

**U.S. TRAVEL MARKET**

**Cycling While on Trips  
Of One or More Nights**

*A Profile Report*

**March 23, 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





### Travel Activity and Motivation Survey (TAMS)

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

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

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

TAMS was sponsored by the following organizations:

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

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

The 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 persons who went bicycling while on an overnight trip and compares them with other U.S. Pleasure Travelers (i.e., those who took at least one pleasure trip or vacation in the last two years). This report is part of a series of 43 Activity Reports prepared using the U.S. TAMS database.

## Cycling While on Trips

### Market Incidence

Over the last two years, 4.9% (10,787,235) of adult Americans went cycling while on an out-of-town trip of one or more nights. 3.8% reported going recreational cycling or taking a same day excursion by bicycle; while 1.5% went mountain biking and 0.4% went on an overnight touring trip by bicycle. Only 0.1% participated in all three cycling activities while on trips in the past two years.

Of those who cycled, 27.4% reported that cycling was the main reason for taking at least one trip in the past two years. 60.0% of those who went on an overnight cycling touring trip reported that this activity was the main reason for taking a trip compared to 31.3% of those who mountain biked and 22.5% of those who went recreational cycling.

Fig. 1 Incidence of Cycling While on Trips<sup>1</sup>

Size of Market	Number of Cyclists <sup>2</sup>	Percent Main Reason for Trip <sup>3</sup>	Percent of Pleasure Travelers <sup>4</sup>	Percent of Total U.S. Population <sup>5</sup>
Cycling (All Activities)	10,787,235	27.4%	6.3%	4.9%
Recreational cycling, Same day excursion	8,382,597	22.5%	4.9%	3.8%
Mountain biking	3,397,384	31.3%	2.0%	1.5%
Overnight touring trip	958,583	60.0%	0.6%	0.4%
Participated in all three cycling activities	219,777	21.6%	0.1%	0.1%

- 1- "Trips" are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.
- 2- "Cyclists" are defined as individuals who bicycled while on an out-of-town trip of one or more nights during the past two years and who took at least one out-of-town pleasure trip of one or more nights during the past two years. This column reports the number of individuals who participated in the activity on at least one trip during the last two years.
- 3- This column reports the percent who participated in each activity who stated that the activity was the main reason for taking at least one trip during the past two years.
- 4- "Pleasure Travelers" are defined as individuals who have taken at least one out-of-town pleasure trip of one or more nights in the last two years. This column reports the percent of Pleasure Travelers who participated in each activity on at least one trip during the last two years.
- 5- This column reports the percent of the Total U.S. Adult Market who participated in each activity on a trip during the past two years.

### Incidence by Region, State and Population Size

Cyclists are over-represented relative to the average U.S. Pleasure Traveler on the east and west coasts of the United States (e.g., Pacific, New England, Middle Atlantic), as well as in the East North Central and Mountain regions. They also tend to reside in the larger cities (2 million or more in population).

Fig. 2 Geographic Distribution and Population Size of Those Who Cycle While on Trips

	Total Population	Estimated Number Who Cycled on a Trip	Percent of Pleasure Travelers in Region Who Cycled on a Trip	Percent of Total Regional Population Who Cycled on a Trip
United States	222,846,268	10,787,235	6.3%	4.9%
New England	11,095,629	665,016	7.8%	6.0%
Middle Atlantic	31,005,526	1,609,851	7.0%	5.3%
East North Central	34,621,254	1,821,463	6.8%	5.3%
West North Central	15,024,360	698,296	5.8%	4.7%
South Atlantic	42,602,998	1,703,227	5.3%	4.0%
East South Central	13,597,436	407,435	4.3%	3.0%
West South Central	24,853,901	605,740	3.3%	2.6%
Mountain	15,030,720	861,041	7.1%	5.8%
Pacific	34,529,689	2,349,183	8.4%	6.8%
Alaska	484,754	65,983	15.6%	13.6%
Not Available	745,757	70,282	11.3%	9.4%
Less than 100,000	29,429,442	943,967	4.5%	3.2%
100,000 to 499,999	36,551,501	1,651,367	6.1%	4.5%
500,000 to 1,999,999	52,335,815	2,096,675	5.3%	4.1%
2,000,000 or more	103,783,753	6,024,943	7.3%	5.9%

Those who cycle while on trips are especially likely to be from Alaska, District of Columbia, Colorado, Oregon, Pennsylvania and New Hampshire. They are least often from Arkansas, Louisiana, West Virginia, Oklahoma and Kansas (see Fig. 3 on next page).



## Demographic Profile

Cyclists tend to be male, 35 to 54 years old and married with children under 18 living at home. Cyclists also are much more affluent than the average U.S. Traveler with higher household incomes and university education. In fact, 26% of Cyclists report having a post-graduate degree.

