

U.S. TRAVEL MARKET

Participating in Extreme Air Sports 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



Executive Summary

Over the last two years, 1.3% (2,940,847) of adult Americans participated in an Extreme Air Sport while on an out-of-town, overnight trip of one or more nights. Hot air ballooning (0.7%) was the most popular Extreme Air Sport activity, followed by parachuting (0.3%), bungee jumping (0.3%) and hang gliding (0.2%). Among those who participated in an Extreme Air Sport while on a trip, 37.9% (1,115,294) reported that this activity was the main reason for taking at least one trip during the past two years.

Those who participated in an Extreme Air Sport while on a trip are predominantly young (18 to 34 years old), single and male. They are more affluent than the average U.S. Pleasure Traveler with higher household incomes and post-graduate education.

Those who participated in an Extreme Air Sport while on a trip were more than twice as likely as the average U.S. Pleasure Traveler to have taken a trip to Canada in the past two years (32.2% versus 14.6%). The most common destinations were Ontario, British Columbia and Quebec. However this sector is over-represented among U.S. Pleasure Travelers to all Canadian provinces and territories.

Travelers in this category seek vacation destinations and activities that provide them with new or unique experiences. They participate in a full range of physically challenging outdoor activities while on trips, and are much more likely than the average U.S. Pleasure Traveler to engage in unusual or skilled outdoor activities, such as extreme skiing, downhill skiing and snowboarding, sailing and surfing, and scuba and snorkelling.

Those who participated in an Extreme Air Sport while on a trip also participate in a variety of cultural and entertainment activities when traveling. They were much more likely than the average U.S. Pleasure Traveler to attend sporting events as well as theatre, film and musical festivals, high art performance and rock concerts while on a trip. They were also more likely to have taken part in participatory historical activities, archaeological digs, aboriginal cultural experiences and agro-tourism while traveling.

Those who participated in an Extreme Air Sport while on a trip frequently visit travel-related websites and are more likely than the average U.S. Pleasure Traveler to book travel online. They are also more likely than the average U.S. Pleasure Traveler to read the travel sections in newspapers and travel magazines and to watch travel-related programs on television. Therefore, travel-oriented media are the most effective way to reach this sector of the travel market.

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 participated in an Extreme Air Sport while on a 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.

Playing Extreme Air Sports While on Trips

Market Incidence

Over the last two years, 1.3% (2,940,847) of adult Americans participated in an Extreme Air Sport while on an out-of-town, overnight trip of one or more nights. Hot air ballooning (0.7%) was the most popular Extreme Air Sport, followed by parachuting (0.3%), bungee jumping (0.3%), and hang gliding (0.2%).

Of those who participated in an Extreme Air Sport while on a trip, 37.9% (1,115,294) reported that this activity was the main reason for taking at least one trip in the past two years. Hot air ballooning (42.1%) and parachuting (38.0%) were more likely than bungee jumping (25.0%) or hang gliding (21.3%) to have been cited as the main reason for taking at least one trip.

Fig. 1 Incidence of Playing Extreme Air Sports While on Trips¹

Size of Market	Number Who Participated in an Extreme Air Sport ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total U.S. Population ⁵
Extreme Air Sports (All Activities)	2,940,847	37.9%	1.7%	1.3%
Hot air ballooning	1,642,626	42.1%	1.0%	0.7%
Parachuting	715,225	38.0%	0.4%	0.3%
Bungee jumping	715,071	25.0%	0.4%	0.3%
Hang gliding	375,262	21.3%	0.2%	0.2%
Participated in all four Extreme Air Sport activities	48,422	8.8%	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- "Those who participated in an Extreme Air Sport" are defined as persons who went hot air ballooning, parachuting, bungee jumping or hang gliding on at least one 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 these activities 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

Those who participated in an Extreme Air Sport while on a trip are not concentrated in any single area of the United States. They tend to be over-represented relative to the average U.S. Pleasure Traveler in Alaska, the New England states, and the Pacific, Mountain and the East South Central regions of the United States. They are slightly more likely to live in larger urban centers with populations of 500,000 or more.

