

U.S. TRAVEL MARKET

**Boating and Swimming While on Trips
Of One or More Nights**

A Profile Report

May 15, 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, 16.2% (35,876,397) of adult Americans participated in freshwater boating and swimming activities while on an out-of-town, overnight trip of one or more nights. Swimming in lakes (12.6%) was the most popular activity, followed by motorboating (7.0%) and waterskiing (2.9%). 28.2% (10,100,110) of Boaters and Swimmers reported that this activity was the main reason for taking at least one trip in the past two years.

The majority of Boaters and Swimmers are 18 to 44 years of age and married. They are more likely than the average U.S. Pleasure Traveler to have dependent children (under 18) living at home. Their household income (\$80,870) and level of education (60.7% university graduate) tends to be slightly above-average. They are over-represented in Alaska and the West North Central, East North Central and New England regions of the United States.

Over the past two years, Boaters and Swimmers traveled more frequently than the average U.S. Pleasure Traveler and were somewhat more likely to have taken a trip to Canada (19.6% versus 14.6%). The most common destination was Ontario, however Boaters and Swimmers are over-represented among U.S. Pleasure Travelers to all Canadian provinces and territories.

Boaters and Swimmers were much more likely than the average U.S. Pleasure Traveler to engage in a wide range of outdoor activities while on trips in the past two years. They were particularly likely to participate in other water-based activities (e.g., hiking, climbing and paddling; sailing and surfing; scuba and snorkelling), sportsmen activities (e.g., fishing; hunting) and winter activities (e.g., downhill skiing and snowboarding; snowmobiling and ATVing). Boaters and Swimmers tend to stay at public campgrounds, or at lakeside or riverside resorts when on a trip. They are also more likely than average to have taken a sightseeing cruise, lake or river cruise or a Great Lakes cruise. Relative to the average U.S. Pleasure Traveler, Boaters and Swimmers are more likely to go shopping and dining and to visit theme parks and exhibits, historical sites, and fairs and festivals. Boaters and Swimmers tend to seek family-oriented vacations that allow them to enrich family relationships and provide lots of things to see and do for both adults and children.

Most Boaters and Swimmers use the Internet for trip planning (76.6%) and have booked trip components online (54.8%) in the past two years. They are more likely than average to consult official tourism guides and visitor centres. This segment can be targeted most effectively through travel-related websites and magazines and specialty magazines (e.g., outdoor activity and sports, photography and video, family and parenting).

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 those who went boating or swimming 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.

Boating and Swimming While on Trips

Market Incidence

Over the last two years, 16.2% (35,876,397) of adult Americans went fresh water boating and swimming while on an out-of-town, overnight trip of one or more nights. Swimming in lakes was the most popular activity (12.6%), followed by motorboating (7.0%) and waterskiing (2.9%). 1.3% of adult Americans participated in all three activities while on trips in the past two years.

28.2% of those who went boating and swimming while on trips (10,100,110 adult Americans) reported that this activity was the main reason for taking at least one trip in the past two years. Waterskiing (30.5%) was slightly more likely to have been the main reason for taking a trip than motorboating (24.2%) or swimming in lakes (24.2%).

Fig. 1 Incidence of Boating and Swimming While on Trips¹

Size of Market	Number of Boaters and Swimmers ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total U.S. Population ⁵
Boating and Swimming (All Activities)	35,876,397	28.2%	21.0%	16.2%
Swimming in lakes	27,787,182	24.2%	16.3%	12.6%
Motorboating	15,609,201	27.0%	9.2%	7.0%
Waterskiing	6,549,380	30.5%	3.8%	2.9%
Participated in all three activities	2,923,262	16.7%	1.7%	1.3%

- 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 - "Boaters and Swimmers" are defined as individuals who participated in boating or swimming activities 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 U.S. Adult Market who participated in each activity on a trip during the past two years.

Incidence by Region, State and Population Size

Boaters and Swimmers tend to be over-represented relative to the average U.S. Pleasure Traveler among those living in Alaska and the West North Central, East North Central and New England regions of the United States. They are well-represented in communities of all sizes.

Fig. 2 Geographic Distribution and Population Size of Those Who Went Boating and Swimming While on Trips

	Total Population	Estimated Number Who Went Boating or Swimming on a Trip	Percent of Pleasure Travelers in Region Boating or Swimming on a Trip	Percent of Total Regional Population Boating or Swimming on a Trip
United States	222,846,268	35,876,397	21.0%	16.2%
New England	11,095,629	2,185,394	25.5%	19.8%
Middle Atlantic	31,005,526	4,501,586	19.5%	14.7%
East North Central	34,621,254	6,917,995	26.0%	20.1%
West North Central	15,024,360	3,401,579	28.3%	22.7%
South Atlantic	42,602,998	5,320,973	16.6%	12.6%
East South Central	13,597,436	1,857,285	19.4%	13.8%
West South Central	24,853,901	3,378,550	18.6%	13.7%
Mountain	15,030,720	2,327,945	19.2%	15.6%
Pacific	34,529,689	5,842,414	20.9%	17.0%
Alaska	484,754	142,675	33.8%	29.4%
Not Available	745,757	183,313	29.5%	24.6%
Less than 100,000	29,429,442	4,355,821	21.0%	14.9%
100,000 to 499,999	36,551,501	5,735,112	21.1%	15.8%
500,000 to 1,999,999	52,335,815	8,366,228	21.0%	16.1%
2,000,000 or more	103,783,753	17,235,923	21.0%	16.7%

Boaters and Swimmers are most likely to live in Minnesota, North Dakota, Alaska, Wisconsin and Vermont. They are least likely to live in Louisiana, Mississippi, Florida, Maryland and Arizona (see Fig. 3 on next page).