Fig. 4 Demographic Profile of Cyclists Relative to All U.S. Pleasure Travelers

Attribute	Size of Market	Cyclists	Non-Cyclists <sup>1</sup>	Pleasure Travelers	Index <sup>2</sup>
		10,787,235	159,723,006	170,510,241	100
Gender	Male	57.7%	47.9%	48.5%	119
	Female	42.3%	52.1%	51.5%	82
Age of Respondent	18 to 24	11.8%	10.8%	10.8%	109
	25 to 34	23.3%	20.8%	21.0%	111
	35 to 44	21.1%	17.0%	17.3%	122
	45 to 54	25.0%	20.8%	21.0%	119
	55 to 64	13.2%	15.6%	15.5%	85
	65 Plus	5.6%	15.0%	14.4%	39
Average Age		41.8	45.7	45.4	N/A
Marital Status	Not married	28.4%	30.7%	30.5%	93
	Married	71.6%	69.3%	69.5%	103
Parental Status	No children under 18	66.0%	70.3%	70.0%	94
	Children under 18	34.0%	29.7%	30.0%	113
Education	High school or less	10.7%	21.2%	20.5%	52
	Trade, Technical, Community Col.	17.1%	21.7%	21.4%	80
	University Degree	46.2%	40.7%	41.1%	112
	Post Graduate Degree	26.0%	16.5%	17.1%	152
Household Income	Under \$20,000	5.1%	8.3%	8.1%	63
	\$20,000 to \$39,999	10.1%	16.6%	16.2%	62
	\$40,000 to \$59,999	14.2%	16.9%	16.7%	85
	\$60,000 to \$79,999	15.0%	14.7%	14.7%	102
	\$80,000 to \$99,999	13.8%	11.4%	11.6%	119
	\$100,000 to \$149,999	18.6%	14.1%	14.4%	130
	\$150,000 or more	12.8%	6.3%	6.7%	191
	Not stated	10.4%	11.8%	11.7%	89
Average Household Income		\$91,281	\$73,139	\$74,303	N/A

- 1- "Non-Cyclists" 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 go cycling on any trip. The number of Cyclists and Non-Cyclists equals the number of Pleasure Travelers.
- 2- The "Index" is calculated by dividing the percent for Cyclists in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which cyclists 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)

Cyclists are frequent travelers and more likely than the average U.S. Pleasure Traveler to have taken a trip during the past two years. Almost all Cyclists have traveled in their own state and to other parts of the United States in the past two years. They are more likely to have visited Mexican, Caribbean and overseas destinations.

Cyclists also are much more likely than the average U.S. Pleasure Traveler to have taken a trip to Canada in the past two years (26.1% versus 14.6%). They are especially likely to have taken trips to Ontario (14.3%), British Columbia (9.1%) and Quebec (6.5%). In fact, they are considerably more likely than the average U.S. Pleasure Traveler to have visited all of the Canadian provinces or territories (except Nunavut).

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

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market	10,787,235	159,723,006	170,510,241	100
All destinations	94.4%	84.8%	85.4%	111
Canada	26.1%	13.8%	14.6%	179
Newfoundland and Labrador	0.8%	0.4%	0.4%	196
Prince Edward Island	1.2%	0.6%	0.6%	197
New Brunswick	1.4%	0.8%	0.8%	168
Nova Scotia	2.2%	1.3%	1.3%	163
Quebec	6.5%	2.9%	3.1%	210
Ontario	14.3%	7.9%	8.3%	173
Manitoba	0.7%	0.5%	0.5%	126
Saskatchewan	0.7%	0.5%	0.5%	151
Alberta	2.6%	1.1%	1.2%	215
British Columbia	9.1%	3.8%	4.1%	220
Yukon	1.4%	0.5%	0.6%	253
Northwest Territories	0.8%	0.4%	0.4%	205
Nunavut	0.0%	0.0%	0.0%	88
Own State	90.5%	79.0%	79.7%	114
Other parts of United States	95.5%	90.3%	90.6%	105
Mexico	22.1%	13.0%	13.6%	163
Caribbean	18.9%	12.3%	12.7%	149
All other destinations	15.8%	9.1%	9.6%	166

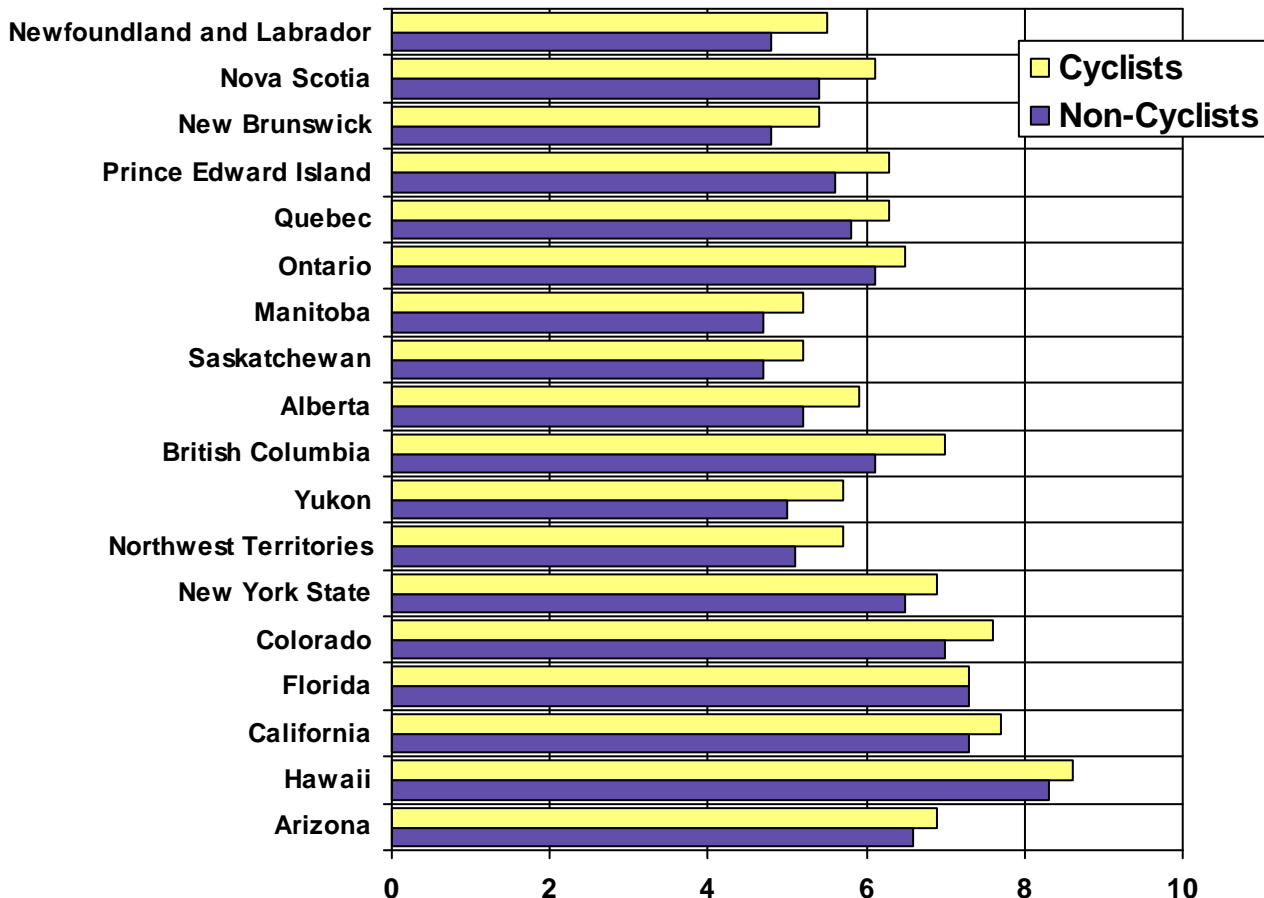
**Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories**