Fig. 2 Geographic Distribution & Population Size of Those Who Play Extreme Air Sports While on Trips

	Total Population	Estimated Number Who Participated in an Extreme Air Sport on a Trip	Percent of Pleasure Travelers in Region Who Participated in an Extreme Air Sport on a Trip	Percent of Total Regional Population Who Participated in an Extreme Air Sport on a Trip
United States	222,846,268	2,940,847	1.7%	1.3%
New England	11,095,629	195,682	2.3%	1.8%
Middle Atlantic	31,005,526	401,727	1.7%	1.3%
East North Central	34,621,254	400,799	1.5%	1.2%
West North Central	15,024,360	191,649	1.6%	1.3%
South Atlantic	42,602,998	432,207	1.3%	1.0%
East South Central	13,597,436	195,036	2.0%	1.4%
West South Central	24,853,901	221,570	1.2%	0.9%
Mountain	15,030,720	264,110	2.2%	1.8%
Pacific	34,529,689	624,131	2.2%	1.8%
Alaska	484,754	13,935	3.3%	2.9%
Not Available	745,757	18,780	3.0%	2.5%
Less than 100,000	29,429,442	326,783	1.6%	1.1%
100,000 to 499,999	36,551,501	412,521	1.5%	1.1%
500,000 to 1,999,999	52,335,815	706,713	1.8%	1.4%
2,000,000 or more	103,783,753	1,476,049	1.8%	1.5%

Those who participated in an Extreme Air Sport while on a trip are most likely to be from New Mexico, Maine, Alaska, Nebraska, Oregon, Kansas and Colorado. They are least likely to reside in Oklahoma, West Virginia, Arkansas, District of Columbia and South Carolina (see Fig. 3 on next page).

Demographic Profile

Those who participated in an Extreme Air Sport while on a trip tend to be more affluent than the average U.S. Pleasure Traveler with higher household incomes and university education. They are more often male, unmarried and between 18 and 34 years old.

Fig. 4 Demographic Profile of Those Playing Extreme Air Sports Relative to All U.S. Pleasure Travelers

Attribute	Size of Market	Participated in an Extreme Air Sport	Did Not Participate in an Extreme Air Sport ¹	Pleasure Travelers	Index ²
		2,940,847	167,569,394	170,510,241	100
Gender	Male	58.5%	48.4%	48.5%	120
	Female	41.5%	51.6%	51.5%	81
Age of Respondent	18 to 24	15.7%	10.7%	10.8%	145
	25 to 34	25.2%	20.9%	21.0%	120
	35 to 44	14.4%	17.3%	17.3%	83
	45 to 54	17.6%	21.1%	21.0%	84
	55 to 64	16.9%	15.4%	15.5%	109
	65 Plus	10.3%	14.5%	14.4%	71
Average Age		42.5	45.5	45.4	N/A
Marital Status	Not married	34.1%	30.5%	30.5%	112
	Married	65.9%	69.5%	69.5%	95
Parental Status	No children under 18	79.0%	69.9%	70.0%	113
	Children under 18	21.0%	30.1%	30.0%	70
Education	High school or less	14.3%	20.6%	20.5%	70
	Trade, Technical, Community Col.	22.2%	21.4%	21.4%	104
	University Degree	43.0%	41.0%	41.1%	105
	Post Graduate Degree	20.5%	17.0%	17.1%	120
Household Income	Under \$20,000	8.4%	8.1%	8.1%	104
	\$20,000 to \$39,999	11.4%	16.3%	16.2%	70
	\$40,000 to \$59,999	16.3%	16.7%	16.7%	98
	\$60,000 to \$79,999	12.9%	14.7%	14.7%	88
	\$80,000 to \$99,999	10.0%	11.6%	11.6%	87
	\$100,000 to \$149,999	17.9%	14.3%	14.4%	125
	\$150,000 or more	12.0%	6.6%	6.7%	180
Not stated	11.0%	11.7%	11.7%	94	
Average Household Income		\$87,454	\$74,071	\$74,303	N/A

- 1- "Those Who Did Not Participate in an Extreme Air Sport" 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 an Extreme Air Sport on any trip. The numbers of persons who "Participated in an Extreme Air Sport" and the number who "Did not participate in an Extreme Air Sport" equal the number of Pleasure Travelers.
- 2- The "Index" is calculated by dividing the percent who participated in an Extreme Air Sports in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which those who participated in an Extreme Air Sport while on a trip 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)

Those who participated in an Extreme Air Sport while on a trip are frequent travelers and more likely than the average U.S. Pleasure Traveler to have taken a trip within their own state or to another U.S. state in the past in the past two years. They were also more likely than the average U.S. Pleasure Traveler to have visited Mexican, Caribbean and other overseas destinations.