Fig. 3 Those Who Went Boating and Swimming While on Trips by U.S. State

Region	State	Population of State	Estimated Number of Boat/Swimmers	Percent of Pleasure Travelers in State	Percent of State Population
United States	All States	222,846,268	35,876,397	21.0%	16.2%
New England	Connecticut	2,685,692	478,020	23.2%	18.2%
	Maine	1,047,770	145,910	20.1%	13.9%
	Massachusetts	4,423,562	985,553	28.1%	22.4%
	New Hampshire	1,604,344	326,088	27.3%	20.3%
	Rhode Island	837,445	131,875	19.0%	15.7%
Vermont	Vermont	496,816	117,948	30.8%	23.7%
Middle Atlantic	New Jersey	6,708,501	924,402	17.8%	14.4%
	New York	14,727,054	2,300,838	20.9%	15.7%
	Pennsylvania	9,569,972	1,276,346	18.7%	13.3%
East North Central	Illinois	9,521,097	1,751,921	23.6%	18.5%
	Indiana	4,717,624	766,352	21.4%	16.5%
	Michigan	7,709,890	2,127,075	35.5%	27.9%
	Ohio	8,412,962	1,192,001	19.3%	14.3%
	Wisconsin	4,259,682	1,080,646	31.4%	25.4%
West North Central	Iowa	2,262,393	478,769	26.8%	21.3%
	Kansas	2,304,474	372,178	21.0%	16.2%
	Minnesota	3,946,220	1,212,896	36.0%	30.9%
	Missouri	4,138,758	808,008	25.2%	19.6%
	Nebraska	1,304,361	292,934	28.0%	22.5%
	North Dakota	488,140	144,571	35.2%	29.6%
	South Dakota	580,015	92,223	20.5%	15.9%
South Atlantic	Delaware	646,427	90,132	18.4%	13.9%
	District of Columbia	521,285	71,769	20.7%	13.8%
	Florida	13,937,467	1,523,282	14.2%	11.2%
	Georgia	6,668,302	910,721	17.9%	13.7%
	Maryland	3,428,206	420,053	15.8%	12.3%
	North Carolina	6,651,453	849,125	17.2%	12.8%
	South Carolina	3,241,944	437,256	18.5%	14.2%
	Virginia	5,957,159	839,820	18.3%	14.1%
West Virginia	1,550,755	178,814	20.6%	11.5%	
East South Central	Alabama	3,431,591	471,326	19.5%	13.7%
	Kentucky	3,447,277	570,118	23.4%	16.7%
	Mississippi	2,156,793	172,059	12.4%	8.0%
	Tennessee	4,561,775	643,783	19.4%	14.4%
West South Central	Arkansas	2,103,346	344,095	24.2%	16.4%
	Louisiana	3,367,908	270,798	12.0%	8.0%
	Oklahoma	2,643,565	529,763	28.1%	20.0%
	Texas	16,739,082	2,233,894	17.8%	13.5%
Mountain	Arizona	4,451,660	565,533	16.1%	12.8%
	Colorado	3,501,822	555,799	19.2%	16.0%
	Idaho	1,044,920	187,655	22.8%	18.0%
	Montana	726,027	121,265	20.2%	17.3%
	Nevada	1,809,582	253,217	17.5%	14.0%
	New Mexico	1,433,596	217,492	19.8%	15.2%
	Utah	1,671,322	357,015	25.5%	21.6%
Wyoming	Wyoming	391,790	69,968	21.0%	18.5%
Pacific	Alaska	484,754	142,675	33.8%	29.4%
	California	26,965,837	4,417,391	20.1%	16.4%
	Oregon	2,793,303	503,857	23.3%	18.0%
	Washington	4,770,549	921,166	24.1%	19.4%

Demographic Profile

Boaters and Swimmers are equally divided between males and females. They tend to be young or middle-aged adults (18 to 44 years of age) and are typically married. They are more likely than the average U.S. Pleasure Traveler to have dependent children (less than 18 years of age) living at home. Boaters and Swimmers are slightly more likely than average to have a university education (60.7%) and their household income is somewhat above-average (\$80,870).

Fig. 4 Demographic Profile of Boaters and Swimmers Relative to All U.S. Pleasure Travelers

		Boaters and Swimmers	Non-Boaters and Swimmers ¹	Pleasure Travelers	Index ²
Attribute	Size of Market	35,876,397	134,633,844	170,510,241	100
Gender	Male	50.8%	47.9%	48.5%	105
	Female	49.2%	52.1%	51.5%	96
Age of Respondent	18 to 24	14.4%	9.9%	10.8%	133
	25 to 34	24.0%	20.1%	21.0%	115
	35 to 44	20.7%	16.4%	17.3%	120
	45 to 54	22.0%	20.8%	21.0%	105
	55 to 64	11.9%	16.4%	15.5%	77
	65 Plus	6.9%	16.4%	14.4%	48
Average Age		41.2	46.6	45.4	N/A
Marital Status	Not married	28.6%	31.1%	30.5%	94
	Married	71.4%	68.9%	69.5%	103
Parental Status	No children under 18	61.7%	72.2%	70.0%	88
	Children under 18	38.3%	27.8%	30.0%	128
Education	High school or less	18.0%	21.2%	20.5%	88
	Trade, Technical, Community Col.	21.2%	21.4%	21.4%	99
	University Degree	42.9%	40.6%	41.1%	105
	Post Graduate Degree	17.8%	16.9%	17.1%	104
Household Income	Under \$20,000	6.5%	8.5%	8.1%	80
	\$20,000 to \$39,999	13.7%	16.9%	16.2%	84
	\$40,000 to \$59,999	16.2%	16.8%	16.7%	97
	\$60,000 to \$79,999	15.4%	14.5%	14.7%	105
	\$80,000 to \$99,999	12.4%	11.4%	11.6%	107
	\$100,000 to \$149,999	16.9%	13.7%	14.4%	118
	\$150,000 or more	8.3%	6.3%	6.7%	124
Not stated	10.7%	11.9%	11.7%	91	
Average Household Income		\$80,870	\$72,529	\$74,303	N/A

1 - "Non-Boaters and Swimmers" are defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years but did not participate in boating or swimming activities on any trip. The numbers of Boaters and Swimmers and Non-Boaters and Swimmers equal the number of Pleasure Travelers.

2 - The "Index" is calculated by dividing the percent for Boaters and Swimmers in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Boaters and Swimmers 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 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)

Boaters and Swimmers traveled more frequently over the past two years than the average U.S. Pleasure Traveler. They were more likely to have taken trips within their own state and to have visited Mexico, the Caribbean and overseas destinations.