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 Cyclists are higher than those of Non-Cyclists regardless of the destination. Cyclists rate British Columbia as the most appealing province (7.0) followed by Ontario, Prince Edward Island, Quebec and Nova Scotia. Manitoba and Saskatchewan receive the lowest ratings on the appeal measure.

Cyclists give Hawaii the highest appeal rating overall (8.6). Among the other U.S. reference states, Cyclists also give high ratings to California, Colorado and Florida. Cyclists regard British Columbia as having a similar level of appeal to both Arizona and New York State.

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

Cyclists are active in a full range of outdoor activities while on trips. The majority of Cyclists have participated in ocean activities, hiking, climbing and paddling, wildlife viewing, and boating and swimming on at least one trip in the past two years. Relative to the average U.S. Pleasure Traveler, Cyclists are much more likely to engage in strenuous physical activities, including both winter (extreme skiing, cross-country skiing and snowshoeing, downhill skiing and snowboarding, ice-skating) and summer activities (rollerblading and skateboarding, extreme air sports, scuba and snorkelling). Cyclists are more active than average U.S. Pleasure Travelers in both competitive activities (e.g., games & individual sports, team sports, golfing) and non-competitive activities (e.g., fitness & jogging, sailing and surfing, horseback riding, motorcycling).

In part these patterns reflect the fact that this segment is predominately young, male and affluent, all of which are 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)

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
<b>Size of Market</b>	<b>10,787,235</b>	<b>159,723,006</b>	<b>170,510,241</b>	<b>100</b>
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	71.9%	37.4%	39.6%	182
Hiking, Climbing & Paddling	64.7%	20.7%	23.5%	276
Wildlife Viewing	63.2%	33.0%	34.9%	181
Boating & Swimming (e.g., motorboating, swimming in lakes)	51.3%	19.0%	21.0%	244
Games & Individual Sports (e.g., tennis, board games)	48.0%	20.5%	22.2%	216
Exercising and Jogging	43.8%	12.1%	14.1%	311
Fishing	33.6%	17.4%	18.4%	183
Downhill Skiing & Snowboarding	24.9%	6.9%	8.0%	310
Golfing	22.3%	9.9%	10.7%	209
Team Sports (e.g., football, baseball, basketball)	19.5%	7.1%	7.9%	247
Snowmobiling & ATVing	17.4%	6.4%	7.1%	243
Horseback Riding	16.9%	5.4%	6.2%	275
Board and Blade (e.g., skateboarding, ice-skating)	16.6%	3.2%	4.0%	412
Sailing and Surfing (e.g., sailing, windsurfing, parasailing)	16.4%	4.0%	4.8%	345
Scuba & Snorkelling	11.9%	3.5%	4.1%	292
Cross-country Skiing & Snowshoeing	10.3%	1.3%	1.9%	548
Hunting	8.6%	5.2%	5.4%	160
Motorcycling	8.0%	2.7%	3.1%	262
Extreme Air Sports (e.g., parachuting, bungee jumping)	6.7%	1.4%	1.7%	389
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	1.8%	0.2%	0.3%	552

### Outdoor Activities Pursued While Not On a Trip

The comparatively high level of activity among Cyclists while on trips is also apparent when they are NOT traveling. Thus, in addition to being very likely to go cycling, they also frequently go on day outings to parks, go swimming, exercise at home or at a fitness club, go hiking, garden at home and go picnicking. Relative to the average U.S. Pleasure Traveler, Cyclists are much more likely to participate in cross-country and downhill skiing, canoeing and kayaking, snowboarding, skateboarding, rollerblading and racquet sports.

Fig. 8 Outdoor Activities Pursued While NOT On a Trip

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market	10,787,235	159,723,006	170,510,241	100
Day outing to a park	77.8%	62.1%	63.1%	123
Cycling	77.3%	19.2%	22.9%	338
Swimming	74.0%	55.3%	56.5%	131
Exercising at home or at a fitness club	72.1%	55.0%	56.0%	129
Hiking	64.0%	30.4%	32.5%	197
Gardening	61.6%	52.5%	53.1%	116
Picnicking	60.1%	46.9%	47.7%	126
Camping	47.0%	25.3%	26.7%	176
Jogging	38.1%	18.3%	19.5%	195
Fishing	36.6%	32.5%	32.8%	112
Sailing or other boating	30.3%	19.3%	20.0%	152
Playing racquet sports (e.g., tennis or badminton)	27.1%	12.3%	13.2%	205
Playing team sports	26.3%	15.1%	15.8%	167
Canoeing or kayaking	25.7%	6.6%	7.8%	327
Hunting	24.0%	17.9%	18.3%	131
Rollerblading	16.5%	6.7%	7.3%	225
Downhill skiing	15.6%	5.0%	5.7%	274
Riding an all-terrain vehicle (ATV)	15.0%	11.2%	11.5%	131
Horseback riding	13.8%	8.2%	8.6%	161
Hunting	11.8%	11.8%	11.8%	100
Ice-skating	10.8%	5.1%	5.5%	197
Cross-country skiing	10.4%	2.0%	2.5%	414
Snowboarding	7.5%	2.4%	2.7%	278
Snowmobiling	6.4%	3.1%	3.3%	194
Skateboarding	5.3%	2.0%	2.2%	243