Those participating in an Extreme Air Sport while on a trip were more than twice as likely as the average U.S. Pleasure Traveler to have taken a trip to Canada in the past two years (32.2% versus 14.6%). They were especially likely to have taken trips to Ontario (20.2%), Quebec (13.0%) and British Columbia (10.2%). In relative terms, they were considerably more likely than the average U.S. Pleasure Traveler to have visited all of the Canadian provinces or territories, especially Newfoundland and Labrador, Manitoba, Saskatchewan and New Brunswick.

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

	Participated in an Extreme Air Sport	Did Not Participate in an Extreme Air Sport	Pleasure Travelers	Index
Size of Market	2,940,847	167,569,394	170,510,241	100
All destinations	94.6%	85.3%	85.4%	111
Canada	32.2%	14.3%	14.6%	221
Newfoundland and Labrador	3.1%	0.4%	0.4%	749
Prince Edward Island	2.7%	0.6%	0.6%	447
New Brunswick	4.2%	0.8%	0.8%	514
Nova Scotia	5.7%	1.3%	1.3%	428
Quebec	13.0%	2.9%	3.1%	418
Ontario	20.2%	8.1%	8.3%	244
Manitoba	3.1%	0.5%	0.5%	592
Saskatchewan	3.1%	0.4%	0.5%	633
Alberta	4.6%	1.1%	1.2%	385
British Columbia	10.2%	4.0%	4.1%	248
Yukon	2.8%	0.5%	0.6%	490
Northwest Territories	2.2%	0.4%	0.4%	556
Nunavut	0.3%	0.0%	0.0%	588
Own State	88.1%	79.6%	79.7%	111
Other parts of United States	95.4%	90.5%	90.6%	105
Mexico	31.8%	13.3%	13.6%	234
Caribbean	26.6%	12.5%	12.7%	209
All other destinations	27.7%	9.2%	9.6%	290

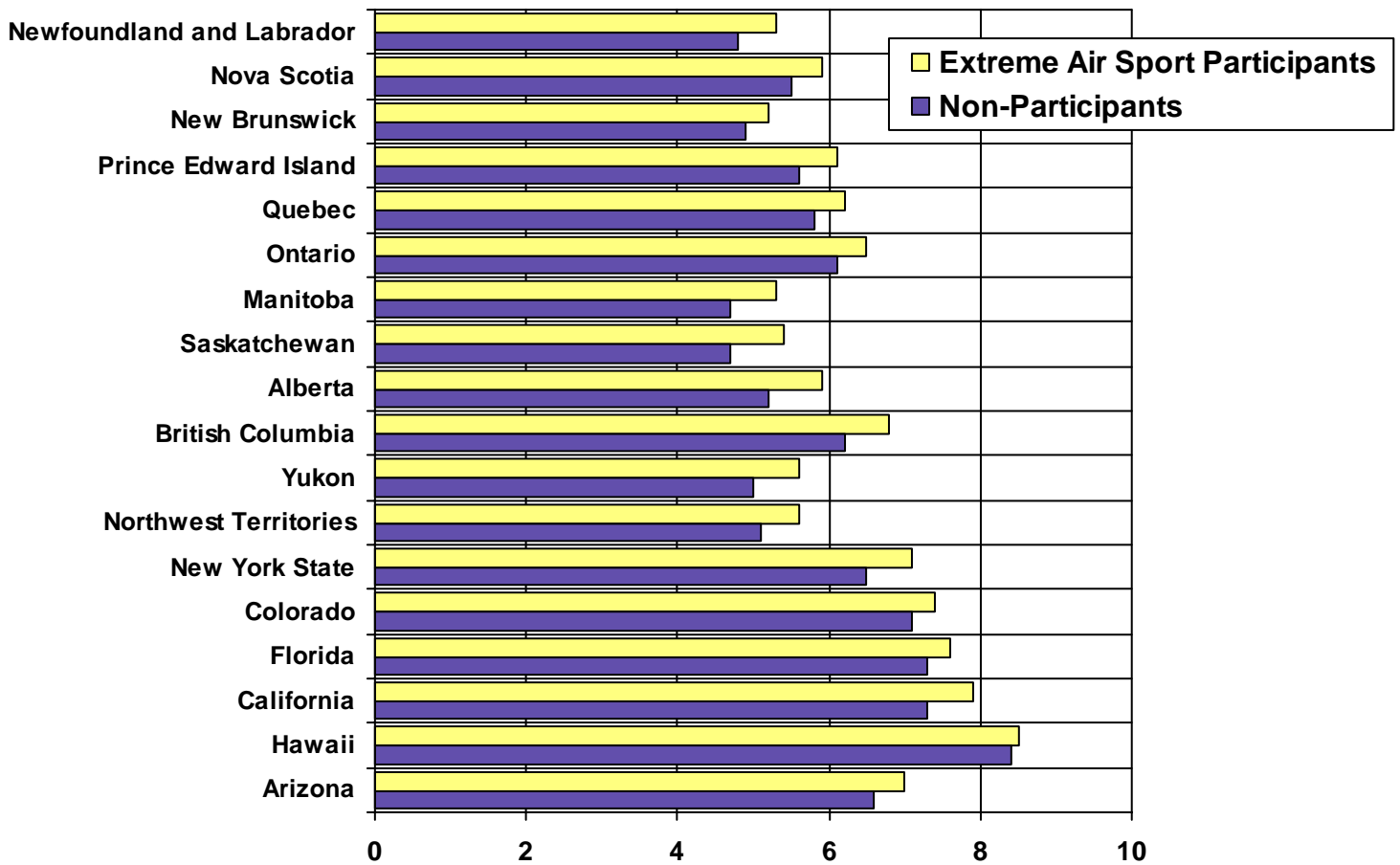
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