Boaters and Swimmers were also more likely than the average U.S. Pleasure Traveler to have taken a trip to Canada in the past two years (19.6% versus 14.6%). They were especially likely to have taken trips to Ontario (12.4%), British Columbia (5.3%) and Quebec (4.5%); however, they were more likely than average to have visited all of the Canadian provinces or territories.

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

	Boaters and Swimmers	Non-Boaters and Swimmers	Pleasure Travelers	Index
Size of Market	35,876,397	134,633,844	170,510,241	100
All destinations	93.5%	83.2%	85.4%	109
Canada	19.6%	13.2%	14.6%	135
Newfoundland and Labrador	0.7%	0.3%	0.4%	165
Prince Edward Island	0.9%	0.5%	0.6%	141
New Brunswick	1.1%	0.7%	0.8%	131
Nova Scotia	1.6%	1.3%	1.3%	122
Quebec	4.5%	2.7%	3.1%	144
Ontario	12.4%	7.1%	8.3%	151
Manitoba	0.9%	0.4%	0.5%	170
Saskatchewan	0.7%	0.4%	0.5%	150
Alberta	1.5%	1.1%	1.2%	127
British Columbia	5.3%	3.8%	4.1%	129
Yukon	1.0%	0.5%	0.6%	168
Northwest Territories	0.5%	0.4%	0.4%	127
Nunavut	0.1%	LT 0.1%	LT 0.1%	130
Own State	89.6%	77.1%	79.7%	112
Other parts of the U.S.	92.7%	90.1%	90.6%	102
Mexico	18.2%	12.4%	13.6%	134
Caribbean	16.2%	11.8%	12.7%	127
All other destinations	11.4%	9.1%	9.6%	119

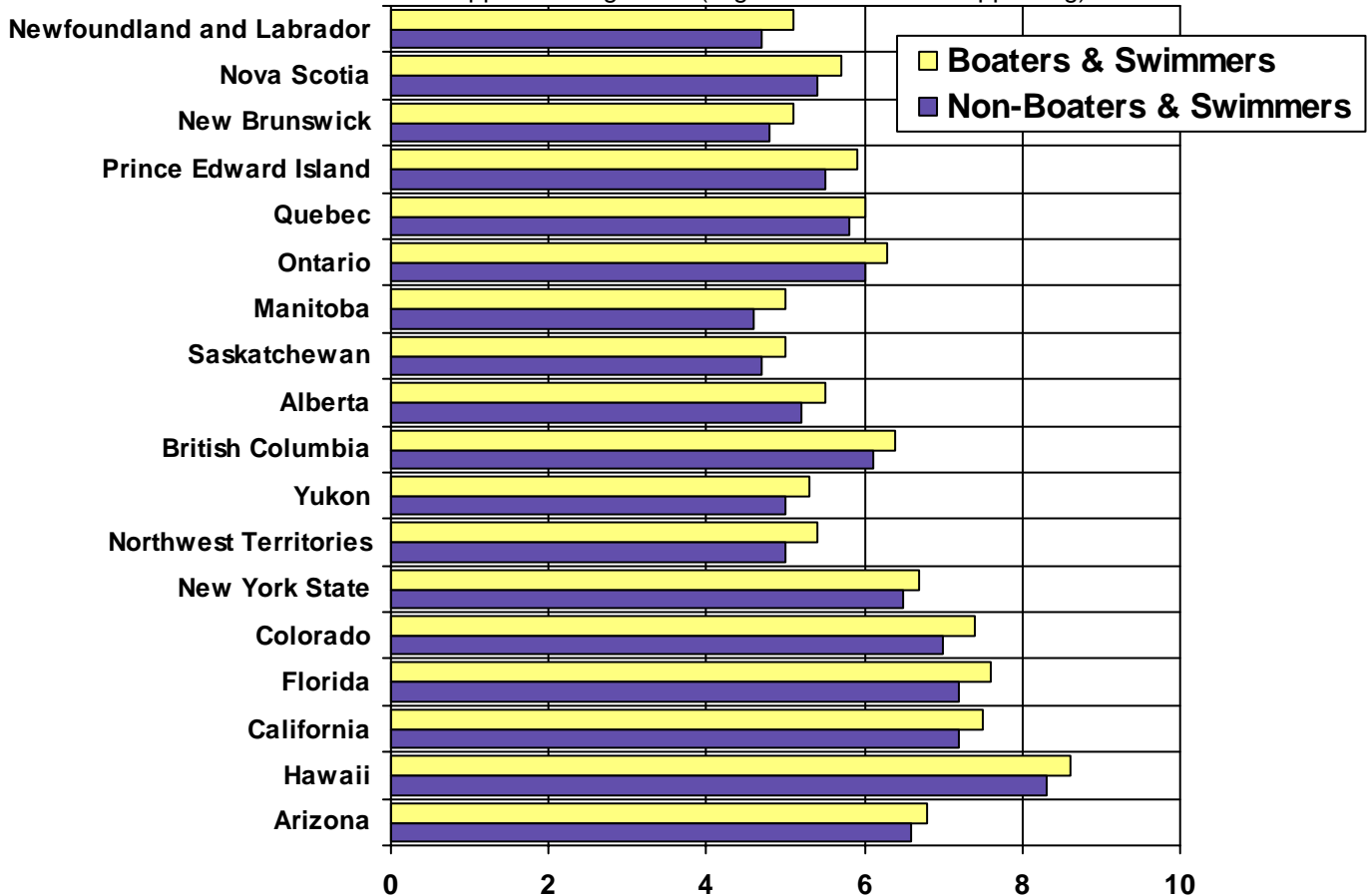
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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 Boaters and Swimmers were higher than the ratings of other U.S. Pleasure Travelers for all destinations. British Columbia (6.4) received the highest rating among the Canadian provinces and territories, followed by Ontario (6.3) and Quebec (6.0).

Overall, U.S. Pleasure Travelers rate the six reference U.S. states as more appealing than any of the Canadian provinces or territories. Hawaii (8.6) received the highest rating among Boaters and Swimmers.