### Culture and Entertainment Activities Pursued While Not on Trip

Cyclists also participate in a variety of cultural and entertainment pursuits while NOT traveling. Most Cyclists visit local festivals or fairs, zoos or aquariums, amateur sports events, historic sites or heritage buildings and museums. Relative to the average U.S. Pleasure Traveler, they also exhibit an above-average interest in attending live performances (e.g., going to jazz clubs, the ballet, the opera, classical music concerts, rock or pop concerts), visiting art galleries or art shows, and going to day spas. Clearly, this affluent sector of the market has an active lifestyle with numerous and diverse cultural and entertainment interests.

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

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market	10,787,235	159,723,006	170,510,241	100
Going out to eat in restaurants	94.4%	92.7%	92.8%	102
Going to festivals or fairs	72.3%	65.0%	65.5%	110
Going to zoos or aquariums	54.6%	45.0%	45.6%	120
Going to amateur sporting events	52.5%	39.0%	39.9%	132
Going to historic sites or heritage buildings	51.1%	39.4%	40.1%	127
Going to museums	50.0%	36.6%	37.5%	133
Going to professional sporting events	44.5%	34.2%	34.9%	128
Going to amusement or theme parks	44.1%	37.7%	38.1%	116
Going to pick-your-own farms or farmers' market	42.4%	30.9%	31.6%	134
Going to art galleries or art shows	41.1%	26.9%	27.8%	148
Going to live theatre	38.2%	28.6%	29.2%	131
Going to bars with live pop or rock bands	32.6%	22.9%	23.6%	139
Going to rock music concerts	31.0%	20.6%	21.3%	146
Going dancing	27.8%	20.4%	20.8%	134
Going to botanical gardens	27.7%	19.4%	20.0%	139
Going to gamble in casinos	25.7%	28.2%	28.0%	92
Going to classical music concerts	22.3%	14.4%	14.9%	150
Going to day spas	16.6%	9.9%	10.3%	162
Staying overnight in a hotel or B&B in own city	15.4%	10.2%	10.6%	145
Going to jazz clubs	14.6%	7.5%	7.9%	185
Going to the ballet	11.4%	6.8%	7.0%	161
Going to rodeos	9.9%	8.1%	8.2%	121
Going to the opera	8.6%	5.5%	5.7%	150

### Accommodations Stayed In While on Trips

The most common types of vacation accommodation that Cyclists have used during the past two years are public campgrounds in national, state / provincial or municipal parks, and resorts in various settings (i.e., seaside, lakeside / riverside, skiing or mountain resorts). Relative to the average U.S. Pleasure Traveler, Cyclists are also more likely to have stayed in some of the more exotic accommodation types including remote or fly-in wilderness outposts / lodges, wine tasting schools, cooking schools and houseboats.

Fig. 11 Accommodations Stayed in While on Trips

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market	10,787,235	159,723,006	170,510,241	100
A Public Campground in a National, State, Provincial or Municipal Park	38.6%	15.5%	16.9%	228
Seaside Resort	34.4%	17.3%	18.3%	188
Lakeside/Riverside Resort	25.7%	11.6%	12.4%	206
Ski Resort or Mountain Resort	23.6%	8.0%	9.0%	263
A Private Campground	22.7%	9.3%	10.2%	222
A Camp Site in a Wilderness Setting (Not a Campground)	14.5%	4.0%	4.7%	309
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	9.0%	3.9%	4.2%	212
Wilderness Lodge You Can Drive to by Car	8.6%	3.1%	3.5%	246
Health Spa	8.3%	2.8%	3.1%	264
Country Inn or Resort with Gourmet Restaurant	5.2%	1.8%	2.0%	261
Farm or Guest Ranch	4.4%	1.8%	2.0%	221
On a Houseboat	4.3%	1.2%	1.4%	304
Remote or Fly-In Wilderness Lodge	2.3%	0.7%	0.8%	276
Remote or Fly-In Wilderness Outpost	2.0%	0.3%	0.4%	443
Cooking School	1.9%	0.5%	0.6%	330
Wine Tasting School	1.6%	0.3%	0.4%	366

### Tours and Cruises Taken During Past Two Years

Cyclists are more likely than the average U.S. Pleasure Traveler to have taken various tours or cruises during the past two years. They are especially likely to have taken both self-guided and organized sameday tours, tours around a city, and scenic drives in the country. Cyclists are also much more likely to have taken several of the more unusual tours and cruises including a Great Lakes cruise, a submarine cruise, an air trip as a pilot or passenger, a wilderness tour, a winery tour and a factory tour.