The respondents were asked to rate the appeal of each of Canada's provinces as well as the Yukon and the Northwest 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 those who participated in an Extreme Air Sport while on a trip tend to be higher than the ratings of non-participants regardless of the destination. British Columbia (6.8) is rated as the most appealing province, followed by Ontario, Quebec and Prince Edward Island.

U.S. Pleasure Travelers as a whole tend to rate the six reference U.S. states as more appealing than any of the Canadian provinces or territories. Hawaii (8.5) receives the highest rating among those who participated in an Extreme Air Sport while on a trip.

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

Those who participated in an Extreme Air Sport while on a trip also participated in a wide range of other outdoor activities while traveling. Most participated in ocean activities, wildlife viewing, and hiking, climbing and paddling on at least one trip in the past two years. Relative to the average U.S. Pleasure Traveler, those who participated in an Extreme Air Sport while on a trip were much more likely to have gone extreme skiing (e.g., heli-skiing). They were also much more likely to have engaged in other high-energy winter activities (e.g., cross-country skiing and snowshoeing, downhill skiing and snowboarding) and summer activities (e.g., sailing and surfing, scuba and snorkelling) while on a trip.

These patterns suggest that those who participate in Extreme Air Sports seek excitement, novelty, physical stimulation and physical challenges when they travel.

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

	Participated in an Extreme Air Sport	Did Not Participate in an Extreme Air Sport	Pleasure Travelers	Index
Size of Market	2,940,847	167,569,394	170,510,241	100
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	63.4%	39.2%	39.6%	160
Wildlife Viewing	56.9%	34.5%	34.9%	163
Hiking, Climbing & Paddling	51.9%	23.0%	23.5%	221
Games & Individual Sports (e.g., tennis, board games)	48.1%	21.8%	22.2%	217
Boating & Swimming (e.g., motorboating, swimming in lakes)	47.3%	20.6%	21.0%	225
Exercising and Jogging	34.5%	13.7%	14.1%	245
Fishing	32.6%	18.1%	18.4%	177
Downhill Skiing & Snowboarding	28.7%	7.7%	8.0%	357
Sailing and Surfing (e.g., sailing, windsurfing, parasailing)	26.9%	4.4%	4.8%	564
Horseback Riding	25.1%	5.8%	6.2%	408
Cycling	24.6%	6.0%	6.3%	389
Snowmobiling & ATVing	24.5%	6.8%	7.1%	343
Team Sports (e.g., football, baseball, basketball)	24.3%	7.6%	7.9%	308
Board and Blade (e.g., skateboarding, ice-skating)	22.2%	3.7%	4.0%	552
Golfing	21.5%	10.5%	10.7%	202
Scuba & Snorkelling	19.5%	3.8%	4.1%	479
Hunting	12.7%	5.3%	5.4%	235
Motorcycling	12.6%	2.9%	3.1%	411
Cross-country Skiing & Snowshoeing	11.1%	1.7%	1.9%	592
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	4.1%	0.3%	0.3%	1247