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

Boaters and Swimmers were more likely than the average U.S. Pleasure Traveler to have participated in a full range of outdoor activities while on trips in the past two years. Most Boaters and Swimmers participated in ocean activities and in wildlife viewing while on trips. Relative to the average U.S. Pleasure Traveler, Boaters and Swimmers were more likely to have engaged in other water-based activities (e.g., hiking, climbing and paddling; sailing and surfing; scuba and snorkeling), sportsmen activities (e.g., fishing; hunting), winter activities (downhill skiing and snowboarding; snowmobiling and ATVing; cross-country skiing and snowshoeing), board and blade activities (e.g., ice skating), cycling, horseback riding and extreme sports (e.g., extreme air sports, extreme skiing).

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

	Boaters and Swimmers	Non-Boaters and Swimmers	Pleasure Travelers	Index
Size of Market	35,876,397	134,633,844	170,510,241	100
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	69.6%	31.6%	39.6%	176
Wildlife Viewing	53.9%	29.8%	34.9%	154
Hiking, Climbing and Paddling	45.2%	17.7%	23.5%	192
Fishing	41.9%	12.1%	18.4%	228
Games and Individual Sports (e.g., tennis, board games)	40.7%	17.3%	22.2%	183
Exercising and Jogging	25.3%	11.1%	14.1%	180
Golfing	17.5%	8.8%	10.7%	164
Downhill Skiing and Snowboarding	16.5%	5.8%	8.0%	206
Snowmobiling and ATVing	16.0%	4.8%	7.1%	224
Cycling	15.4%	3.9%	6.3%	244
Team Sports (e.g., football, baseball, basketball)	14.1%	6.2%	7.9%	179
Horseback Riding	13.2%	4.3%	6.2%	215
Sailing and Surfing (e.g., sailing, windsurfing, parasailing)	11.6%	2.9%	4.8%	244
Hunting	10.8%	4.0%	5.4%	200
Board and Blade (e.g., skateboarding, ice-skating)	10.4%	2.3%	4.0%	258
Scuba and Snorkelling	9.1%	2.7%	4.1%	225
Motorcycling	6.1%	2.3%	3.1%	198
Cross-country Skiing and Snowshoeing	5.0%	1.0%	1.9%	266
Extreme Air Sports (e.g., parachuting, bungee jumping)	3.9%	1.2%	1.7%	225
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	1.0%	0.2%	0.3%	301

Outdoor Activities Pursued While Not on Trips

The high level of outdoor activity displayed by Boaters and Swimmers while on trips is also apparent when they are NOT traveling. In addition to swimming, the majority of Boaters and Swimmers went on day outings to parks, exercised at home or at a fitness club, went picnicking, and gardened at home when not on trips. This segment was also much more likely than the average U.S. Pleasure Traveler to participate in other water-based activities (e.g., sailing or other boating; canoeing or kayaking) and winter activities (e.g., downhill skiing, ice skating, snowmobiling, cross-country skiing, snowboarding) when not on a trip.

Fig. 8 Outdoor Activities Pursued While NOT on Trips

	Boaters and Swimmers	Non-Boaters and Swimmers	Pleasure Travelers	Index
Size of Market	35,876,397	134,633,844	170,510,241	100
Swimming	77.0%	51.1%	56.5%	136
Day outing to a park	73.8%	60.3%	63.1%	117
Exercising at home or at a fitness club	61.5%	54.6%	56.0%	110
Picnicking	57.6%	45.1%	47.7%	121
Gardening	57.4%	51.9%	53.1%	108
Fishing	47.4%	28.9%	32.8%	145
Hiking	45.8%	28.9%	32.5%	141
Camping	45.0%	21.8%	26.7%	169
Sailing or other boating	39.7%	14.7%	20.0%	199
Cycling	34.9%	19.7%	22.9%	152
Jogging	26.5%	17.6%	19.5%	136
Hunting	24.7%	16.6%	18.3%	135
Playing team sports	22.9%	13.9%	15.8%	145
Playing racquet sports (e.g., tennis or badminton)	19.8%	11.4%	13.2%	150
Riding an all-terrain vehicle (ATV)	18.7%	9.6%	11.5%	163
Hunting	17.5%	10.2%	11.8%	149
Canoeing or kayaking	16.0%	5.7%	7.8%	204
Horseback riding	13.5%	7.3%	8.6%	157
Rollerblading	12.5%	5.9%	7.3%	171
Downhill skiing	10.6%	4.4%	5.7%	186
Ice-skating	9.2%	4.5%	5.5%	168
Snowmobiling	6.3%	2.5%	3.3%	190
Cross-country skiing	5.2%	1.8%	2.5%	206
Snowboarding	4.9%	2.1%	2.7%	183
Skateboarding	4.1%	1.7%	2.2%	188

Culture and Entertainment Activities Pursued While on Trips

The majority of Boaters and Swimmers went shopping and dining, attended festivals and fairs and visited theme parks and exhibits, historical sites, museums and art galleries and casinos, theatre and comedy clubs when on trips. Relative to the average U.S. Pleasure Traveler, Boaters and Swimmers were especially more likely to go to rock concerts and recreational dancing, to participate in agro-tourism activities and participatory historical activities, to attend sporting events (e.g., amateur tournaments, national and international sporting events) and to attend theatre, film and music festivals.

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

	Boaters and Swimmers	Non-Boaters and Swimmers	Pleasure Travelers	Index
Size of Market	35,876,397	134,633,844	170,510,241	100
Shopping and Dining	86.6%	75.3%	77.7%	111
Theme Parks and Exhibits	65.3%	44.6%	49.0%	133
Historical Sites, Museums and Art Galleries	64.8%	50.4%	53.5%	121
Fairs and Festivals	61.5%	35.5%	41.0%	150
Casino, Theatre and Comedy Clubs	55.9%	42.6%	45.4%	123
Fine Dining and Spas	43.0%	30.3%	33.0%	130
Science and Technology Exhibits	36.5%	21.7%	24.8%	147
Wine, Beer and Food Tastings	32.8%	20.3%	22.9%	143
Rock Concerts and Recreational Dancing	26.4%	12.3%	15.3%	173
Equestrian and Western Events	26.1%	12.6%	15.5%	169
Professional Sporting Events	24.5%	13.9%	16.1%	152
Agro-Tourism	23.9%	10.8%	13.5%	177
Garden Theme Attractions	20.6%	11.8%	13.7%	151
High Art Performances	17.1%	9.3%	10.9%	156
Theatre, Film and Musical Festivals	14.7%	6.6%	8.3%	177
Aboriginal Cultural Experiences	14.2%	7.1%	8.6%	165
Amateur Tournaments	13.4%	6.1%	7.7%	175
Archaeological Digs and Sites	8.5%	4.7%	5.5%	155
Participatory Historical Activities	7.0%	3.1%	3.9%	178
National and International Sporting Events	3.6%	1.4%	1.9%	195

Culture and Entertainment Activities Pursued While Not on Trips

While NOT traveling, most Boaters and Swimmers went to restaurants, visited festivals or fairs and zoos or aquariums, and attended amateur sporting events. In addition, Boaters and Swimmers were more likely than the average U.S. Pleasure Traveler to participate in music-oriented entertainment activities while not on trips (e.g., bars with live pop or rock music, rock concerts, dancing).

