

Fig. 14 Importance of Destination Attributes (% Rating Each Attribute as “Highly Important”)



How Destinations Are Selected

Similar to the average U.S. Pleasure Traveler, the majority of Board and Bladers start planning their trips with a particular destination in mind. However, they are more likely than the average U.S. Pleasure Traveler to begin their vacation planning by considering what specific activities they like to do while on vacation (especially for winter trips). They are also more likely than average to look for a package deal without having a specific destination in mind.

Fig. 15 How Destinations Are Selected (Summer and Winter Vacations)

	Board and Bladers	Non-Board and Bladers	Pleasure Travelers	Index
Size of Market	6,869,316	163,640,925	170,510,241	100
Summer				
Started with a desired destination in mind	56.5%	58.3%	58.2%	97
Started by considering specific activities wanted to do	11.7%	9.8%	9.9%	118
Started with a certain type of vacation experience in mind	18.1%	17.3%	17.3%	105
Looked for packaged deals - no destination in mind	2.2%	1.1%	1.1%	201
Considered something else first	3.8%	4.6%	4.6%	82
Don't Know / Other	7.7%	8.9%	8.9%	87
Winter				
Started with a desired destination in mind	52.3%	59.3%	58.9%	89
Started by considering specific activities wanted to do	21.2%	10.7%	11.3%	188
Started with a certain type of vacation experience in mind	13.6%	14.8%	14.8%	92
Looked for packaged deals - no destination in mind	1.9%	1.4%	1.4%	132
Considered something else first	3.5%	5.5%	5.3%	65
Don't Know / Other	7.5%	8.3%	8.3%	91

Trip Planning and Information Sources Consulted

Similar to the average U.S. Pleasure Traveler, just over one-half of Board and Bladers (56.6%) participate in planning their vacations. The most frequently consulted source of information is the Internet, followed by past experiences and the advice of family and friends. Relative to the average U.S. Pleasure Traveler, they are more likely to obtain travel information from television programs and advertising, and newspaper / magazine articles and advertising as well as trade, travel and sports shows and electronic newsletters.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Board and Bladers	Non-Board and Bladers	Pleasure Travelers	Index
Size of Market		6,869,316	163,640,925	170,510,241	100
Who Plans Trips?	Respondent plans trips	40.5%	39.1%	39.2%	103
	Trip planning a shared responsibility	16.1%	17.7%	17.6%	92
	Someone else plans trips	43.3%	43.2%	43.2%	100
Information Sources Consulted	An Internet website	88.0%	75.5%	76.0%	116
	Past experience / Been there before	60.8%	54.2%	54.5%	112
	Advice of others / Word-of-mouth	60.1%	44.7%	45.4%	132
	Maps	39.2%	32.4%	32.7%	120
	Visitor information centres	31.3%	19.9%	20.4%	154
	An auto club such as AAA	30.7%	23.7%	24.0%	128
	Official travel guides or brochures from state / province	30.5%	20.1%	20.6%	148
	Articles in newspapers / magazines	29.8%	17.6%	18.1%	164
	A travel agent	27.9%	18.2%	18.6%	150
	Travel information received in the mail	22.1%	15.5%	15.8%	140
	Advertisements in newspapers / magazines	20.4%	10.5%	10.9%	188
	Travel guide books such as Fodor's	18.0%	11.7%	12.0%	150
	Programs on television	14.1%	6.8%	7.1%	198
	An electronic newsletter or magazine received by e-mail	11.7%	5.8%	6.0%	195
	Advertisements on television	9.1%	3.8%	4.0%	227
Visits to trade, travel or sports shows	5.5%	2.3%	2.4%	224	

Use of the Internet to Plan and Arrange Trips

Most Board and Bladers use the Internet for planning a trip (70.6%) and they are more likely than the average U.S. Pleasure Traveler to have booked at least part of a trip online (62.4%).

The majority of Board and Bladers use travel planning / booking sites such as Expedia, and hotel and airline sites. They are also more likely than the average U.S. Pleasure Traveler to use cruise line websites.

Three-quarters of Board and Bladers have booked airline tickets or accommodations for a trip over the Internet. They are also more likely than the average U.S. Pleasure Traveler to have used the Internet to purchase other trip components including vacation packages, rail, bus or boat / ship fares and tickets for specific attractions.

Fig. 17 Use of the Internet to Plan and Book Travel

		Board and Bladers	Non-Board and Bladers	Pleasure Travelers	Index
Size of Market		6,869,316	163,640,925	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	19.3%	31.5%	31.0%	62
	Uses Internet to plan trips only	18.2%	20.2%	20.1%	91
	Uses Internet to book part of trip	62.4%	48.4%	48.9%	128
Types of Websites Consulted	A travel planning / booking website	68.0%	55.0%	55.6%	122
	A website of a hotel or resort	59.1%	53.0%	53.3%	111
	An airline's website	54.8%	45.1%	45.6%	120
	A website of an attraction	46.0%	32.7%	33.4%	138
	A tourism website of a country / region / city	42.0%	34.8%	35.1%	120
	Some other website	30.7%	24.8%	25.1%	122
	A cruise line website	17.7%	12.2%	12.4%	143
	A motorcoach website	1.5%	1.3%	1.3%	113
Parts of Trips Booked Over The Internet	Air tickets	77.3%	70.2%	70.6%	110
	Accommodations	76.7%	71.6%	71.9%	107
	Car rental	44.7%	37.6%	38.0%	118
	Tickets or fees for specific activities or attractions	40.0%	25.6%	26.3%	152
	A package containing two or more items	27.4%	17.3%	17.8%	154
	Tickets for rail, bus or boat / ship fares	19.1%	11.5%	11.9%	161
	Other	3.4%	2.9%	2.9%	116