Outdoor Activities Pursued While Not on Trips

The very high level of activity exhibited by those who participated in an Extreme Air Sport while on a trip is also apparent when they are NOT traveling. The majority go on day outings to parks, swim, exercise at home or at a fitness club, go on picnics, garden and hike while not traveling. Relative to the average U.S. Pleasure Traveler, they are much more likely to participate in strenuous, outdoor activities such as cross-country and downhill skiing, snowboarding and skateboarding.

Fig. 8 Outdoor Activities Pursued While NOT on Trips

	Participated in an Extreme Air Sport	Did Not Participate in an Extreme Air Sport	Pleasure Travelers	Index
Size of Market	2,940,847	167,569,394	170,510,241	100
Day outing to a park	73.6%	62.9%	63.1%	117
Swimming	68.0%	56.3%	56.5%	120
Exercising at home or at a fitness club	64.8%	55.9%	56.0%	116
Picnicking	56.9%	47.6%	47.7%	119
Gardening	52.5%	53.1%	53.1%	99
Hiking	52.2%	32.1%	32.5%	161
Cycling	41.3%	22.5%	22.9%	181
Camping	40.7%	26.4%	26.7%	152
Fishing	38.3%	32.7%	32.8%	117
Sailing or other boating	36.4%	19.7%	20.0%	182
Jogging	35.7%	19.2%	19.5%	183
Playing racquet sports (e.g., tennis or badminton)	27.6%	12.9%	13.2%	209
Horseback riding	27.4%	8.3%	8.6%	319
Playing team sports	27.2%	15.6%	15.8%	172
Hunting	27.0%	18.1%	18.3%	148
Riding an all-terrain vehicle (ATV)	22.5%	11.3%	11.5%	196
Canoeing or kayaking	19.5%	7.6%	7.8%	249
Rollerblading	17.9%	7.1%	7.3%	244
Downhill skiing	16.7%	5.5%	5.7%	293
Hunting	16.5%	11.7%	11.8%	140
Ice-skating	13.5%	5.4%	5.5%	246
Snowmobiling	10.5%	3.2%	3.3%	318
Cross-country skiing	10.1%	2.4%	2.5%	403
Snowboarding	9.8%	2.6%	2.7%	364
Skateboarding	7.2%	2.1%	2.2%	328

Culture and Entertainment Activities Pursued While on Trips

Those who participated in an Extreme Air Sport while on a trip were much more likely than the average U.S. Pleasure Traveler to have attended national and international sporting events, professional sporting events and amateur sporting events. They were also more likely to have attended theatre, film and music festivals, high art performances, and rock concerts and to have gone recreational dancing while on a trip. Relative to the average U.S. Pleasure Traveler, those who participated in an Extreme Air Sport while on a trip were also more likely to have taken part in participatory historical activities, archaeological digs, aboriginal cultural experiences and agro-tourism.