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

	Boaters and Swimmers	Non-Boaters and Swimmers	Pleasure Travelers	Index
Size of Market	35,876,397	134,633,844	170,510,241	100
Going out to eat in restaurants	94.7%	92.3%	92.8%	102
Going to festivals or fairs	72.0%	63.7%	65.5%	110
Going to zoos or aquariums	52.8%	43.7%	45.6%	116
Going to amateur sporting events	50.1%	37.2%	39.9%	126
Going to amusement or theme parks	45.2%	36.2%	38.1%	119
Going to historic sites or heritage buildings	43.3%	39.3%	40.1%	108
Going to professional sporting events	42.7%	32.8%	34.9%	122
Going to museums	41.1%	36.5%	37.5%	110
Going to pick-your-own farms or farmers' market	37.3%	30.1%	31.6%	118
Going to bars with live pop or rock bands	33.2%	21.0%	23.6%	141
Going to live theatre	31.1%	28.7%	29.2%	107
Going to art galleries or art shows	30.3%	27.1%	27.8%	109
Going to gamble in casinos	29.7%	27.5%	28.0%	106
Going to rock music concerts	29.5%	19.1%	21.3%	138
Going dancing	26.9%	19.2%	20.8%	129
Going to botanical gardens	21.8%	19.5%	20.0%	109
Going to classical music concerts	16.0%	14.6%	14.9%	108
Staying overnight in a hotel or B&B in own city	13.8%	9.7%	10.6%	130
Going to day spas	13.2%	9.5%	10.3%	129
Going to rodeos	11.0%	7.5%	8.2%	134
Going to jazz clubs	10.1%	7.3%	7.9%	128
Going to the ballet	8.0%	6.8%	7.0%	114
Going to the opera	6.1%	5.6%	5.7%	106

Accommodations Stayed In While on Trips

Boaters and Swimmers were most likely to stay at a public campground while on a trip in the past two years. They were also much more likely than the average U.S. Pleasure Traveler to have stayed in accommodations on, or adjacent to, bodies of freshwater (e.g. houseboats, lakeside or riverside resorts). Accommodations in wilderness settings were also more attractive to Boaters and Swimmers than to the average U.S. Pleasure Traveler (e.g., campsite in a wilderness setting, wilderness lodge accessible by car, remote or fly-in wilderness lodge or outpost).

Fig. 11 Accommodations Stayed In While on Trips

	Boaters and Swimmers	Non-Boaters and Swimmers	Pleasure Travelers	Index
Size of Market	35,876,397	134,633,844	170,510,241	100
A Public Campground in a National, State, Provincial or Municipal Park	46.1%	29.5%	34.8%	132
Lakeside / Riverside Resort	36.5%	20.4%	25.6%	143
Seaside Resort	35.5%	38.8%	37.7%	94
A Private Campground	28.3%	17.4%	20.9%	135
Ski Resort or Mountain Resort	21.4%	17.0%	18.4%	116
A Camp Site in a Wilderness Setting (Not a Campground)	14.4%	7.3%	9.6%	150
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	10.6%	7.8%	8.7%	122
Wilderness Lodge You Can Drive to by Car	8.8%	6.4%	7.2%	122
Health Spa	7.2%	6.1%	6.5%	112
On a Houseboat	5.8%	1.6%	2.9%	197
Farm or Guest Ranch	5.1%	3.6%	4.1%	124
Country Inn or Resort with Gourmet Restaurant	4.8%	3.7%	4.1%	117
Remote or Fly-In Wilderness Lodge	2.3%	1.4%	1.7%	134
Cooking School	1.6%	1.0%	1.2%	138
Remote or Fly-In Wilderness Outpost	1.5%	0.7%	0.9%	160
Wine Tasting School	1.1%	0.8%	0.9%	120

Tours and Cruises Taken During Past Two Years

Boaters and Swimmers were most likely to have taken sameday tours (e.g., self-guided and guided tours, city tours, scenic countryside drives) while on trips in the past two years. Relative to the average U.S. Pleasure Traveler, Boaters and Swimmers were much more likely to have taken cruises on lakes and rivers (e.g., a sightseeing cruise, a Great Lakes cruise, a submarine cruise, a St. Lawrence River cruise). They were also more likely than average to have taken a wilderness tour, a winery tour, and an air tour as a passenger or pilot.