Fig. 12 Tours and Cruises Taken During Past Two Years

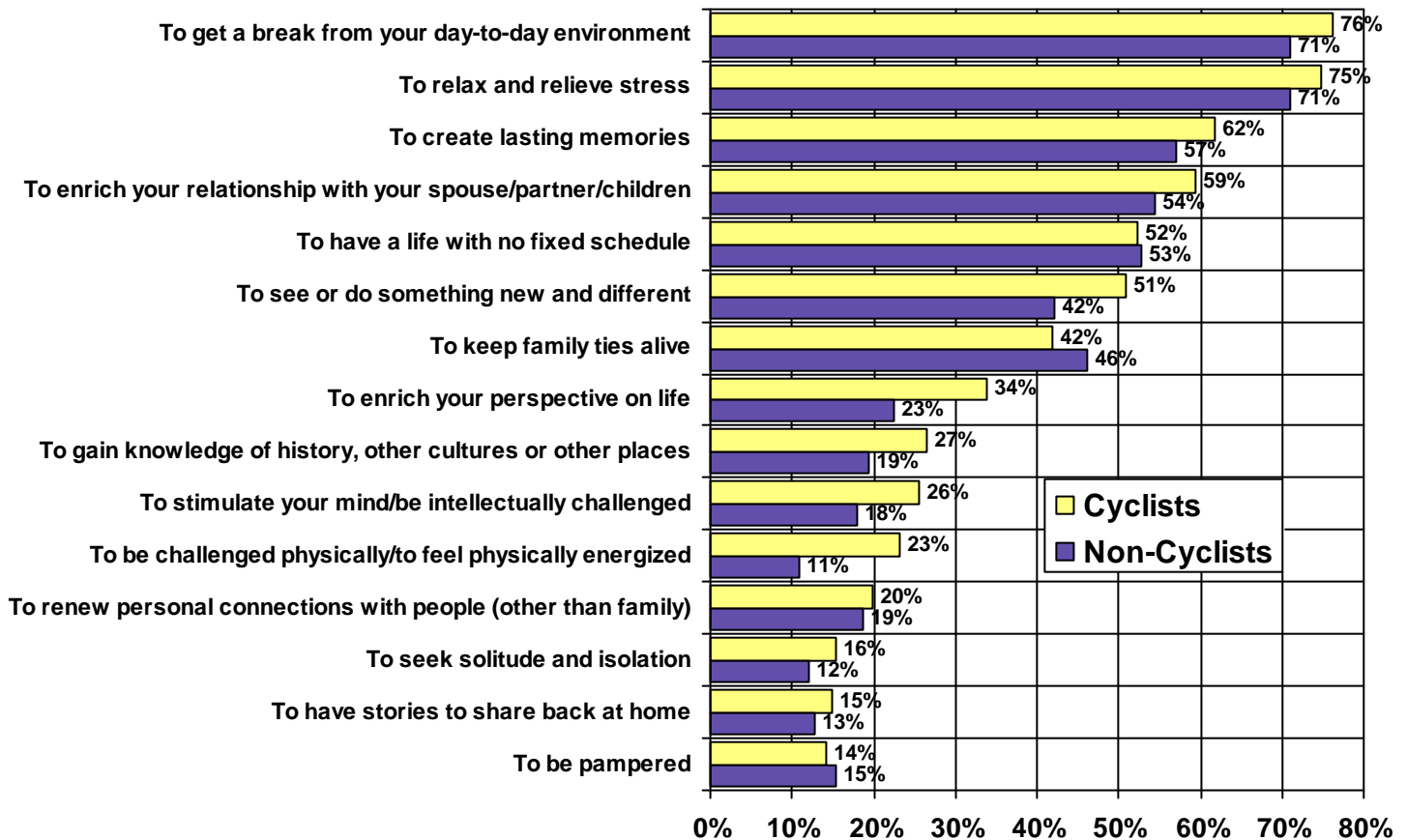
	Cyclists	Non-Cyclists	Pleasure Travelers	Index
<b>Size of Market</b>	<b>10,787,235</b>	<b>159,723,006</b>	<b>170,510,241</b>	<b>100</b>
A self-guided sameday tour while on an overnight trip	32.7%	18.3%	19.2%	170
An organized sameday guided tour while on an overnight trip	26.8%	18.0%	18.5%	144
Around the city	25.3%	15.1%	15.8%	160
Around the countryside - scenic drives	23.5%	12.4%	13.1%	180
A self-guided overnight tour where you stayed in different locations	18.8%	9.8%	10.4%	181
Wilderness tour	17.5%	6.8%	7.4%	235
On the water (sightseeing cruise)	15.0%	7.3%	7.8%	193
Some other type of tour	13.4%	8.5%	8.8%	151
An organized overnight guided tour where you stayed in different locations	13.1%	7.5%	7.9%	167
Caribbean ocean cruise	11.7%	8.8%	9.0%	130
An organized overnight guided tour where you stayed in a single location	10.4%	6.5%	6.7%	154
To a casino	8.1%	4.7%	4.9%	164
To a winery	7.6%	3.3%	3.6%	212
Ocean cruise - Other	7.0%	4.7%	4.8%	146
Alaskan ocean cruise	3.9%	2.4%	2.5%	156
Cruise on another lake or river	3.8%	1.9%	2.0%	190
To a factory	3.7%	1.7%	1.8%	205
In the air as a pilot or passenger of an airplane or helicopter	3.4%	1.3%	1.4%	243
Some other type of cruise	3.0%	1.6%	1.7%	176
Great Lakes cruise	1.1%	0.3%	0.4%	294
Submarine cruise	0.6%	0.2%	0.2%	244
Cruise on the St. Lawrence River	0.4%	0.3%	0.3%	139

### Benefits Sought While On a Vacation

The vacation benefits most commonly sought by those going cycling while on trips are similar to those of Non-Cyclists. Thus, like other U.S. Pleasure Travelers, Cyclists most often take vacations to get a break from their day-to-day environment, to relax and relieve stress, to create lasting memories, to enrich family relationships and to live without a fixed schedule.

However, relative to Non-Cyclists, Cyclists are more likely to regard personal challenges and growth as important benefits of a vacation experience. Thus Cyclists are more likely than Non-Cyclists to take vacations that are physically challenging and make them feel energized. They are also drawn to novel intellectual experiences and like to travel to see and do something different, enrich their perspective on life and explore the history and culture of other places. Their interest in intellectual stimulation while on vacation reflects the fact that this sector of the market is very well educated.