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

	Participated in an Extreme Air Sport	Did Not Participate in an Extreme Air Sport	Pleasure Travelers	Index
Size of Market	2,940,847	167,569,394	170,510,241	100
Shopping and Dining	90.8%	77.5%	77.7%	117
Casino, Theatre and Comedy Clubs	75.3%	44.9%	45.4%	166
Historical Sites, Museums & Art Galleries	75.1%	53.1%	53.5%	140
Theme Parks & Exhibits	75.0%	48.5%	49.0%	153
Fairs and Festivals	73.1%	40.4%	41.0%	178
Fine Dining and Spas	61.6%	32.4%	33.0%	187
Wine, Beer and Food Tastings	56.8%	22.3%	22.9%	248
Science and Technology Exhibits	55.4%	24.3%	24.8%	223
Rock Concerts and Recreational Dancing	45.7%	14.7%	15.3%	300
Equestrian & Western Events	45.0%	14.9%	15.5%	291
Professional Sporting Events	43.2%	15.6%	16.1%	268
Agro-Tourism	39.7%	13.1%	13.5%	293
High Art Performances	37.2%	10.5%	10.9%	340
Garden Theme Attractions	35.6%	13.3%	13.7%	261
Theatre, Film & Musical Festivals	34.2%	7.9%	8.3%	411
Aboriginal Cultural Experiences	28.2%	8.2%	8.6%	328
Amateur Tournaments	21.3%	7.4%	7.7%	277
Archaeological Digs & Sites	18.0%	5.3%	5.5%	326
Participatory Historical Activities	15.6%	3.7%	3.9%	398
National & International Sporting Events	13.2%	1.7%	1.9%	708

Culture and Entertainment Activities Pursued While Not on Trips

Those who participated in an Extreme Air Sport while on a trip are more likely than the average U.S. Pleasure Traveler to undertake a wide range of cultural and entertainment pursuits when NOT traveling. Most in this segment are avid consumers of local cultural and entertainment attractions when not traveling, including restaurants, festivals and fairs, zoos or aquariums, historic sites or heritage buildings, amusement or theme parks, museums, and amateur and professional sports events.

It is of interest to note that those who participated in an Extreme Air Sport while on a trip are more likely than the average U.S. Pleasure Traveler to visit theme parks and exhibits, festival and fairs and historical sites, museums or heritage buildings while not traveling, but less likely than the average U.S. Pleasure Traveler to have visited these attractions while on a trip. This suggests that the vacation pursuits of those who participated in an Extreme Air Sport tend to differ from the pursuits they undertake while not traveling.

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

	Participated in an Extreme Air Sport	Did Not Participate in an Extreme Air Sport	Pleasure Travelers	Index
Size of Market	2,940,847	167,569,394	170,510,241	100
Going out to eat in restaurants	94.8%	92.8%	92.8%	102
Going to festivals or fairs	78.5%	65.2%	65.5%	120
Going to zoos or aquariums	58.9%	45.4%	45.6%	129
Going to historic sites or heritage buildings	56.2%	39.9%	40.1%	140
Going to amusement or theme parks	53.9%	37.8%	38.1%	141
Going to museums	53.4%	37.2%	37.5%	142
Going to amateur sporting events	51.5%	39.7%	39.9%	129
Going to professional sporting events	50.7%	34.6%	34.9%	145
Going to art galleries or art shows	47.5%	27.4%	27.8%	171
Going to live theatre	47.4%	28.8%	29.2%	162
Going to bars with live pop or rock bands	41.0%	23.3%	23.6%	174
Going to pick-your-own farms or farmers' market	40.7%	31.4%	31.6%	129
Going to gamble in casinos	39.4%	27.8%	28.0%	141
Going dancing	38.9%	20.5%	20.8%	187
Going to rock music concerts	38.0%	21.0%	21.3%	179
Going to botanical gardens	32.1%	19.8%	20.0%	161
Going to classical music concerts	27.1%	14.7%	14.9%	182
Going to day spas	25.1%	10.0%	10.3%	244
Staying overnight in a hotel or B&B in own city	23.8%	10.3%	10.6%	225
Going to jazz clubs	22.9%	7.7%	7.9%	289
Going to rodeos	18.9%	8.0%	8.2%	231
Going to the ballet	15.7%	6.9%	7.0%	222
Going to the opera	14.7%	5.6%	5.7%	256

Accommodations Stayed In While on Trips

Those who participated in an Extreme Air Sport while on a trip were most likely to have stayed at a seaside resort or at a public campground during the past two years. Relative to the average U.S. Pleasure Traveler, they were more likely to have stayed in all types of accommodations, and especially the more exotic accommodation types (e.g., wine tasting or cooking school, a remote or fly-in wilderness outpost or lodge, houseboat, health spa, country inn or resort with gourmet restaurant, farm or guest ranch).