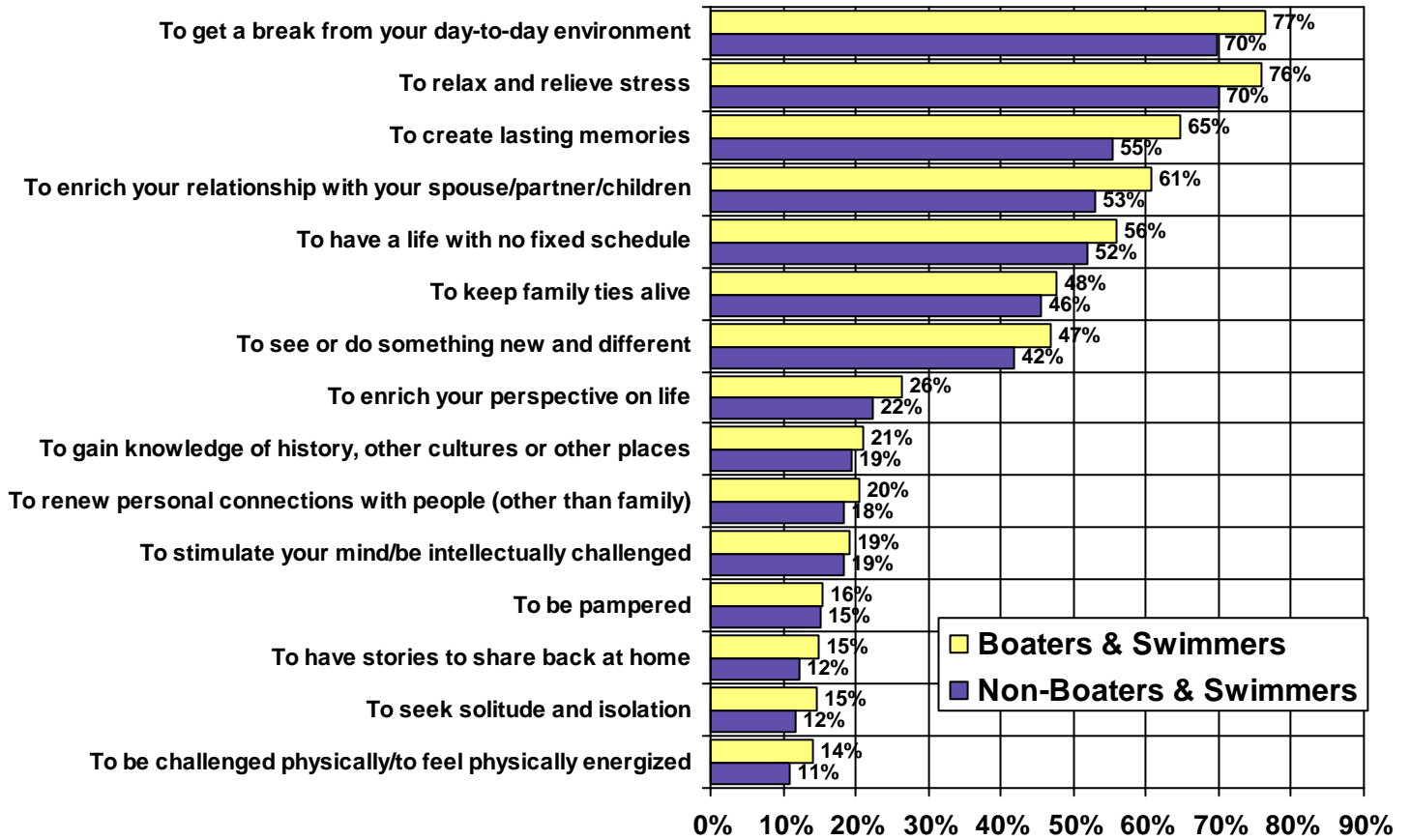
Fig. 12 Tours and Cruises Taken During Past Two Years

	Boaters and Swimmers	Non-Boaters and Swimmers	Pleasure Travelers	Index
Size of Market	35,876,397	134,633,844	170,510,241	100
A self-guided sameday tour while on an overnight trip	26.5%	17.2%	19.2%	138
An organized sameday guided tour while on an overnight trip	21.8%	17.7%	18.5%	117
Around the city	20.2%	14.6%	15.8%	128
Around the country side - scenic drives	18.3%	11.7%	13.1%	140
A self-guided overnight tour where you stayed in different locations	14.7%	9.2%	10.4%	141
On the water (sightseeing cruise)	12.5%	6.5%	7.8%	161
Wilderness tour	11.9%	6.2%	7.4%	160
Some other type of tour	10.8%	8.3%	8.8%	123
Caribbean ocean cruise	10.6%	8.6%	9.0%	118
An organized overnight guided tour where you stayed in different locations	9.4%	7.5%	7.9%	120
An organized overnight guided tour where you stayed in a single location	8.6%	6.2%	6.7%	128
To a casino	7.3%	4.3%	4.9%	149
To a winery	6.0%	2.9%	3.6%	167
Ocean cruise - Other	5.7%	4.6%	4.8%	119
Cruise on another lake or river	3.3%	1.6%	2.0%	168
To a factory	2.8%	1.5%	1.8%	156
Alaskan ocean cruise	2.6%	2.5%	2.5%	104
Some other type of cruise	2.5%	1.5%	1.7%	146
In the air as a pilot or passenger of an airplane or helicopter	2.3%	1.2%	1.4%	162
Great Lakes cruise	0.9%	0.3%	0.4%	220
Submarine cruise	0.5%	0.2%	0.2%	195
Cruise on the St. Lawrence River	0.4%	0.3%	0.3%	126

Benefits Sought While on Vacation

Most Boaters and Swimmers take a vacation to get a break from their day-to-day environment, relax and relieve stress, create lasting memories, enrich family relationships, and live without a fixed schedule. Boaters and Swimmers especially value vacations that create lasting memories and enrich family relationships. They are more likely than others to seek new and different things to see and do when on vacation.