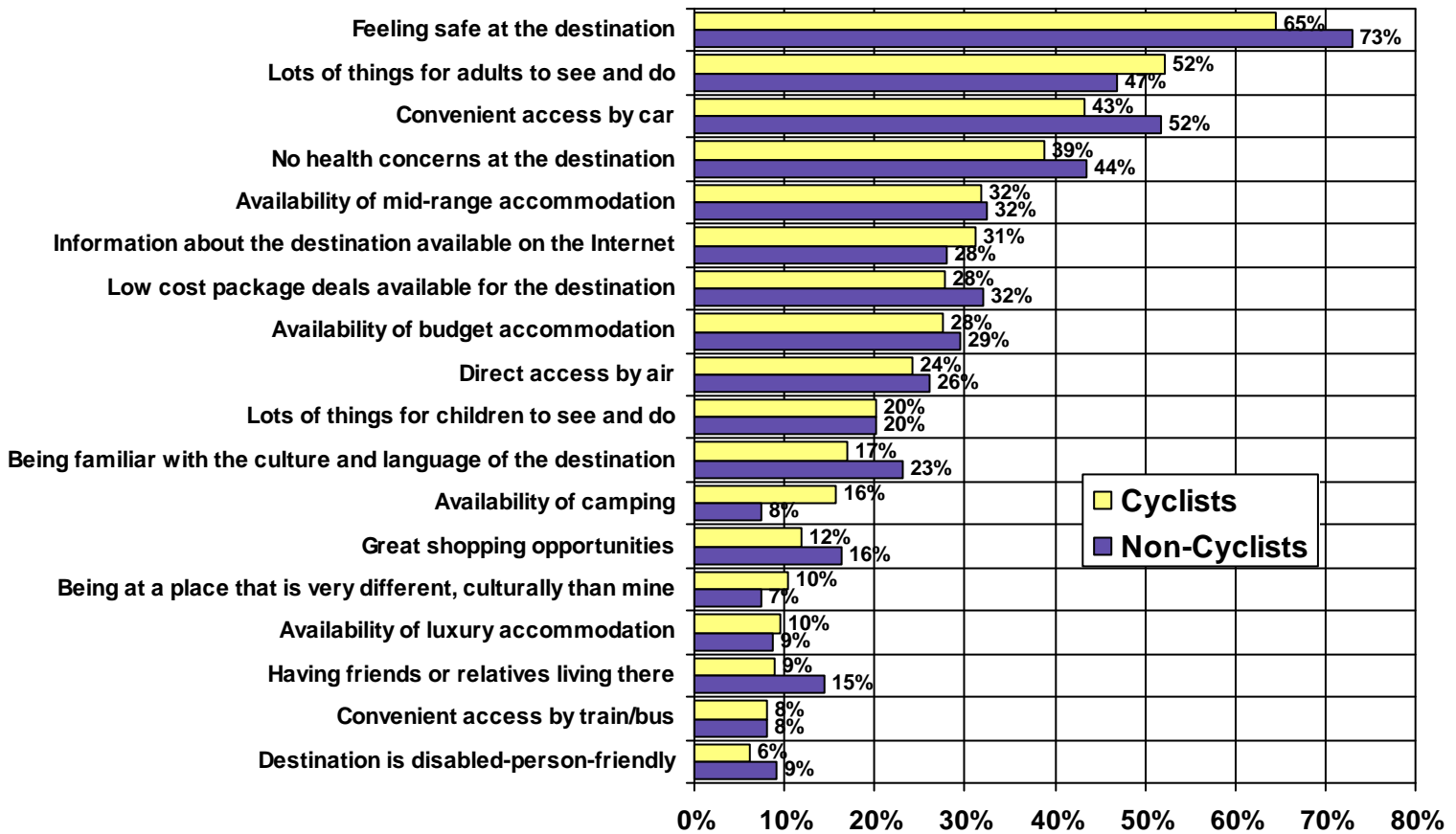
Fig.13 Benefits Sought While On a Vacation  
(Percent Rating Each Benefit as “Highly Important”)



### Other Attributes of a Destination Considered Important

Most Cyclists consider safety and having lots of things for adults to see and do as the most important attributes of a vacation destination. However, relative to Non-Cyclists, Cyclists are more likely to consider it important that a destination is distinctive culturally and offers camping facilities. On the other hand, they are less concerned as to whether the destination seems familiar or if they can speak the language. Cyclists also feel it is less important that the destination is conveniently accessible, has no health concerns, or that friends or relatives live there. Clearly, Cyclists approach vacations with a spirit of adventure.

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



### How Destinations are Selected

Those who go cycling while on trips were asked a series of questions concerning how they select destinations. Similar to the average U.S. Pleasure Traveler, the majority of Cyclists start with a particular destination in mind. However, Cyclists are more likely to start by considering the specific activities they would like to do while on vacation and are more likely to look for package deals when traveling during the winter.