Fig. 11 Accommodations Stayed In While on Trips

	Participated in an Extreme Air Sport	Did Not Participate in an Extreme Air Sport	Pleasure Travelers	Index
Size of Market	2,940,847	167,569,394	170,510,241	100
Seaside Resort	47.6%	37.4%	37.7%	126
A Public Campground in a National, State, Provincial or Municipal Park	47.1%	34.5%	34.8%	135
Lakeside/Riverside Resort	41.4%	25.1%	25.6%	162
Ski Resort or Mountain Resort	35.5%	17.9%	18.4%	192
A Private Campground	27.2%	20.8%	20.9%	130
Health Spa	23.7%	6.0%	6.5%	367
A Camp Site in a Wilderness Setting (Not a Campground)	21.1%	9.3%	9.6%	219
Wilderness Lodge You Can Drive to by Car	16.3%	6.9%	7.2%	228
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	15.8%	8.5%	8.7%	181
On a Houseboat	14.7%	2.6%	2.9%	499
Country Inn or Resort with Gourmet Restaurant	14.4%	3.8%	4.1%	352
Farm or Guest Ranch	13.9%	3.8%	4.1%	339
Remote or Fly-In Wilderness Lodge	10.1%	1.4%	1.7%	599
Cooking School	8.8%	1.0%	1.2%	748
Wine Tasting School	7.5%	0.7%	0.9%	862
Remote or Fly-In Wilderness Outpost	7.1%	0.7%	0.9%	781

Tours and Cruises Taken During Past Two Years

Those who participated in an Extreme Air Sport while on a trip were much more likely than the average U.S. Pleasure Traveler to have taken all types of tours or cruises during the past two years. Relative to the average U.S. Pleasure Traveler, they were especially likely to have taken an air tour as pilot or passenger of an airplane or helicopter, a winery tour, a factory tour and an organized overnight guided tour with stays in different locations. They were also much more likely than the average U.S. Pleasure Traveler to have taken unusual cruises such as a Great Lakes cruise, a St. Lawrence River cruise, a submarine cruise or a cruise on another lake or river during the past two years.