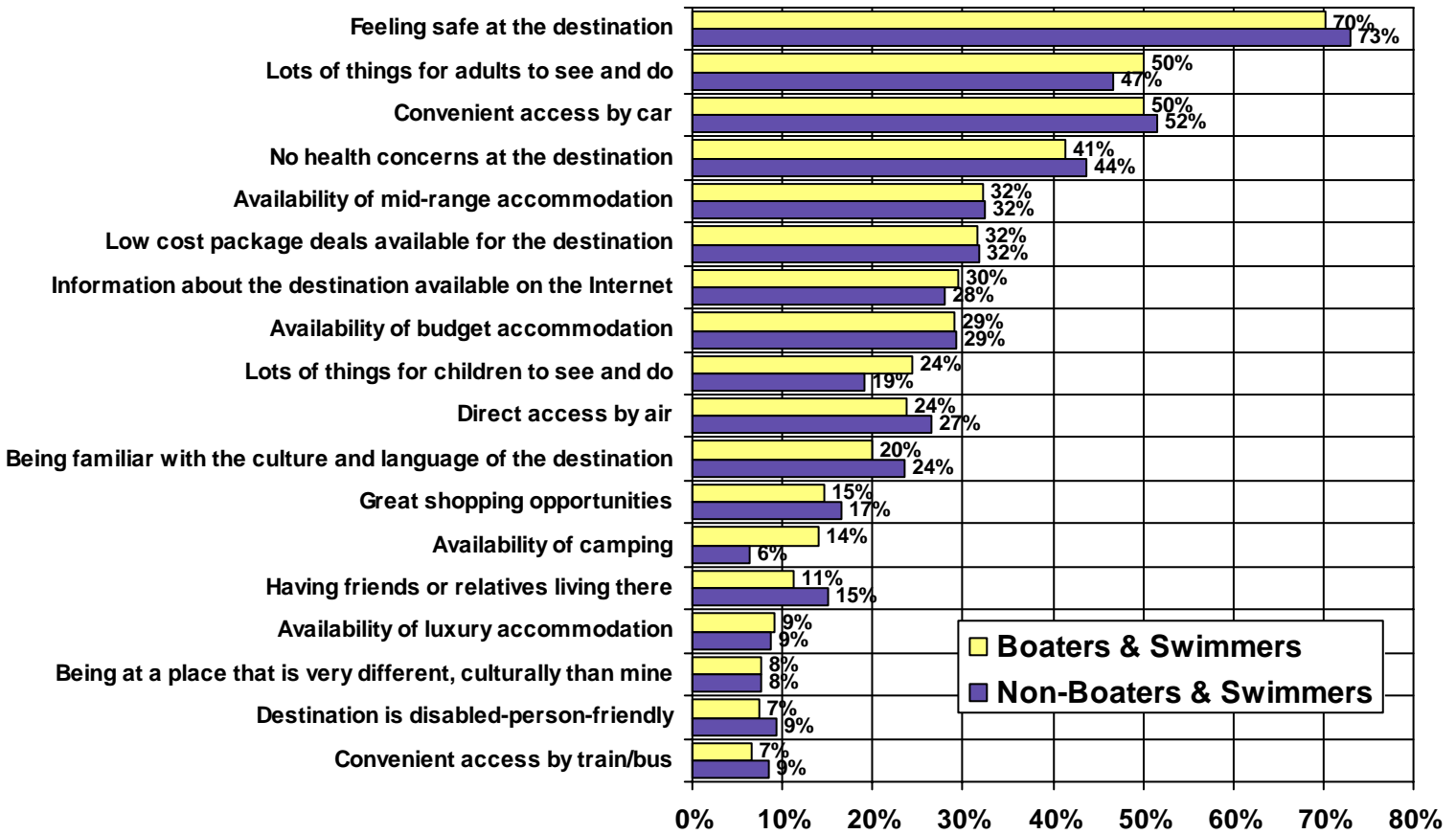
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

The majority of Boaters and Swimmers consider it important to feel safe while on vacation, to have lots of things to see and do and to have convenient access by car. Relative to the average U.S. Pleasure Traveler, Boaters and Swimmers are more likely to consider it important that a destination offers lots for both adults and children to see and do. They are also more likely to rate the availability of camping as a highly important attribute of a destination.

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



How Destinations Are Selected

Respondents were asked a series of questions concerning how they select destinations. Most Boaters and Swimmers begin planning their vacation with a particular destination in mind. For winter vacations, they are more likely than the average U.S. Pleasure Traveler to begin their vacation planning by considering what activities they like to do.

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

	Boaters and Swimmers	Non-Boaters and Swimmers	Pleasure Travelers	Index
Size of Market	35,876,397	134,633,844	170,510,241	100
Summer				
Started with a desired destination in mind	57.1%	58.6%	58.2%	98
Started by considering specific activities wanted to do	10.9%	9.6%	9.9%	110
Started with a certain type of vacation experience in mind	19.5%	16.6%	17.3%	113
Looked for packaged deals - no destination in mind	1.2%	1.1%	1.1%	105
Considered something else first	3.6%	4.9%	4.6%	78
Don't know / Other	7.7%	9.2%	8.9%	87
Winter				
Started with a desired destination in mind	58.2%	59.2%	58.9%	99
Started by considering specific activities wanted to do	15.2%	10.0%	11.3%	135
Started with a certain type of vacation experience in mind	15.1%	14.7%	14.8%	102
Looked for packaged deals - no destination in mind	1.3%	1.5%	1.4%	89
Considered something else first	3.9%	5.8%	5.3%	72
Don't know / Other	6.3%	8.9%	8.3%	77

Trip Planning and Information Sources Consulted

Similar to the average U.S. Pleasure Traveler, most Boaters and Swimmers (57.2%) participate in the planning of their vacations. The majority in this activity segment rely on Internet websites, past experience and word-of-mouth for travel information. However, relative to the average U.S. Pleasure Traveler, Boaters and Swimmers are more likely to obtain information from official tourism sources (e.g. official travel guides or brochures, visitor information centres), newspaper or magazine articles and advertising, television programs and advertising, and trade, travel and sports shows.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Boaters and Swimmers	Non-Boaters and Swimmers	Pleasure Travelers	Index
Size of Market		35,876,397	134,633,844	170,510,241	100
Who Plans Trips?	Respondent plans trips	39.1%	39.2%	39.2%	100
	Trip planning a shared responsibility	18.1%	17.5%	17.6%	103
	Someone else plans trips	42.8%	43.3%	43.2%	99
Information Sources Consulted	An Internet website	81.8%	74.3%	76.0%	108
	Past experience / Been there before	61.4%	52.5%	54.5%	113
	Advice of others / Word-of-mouth	55.7%	42.4%	45.4%	123
	Maps	38.1%	31.1%	32.7%	117
	Official travel guides or brochures from state / province	27.0%	18.8%	20.6%	131
	Visitor information centres	26.8%	18.6%	20.4%	132
	An auto club such as AAA	26.2%	23.4%	24.0%	109
	Articles in newspapers / magazines	23.7%	16.6%	18.1%	131
	A travel agent	21.2%	17.9%	18.6%	114
	Travel information received in the mail	19.0%	14.9%	15.8%	120
	Travel guide books such as Fodor's	15.1%	11.1%	12.0%	126
	Advertisements in newspapers / magazines	14.2%	9.9%	10.9%	130
	Programs on television	10.0%	6.3%	7.1%	140
	An electronic newsletter or magazine received by e-mail	8.0%	5.5%	6.0%	133
	Advertisements on television	5.4%	3.6%	4.0%	135
Visits to trade, travel or sports shows	4.1%	2.0%	2.4%	170	

Use of the Internet to Plan and Arrange Trips

Boaters and Swimmers are more likely than the average U.S. Pleasure Traveler to use the Internet for planning a trip (76.6%) and to book trip components online (54.8%). The majority of Boaters and Swimmers use travel planning / booking websites (e.g., Expedia), and hotel or resort websites. Boaters and Swimmers most often book accommodations and airline tickets over the Internet.