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

	Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market	10,787,235	159,723,006	170,510,241	100
<b>Summer</b>				
Started with a desired destination in mind	58.6%	58.2%	58.2%	101
Started by considering specific activities wanted to do	12.5%	9.7%	9.9%	125
Started with a certain type of vacation experience in mind	18.8%	17.2%	17.3%	109
Looked for packaged deals – no destination in mind	1.2%	1.1%	1.1%	105
Considered something else first	3.4%	4.7%	4.6%	73
Don't know / Other	5.6%	9.1%	8.9%	63
<b>Winter</b>				
Started with a desired destination in mind	55.2%	59.3%	58.9%	94
Started by considering specific activities wanted to do	19.1%	10.6%	11.3%	170
Started with a certain type of vacation experience in mind	15.6%	14.7%	14.8%	106
Looked for packaged deals – no destination in mind	1.7%	1.4%	1.4%	121
Considered something else first	3.8%	5.5%	5.3%	72
Don't know / Other	4.6%	8.6%	8.3%	56

### Trip Planning and Information Sources Consulted

Those who go cycling on trips usually participate (60.9%) in the planning of the vacation. The most frequently consulted source of information is the Internet, although past experience and the advice of family and friends are also taken into consideration. Relative to the average U.S. Pleasure Traveler, Cyclists are more likely to obtain vacation travel information from travel guide books such as Fodor's, trade, travel and sports shows, electronic newsletters or magazines received by email, television programs, articles in newspapers or magazines, and official government travel brochures.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market		10,787,235	159,723,006	170,510,241	100
Who Plans Trips?	Respondent plans trips	41.9%	39.0%	39.2%	107
	Trip planning a shared responsibility	19.0%	17.5%	17.6%	108
	Someone else plans trips	39.2%	43.5%	43.2%	91
Information Sources Consulted	An Internet website	88.7%	75.1%	76.0%	117
	Past experience / Been there before	64.0%	53.8%	54.5%	118
	Advice of others / Word-of-mouth	60.2%	44.3%	45.4%	133
	Maps	45.4%	31.7%	32.7%	139
	An automobile club such as AAA	33.5%	23.3%	24.0%	139
	Official travel guides or brochures from state / province	33.5%	19.6%	20.6%	163
	Visitor information centres	31.2%	19.6%	20.4%	153
	Articles in newspapers / magazines	30.4%	17.3%	18.1%	168
	A travel agent	24.7%	18.2%	18.6%	132
	Travel guide books such as Fodor's	23.0%	11.2%	12.0%	192
	Travel information received in the mail	21.2%	15.4%	15.8%	134
	Advertisements in newspapers / magazines	16.4%	10.5%	10.9%	151
	Programs on television	12.8%	6.7%	7.1%	179
	An electronic newsletter or magazine received by e-mail	10.5%	5.7%	6.0%	175
	Advertisements on television	5.6%	3.9%	4.0%	141
Visits to trade, travel or sports shows	4.7%	2.3%	2.4%	192	

### Use of the Internet to Plan and Arrange Trips

The Internet is a particularly important tool for Cyclists both in planning trips (84.9%) and booking trip components (64.6%). Most Cyclists use travel planning / booking sites such as Expedia, and hotel and airline sites. Most Cyclists have booked accommodations and airline tickets over the Internet for a trip. They are also more likely than the average U.S. Pleasure Traveler to have used the Internet for purchasing a vacation package containing two or more items, and for obtaining rail, bus or boat / ship fares in advance.

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

		Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market		10,787,235	159,723,006	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	15.2%	32.0%	31.0%	49
	Uses Internet to plan trips only	20.3%	20.1%	20.1%	101
	Uses Internet to book part of trip	64.6%	47.9%	48.9%	132
Types of Websites Consulted	A travel planning / booking website	64.5%	54.9%	55.6%	116
	A website of a hotel or resort	61.6%	52.6%	53.3%	116
	An airline's website	55.6%	44.7%	45.6%	122
	A tourism website of a country / region / city	47.6%	34.0%	35.1%	136
	A website of an attraction	43.2%	32.5%	33.4%	129
	Some other website	33.3%	24.4%	25.1%	133
	A cruise line website	15.4%	12.2%	12.4%	124
	A motorcoach website	2.4%	1.2%	1.3%	178
Parts of Trips Booked Over The Internet	Accommodations	78.6%	71.2%	71.9%	109
	Air tickets	78.1%	69.9%	70.6%	111
	Car rental	47.5%	37.1%	38.0%	125
	Tickets or fees for specific activities or attractions	32.5%	25.8%	26.3%	123
	A package containing two or more items	25.8%	17.1%	17.8%	145
	Tickets for rail, bus or boat / ship fares	18.4%	11.3%	11.9%	155
	Other	3.7%	2.9%	2.9%	125

### Media Consumption Habits

Most Cyclists read the travel section of a weekend newspaper and visit travel-related websites. They also exhibit more interest than the average U.S. Pleasure Traveler in travel-related magazines and television programs. Cyclists' keen interest in a broad range of activities is reflected in their media preferences. Thus, relative to the average U.S. Pleasure Traveler, Cyclists are more likely to read a variety of different magazines (including outdoor activities & sports, photography, business, city lifestyle, science & geography). They are also more likely to listen to multicultural, jazz, classical, and alternative rock radio programs.

Fig. 18 Media Consumption Habits

		Cyclists	Non-Cyclists	Pleasure Travelers	Index
Size of Market		10,787,235	159,723,006	170,510,241	100
Newspaper Readership	Reads daily newspaper	61.5%	59.8%	59.9%	103
	Reads weekend edition of newspaper	58.3%	55.3%	55.5%	105
	Reads local neighbourhood or community newspapers	51.6%	49.4%	49.5%	104
	Reads other types of newspapers	18.8%	13.5%	13.9%	135
	Frequently or occasionally reads travel section of daily newspaper	49.5%	42.5%	43.0%	115
	Frequently or occasionally reads travel section of weekend newspaper	58.7%	48.7%	49.3%	119
Types of Magazines Read (Top 5 Indexed)	Outdoor activities/sports	22.1%	9.9%	10.7%	206
	Photography and video	7.2%	3.7%	3.9%	184
	Business, finance and investing	24.1%	13.3%	14.0%	172
	Magazines about your city	11.7%	6.6%	6.9%	170
	Travel (e.g., Condé Nast)	17.4%	10.2%	10.6%	164
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	36.9%	28.4%	28.9%	127
	Science & nature shows	43.0%	36.3%	36.8%	117
	Late night talk shows	30.3%	26.9%	27.1%	112
	Biography	36.2%	32.6%	32.9%	110
	History	49.5%	44.7%	45.0%	110
Type of Radio Programs Listened To (Top 5 Indexed)	Multicultural	8.1%	4.5%	4.7%	171
	Jazz/Big band	14.7%	9.7%	10.0%	147
	Classical music	19.6%	13.8%	14.1%	138
	Modern rock/Alternative rock	44.4%	32.1%	32.9%	135
	All sports	15.5%	11.7%	11.9%	130
Types of Websites Visited (Top 5 Indexed)	Magazine sites	19.4%	14.4%	14.8%	131
	Network news sites (e.g., CNN)	49.7%	37.8%	38.7%	128
	Travel	61.5%	46.9%	48.0%	128
	Sites for specific activities or interests	41.3%	31.9%	32.5%	127
	Newspaper sites	36.7%	29.1%	29.6%	124