Media Consumption Habits

Board and Bladers are more likely than the average U.S. Pleasure Traveler to visit travel-related websites, read travel magazines and watch travel-related television shows. The majority of Board and Bladers also frequently or occasionally read the travel section of the weekend newspaper. This activity segment is also more likely than the average U.S. Pleasure Traveler to consume sports-related media. They are also more likely to read magazines on photography and video, city or regional lifestyles, and computers, electronics and technology. They listen to a variety of radio programs including multicultural, Top 40 / current hits and modern or alternative rock music.

Fig. 18 Media Consumption Habits

		Board and Bladers	Non-Board and Bladers	Pleasure Travelers	Index
Size of Market		6,869,316	163,640,925	170,510,241	100
Newspaper Readership	Reads daily newspaper	57.6%	60.0%	59.9%	96
	Reads weekend edition of newspaper	57.3%	55.5%	55.5%	103
	Reads local neighbourhood or community newspapers	53.0%	49.4%	49.5%	107
	Reads other types of newspapers	20.6%	13.6%	13.9%	149
	Frequently or occasionally reads travel section of daily newspaper	46.9%	42.8%	43.0%	109
	Frequently or occasionally reads travel section of weekend newspaper	56.0%	49.0%	49.3%	114
Types of Magazines Read (Top 5 Indexed)	Photography and video	8.0%	3.7%	3.9%	205
	Professional sports	23.7%	12.2%	12.6%	187
	Magazines about your city	12.7%	6.7%	6.9%	183
	Travel (e.g., Condé Nast)	18.9%	10.3%	10.6%	177
	Computers, electronics and technology	21.3%	12.0%	12.4%	173
Type of Television Programs Watched (Top 5 Indexed)	Music/Music video shows / channels	39.3%	27.6%	28.1%	140
	Late night talk shows	35.9%	26.7%	27.1%	133
	Travel shows	35.2%	28.7%	28.9%	122
	Reality shows (e.g., American Idol)	47.1%	39.2%	39.5%	119
	Situation comedies (e.g., Friends)	58.6%	51.2%	51.5%	114
Type of Radio Programs Listened To (Top 5 Indexed)	Multicultural	9.0%	4.6%	4.7%	189
	Top 40 / Current hits	41.5%	25.4%	26.1%	159
	Modern rock / Alternative rock	50.9%	32.1%	32.9%	155
	All sports	17.4%	11.7%	11.9%	146
	Classical music	17.7%	14.0%	14.1%	125
Types of Websites Visited (Top 5 Indexed)	Magazine sites	22.4%	14.4%	14.8%	151
	Sports	41.2%	29.4%	30.0%	137
	Entertainment	68.0%	53.1%	53.7%	127
	Sites for specific activities or interests	40.8%	32.1%	32.5%	125
	Travel	59.6%	47.4%	48.0%	124

Appendix One: U.S. 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	White Water Rafting
	Hiking /Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
	Ice Climbing	Wilderness Skills Courses
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkelling in Sea /Ocean
	Sunbathing, Sitting on a Beach	Ocean Kayaking or Canoeing
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Scuba & Snorkelling	Scuba Diving in Lakes /Rivers	Scuba Diving in Sea /Ocean
	Snorkelling 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	Snowshoeing
Extreme Skiing	Heli-Skiing	Cross Country or Back Country as an Overnight Touring Trip
	Ski Jouring	
Hockey, Skating, Rollerblading & Skateboarding	Ice-Hockey	In-Line /Rollerblading
	Ice-Skating	Skateboarding
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	Bungee Jumping
Team Sports	Football	Basketball
	Baseball or Softball	Soccer
Games & Individual Sports	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	

Appendix Two U.S. 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
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	Went to Local Outdoor Cafes
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	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Food/Drink Festivals	Circus
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	Wax Museums
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	Jazz Concert
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	
Theatre, Film & Musical Festivals	Theatre Festivals	International Film Festivals
	Comedy Festivals	Music Festivals
	Literary Festivals or Events	
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)
Casino, Theatre & Comedy Clubs	Stand-Up Comedy Clubs and Other Variety Shows	Live Theatre with Dinner
	Went to a Casino	Live Theatre
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National/Provincial Park
	Curatorial Tours	
National & International Sporting Events	National/International Sporting Events such as the Olympic Games	Curling Bonspiel
	Professional Figure Skating	Professional Soccer Games

Appendix Two		
U.S. TAMS 2006 Culture and Entertainment Segmentation		
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Rock Concerts & Dancing	Rock & Roll / Popular Music Concert	Recreational Dancing
Archaeological Digs & Sites	Archaeological Digs	Paleontological / Archaeological Sites
Equestrian & Western Events	Equine (Horse) Competitions	Country / Western Music Concerts
	Western Theme Events (e.g., Rodeos)	Auto Races
	Horse Races	
Fine Dining & Spas	High-End Restaurants with an International Reputation	Day Visit to a Health and Wellness Spa while on an Overnight Trip
	Other High-End Restaurants	
Agro-Tourism	Dining At A Farm	Harvesting and /or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	Entertainment Farms (e.g., Corn Maze, Petting Barnyard)
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related