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

		Boaters and Swimmers	Non-Boaters and Swimmers	Pleasure Travelers	Index
Size of Market		35,876,397	134,633,844	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	23.4%	33.0%	31.0%	76
	Uses Internet to plan trips only	21.8%	19.7%	20.1%	108
	Uses Internet to book part of trip	54.8%	47.4%	48.9%	112
Types of Websites Consulted	A travel planning / booking website	60.0%	54.3%	55.6%	108
	A website of a hotel or resort	56.4%	52.3%	53.3%	106
	An airline's website	48.3%	44.7%	45.6%	106
	A tourism website of a country / region / city	41.6%	33.1%	35.1%	118
	A website of an attraction	39.6%	31.4%	33.4%	119
	Some other website	28.7%	23.9%	25.1%	115
	A cruise line website	13.1%	12.2%	12.4%	105
	A motorcoach website	1.8%	1.2%	1.3%	135
Parts of Trips Booked Over The Internet	Accommodations	75.2%	70.8%	71.9%	105
	Air tickets	72.6%	69.9%	70.6%	103
	Car rental	41.5%	36.9%	38.0%	109
	Tickets or fees for specific activities or attractions	31.7%	24.7%	26.3%	120
	A package containing two or more items	22.1%	16.4%	17.8%	124
	Tickets for rail, bus or boat / ship fares	14.7%	11.0%	11.9%	124
	Other	3.8%	2.7%	2.9%	131

Media Consumption Habits

Boaters and Swimmers are comparable to the average U.S. Pleasure Traveler in terms of their newspaper reading habits and television viewing preferences. Boaters and Swimmers can be targeted most effectively through magazines and websites that focus on their specific interest in outdoor activities. This segment is also more likely than the average U.S. Pleasure Traveler to read magazines on photography and video, travel, family and parenting, and city living. Boaters and Swimmers are also more likely than average to listen to radio stations with rock and pop music formats (e.g., modern or alternative rock, Top 40 or current hits).

Fig. 18 Media Consumption Habits

		Boaters and Swimmers	Non-Boaters and Swimmers	Pleasure Travelers	Index
Size of Market		35,876,397	134,633,844	170,510,241	100
Newspaper Readership	Reads daily newspaper	58.1%	60.4%	59.9%	97
	Reads weekend edition of newspaper	56.3%	55.3%	55.5%	101
	Reads local neighbourhood or community newspapers	51.7%	49.0%	49.5%	104
	Reads other types of newspapers	14.7%	13.6%	13.9%	106
	Frequently or occasionally reads travel section of daily newspaper	45.1%	42.4%	43.0%	105
	Frequently or occasionally reads travel section of weekend newspaper	52.3%	48.5%	49.3%	106
Types of Magazines Read (Top 5 Indexed)	Outdoor activities/sports	16.7%	9.1%	10.7%	156
	Photography and video	5.1%	3.6%	3.9%	131
	Travel (e.g., Condé Nast)	13.7%	9.8%	10.6%	129
	Family and parenting	15.4%	11.4%	12.3%	126
	Magazines about your city	8.6%	6.5%	6.9%	125
Type of Television Programs Watched (Top 5 Indexed)	Music / Music video shows / channels	33.3%	26.7%	28.1%	119
	Late night talk shows	30.3%	26.2%	27.1%	112
	Travel shows	32.3%	28.0%	28.9%	112
	Situation comedies (e.g., Friends)	56.9%	50.0%	51.5%	111
	Reality shows (e.g., American Idol)	43.7%	38.4%	39.5%	110
Type of Radio Programs Listened To (Top 5 Indexed)	Modern rock / Alternative rock	43.6%	30.0%	32.9%	133
	Top 40 / Current hits	32.6%	24.3%	26.1%	125
	All sports	14.3%	11.3%	11.9%	120
	Country music	37.5%	31.1%	32.4%	116
	Multicultural	5.5%	4.5%	4.7%	115
Types of Websites Visited (Top 5 Indexed)	Sites for specific activities or interests	40.5%	30.2%	32.5%	125
	Magazine sites	17.4%	14.0%	14.8%	118
	Travel	54.3%	46.1%	48.0%	113
	Sports	33.4%	29.0%	30.0%	111
	House and home	31.8%	27.8%	28.7%	111

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 and Other Marine Life	Visited National, Provincial /State Park
	Wildflowers /Flora Viewing	Viewing Northern Lights
Hiking, Climbing and 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 and 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 and Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Scuba and Snorkelling	Scuba Diving in Lakes /Rivers	Scuba Diving in Sea /Ocean
	Snorkelling in Lakes /Rivers	
Exercising and 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 and 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 and Snowboarding	Snowboarding	Downhill Skiing
Cross-country Skiing and Snowshoeing	Cross-country Skiing	Snowshoeing
Extreme Skiing	Heli-Skiing	Cross Country or Back Country as an Overnight Touring Trip
	Ski Jouring	
Hockey, Skating, Rollerblading and 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 and 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 and 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 and 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 and 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 and Events (e.g., Powwows)	Aboriginal Outdoor Adventure and /or Sports
Fairs and 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 and Technology Exhibits	Science or Technology Museums	Children's Museums
	Science and Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
Theme Parks and 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 and 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 and 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 and 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 and Dancing	Rock and Roll / Popular Music Concert	Recreational Dancing
Archaeological Digs and Sites	Archaeological Digs	Paleontological / Archaeological Sites
Equestrian and Western Events	Equine (Horse) Competitions	Country / Western Music Concerts
	Western Theme Events (e.g., Rodeos)	Auto Races
	Horse Races	
Fine Dining and 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