### Appendix One: U.S. TAMS 2006 Outdoor Activity Segmentation

Activity Segment	Activities in Segment	
<b>Golfing</b>	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	
<b>Hunting</b>	Hunting for Small Game	Hunting for Birds
	Hunting for Big Game	
<b>Fishing</b>	Fresh-Water Fishing	Salt-Water Fishing
	Ice Fishing	Trophy Fishing
<b>Wildlife Viewing</b>	Viewing Land Based Animals	Bird Watching
	Whale Watching & Other Marine Life	Visited National, Provincial /State Park
	Wildflowers /Flora Viewing	Viewing Northern Lights
<b>Hiking, Climbing &amp; Paddling</b>	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
<b>Boating &amp; Swimming</b>	Motorboating	Swimming in Lakes
	Water Skiing	
<b>Ocean Activities</b>	Swimming in Oceans	Snorkelling in Sea /Ocean
	Sunbathing, Sitting on a Beach	Ocean Kayaking or Canoeing
<b>Sailing &amp; Surfing</b>	Sailing	Parasailing
	Wind Surfing	Kite Surfing
<b>Scuba &amp; Snorkelling</b>	Scuba Diving in Lakes /Rivers	Scuba Diving in Sea /Ocean
	Snorkelling in Lakes /Rivers	
<b>Exercising &amp; Jogging</b>	Working Out in Fitness Centre	Jogging or Exercising Outdoors
<b>Cycling</b>	Overnight Touring Trip	Recreational - Same Day Excursion
	Mountain Biking	
<b>Motorcycling</b>	Overnight Touring Trip	Same Day Excursion
<b>Horseback Riding</b>	With an Overnight Stop	Same Day Excursion
<b>Snowmobiling &amp; ATVing</b>	All Terrain Vehicle - Overnight Touring Trip	Snowmobiling As an Overnight Touring Trip
	All Terrain Vehicle - Same Day Excursion	Snowmobiling Day Use on Organized Trail
<b>Downhill Skiing &amp; Snowboarding</b>	Snowboarding	Downhill Skiing
<b>Cross-country Skiing &amp; Snowshoeing</b>	Cross-country Skiing	Snowshoeing
<b>Extreme Skiing</b>	Heli-Skiing	Cross Country or Back Country as an Overnight Touring Trip
	Ski Jouring	
<b>Hockey, Skating, Rollerblading &amp; Skateboarding</b>	Ice Hockey	In-Line /Rollerblading
	Ice Skating	Skateboarding
<b>Extreme Air Sports</b>	Parachuting	Hot Air Ballooning
	Hang Gliding	Bungee Jumping
<b>Team Sports</b>	Football	Basketball
	Baseball or Softball	Soccer
<b>Games &amp; Individual Sports</b>	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	
<b>Historical Sites, Museums &amp; Art Galleries</b>	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
<b>Shopping &amp; Dining</b>	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
<b>Aboriginal Cultural Experiences</b>	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
<b>Fairs &amp; Festivals</b>	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
<b>Science &amp; Technology Exhibits</b>	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
<b>Theme Parks &amp; Exhibits</b>	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Wax Museums
<b>High Art Performances</b>	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	Jazz Concert
<b>Professional Sporting Events</b>	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	
<b>Theatre, Film &amp; Musical Festivals</b>	Theatre Festivals	International Film Festivals
	Comedy Festivals	Music Festivals
	Literary Festivals or Events	
<b>Tastings</b>	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)
<b>Casino, Theatre &amp; Comedy Clubs</b>	Stand-Up Comedy Clubs and Other Variety Shows	Live Theatre with Dinner
	Went to a Casino	Live Theatre
<b>Participatory Historical Activities</b>	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National/Provincial Park
	Curatorial Tours	
<b>National &amp; International Sporting Events</b>	National/International Sporting Events such as the Olympic Games	Curling Bonspiel
	Professional Figure Skating	Professional Soccer Games

<b>Appendix Two</b>		
<b>U.S. TAMS 2006 Culture and Entertainment Segmentation</b>		
<b>Gardens Theme Attractions</b>	Garden Theme Park	Botanical Gardens
<b>Rock Concerts &amp; Dancing</b>	Rock & Roll /Popular Music Concert	Recreational Dancing
<b>Archaeological Digs &amp; Sites</b>	Archaeological Digs	Paleontological /Archaeological Sites
<b>Equestrian &amp; Western Events</b>	Equine (Horse) Competitions	Country /Western Music Concerts
	Western Theme Events (e.g., Rodeos)	Auto Races
	Horse Races	
<b>Fine Dining &amp; Spas</b>	High-End Restaurants with an International Reputation	Day Visit to a Health and Wellness Spa while on an Overnight Trip
	Other High-End Restaurants	
<b>Agro-Tourism</b>	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)
<b>Amateur Tournaments</b>	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related