Fig. 12 Tours and Cruises Taken During Past Two Years

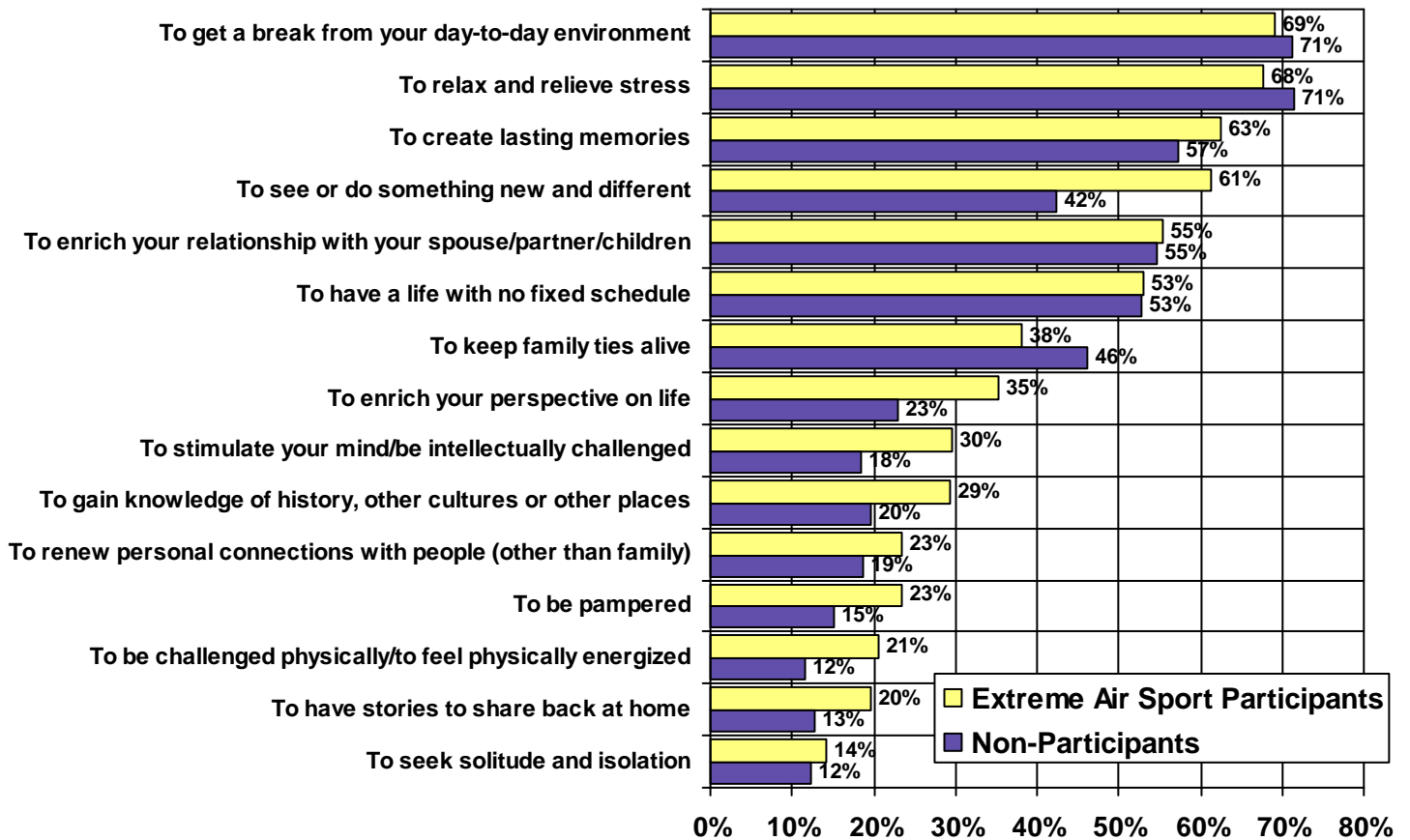
	Participated in an Extreme Air Sport	Did Not Participate in an Extreme Air Sport	Pleasure Travelers	Index
Size of Market	2,940,847	167,569,394	170,510,241	100
A self-guided sameday tour while on an overnight trip	33.9%	18.9%	19.2%	176
An organized sameday guided tour while on an overnight trip	33.8%	18.3%	18.5%	182
Around the city	30.6%	15.5%	15.8%	194
Around the country side - scenic drives	27.9%	12.8%	13.1%	213
A self-guided overnight tour where you stayed in different locations	26.6%	10.1%	10.4%	256
An organized overnight guided tour where you stayed in different locations	25.1%	7.6%	7.9%	319
On the water (sightseeing cruise)	19.7%	7.6%	7.8%	254
An organized overnight guided tour where you stayed in a single location	18.7%	6.5%	6.7%	277
Caribbean ocean cruise	18.4%	8.8%	9.0%	205
Wilderness tour	17.9%	7.3%	7.4%	241
Some other type of tour	16.2%	8.7%	8.8%	183
To a winery	14.6%	3.4%	3.6%	409
To a casino	13.8%	4.7%	4.9%	282
Ocean cruise - Other	11.6%	4.7%	4.8%	242
In the air as a pilot or passenger of an airplane or helicopter	7.7%	1.3%	1.4%	548
To a factory	7.4%	1.7%	1.8%	407
Some other type of cruise	7.2%	1.6%	1.7%	418
Cruise on another lake or river	6.5%	1.9%	2.0%	328
Alaskan ocean cruise	6.4%	2.4%	2.5%	258
Great Lakes cruise	4.1%	0.3%	0.4%	1041
Cruise on the St. Lawrence River	2.5%	0.2%	0.3%	885
Submarine cruise	1.6%	0.2%	0.2%	652

Benefits Sought While on Vacation

As with most U.S. Pleasure Travelers, those who participated in an Extreme Air Sport while on a trip generally take vacations in order to get a break from their day-to-day environment, to relax and relieve stress, to create lasting memories, to do something new and different, to enrich family relationships and to live without a fixed schedule.

Relative to the average U.S. Pleasure Traveler, those who participated in an Extreme Air Sport while on a trip are much more likely to seek out novel experiences and challenges when they travel. Thus, they are much more likely than the average U.S. Pleasure Traveler to go to places where they can see or do something different, be intellectually and physically challenged, gain knowledge of the history and culture of other places and enrich their perspective on life. On the other hand, those who participated in an Extreme Air Sport while on a trip are less likely than the average U.S. Pleasure Traveler to take vacations in order to strengthen family ties.

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

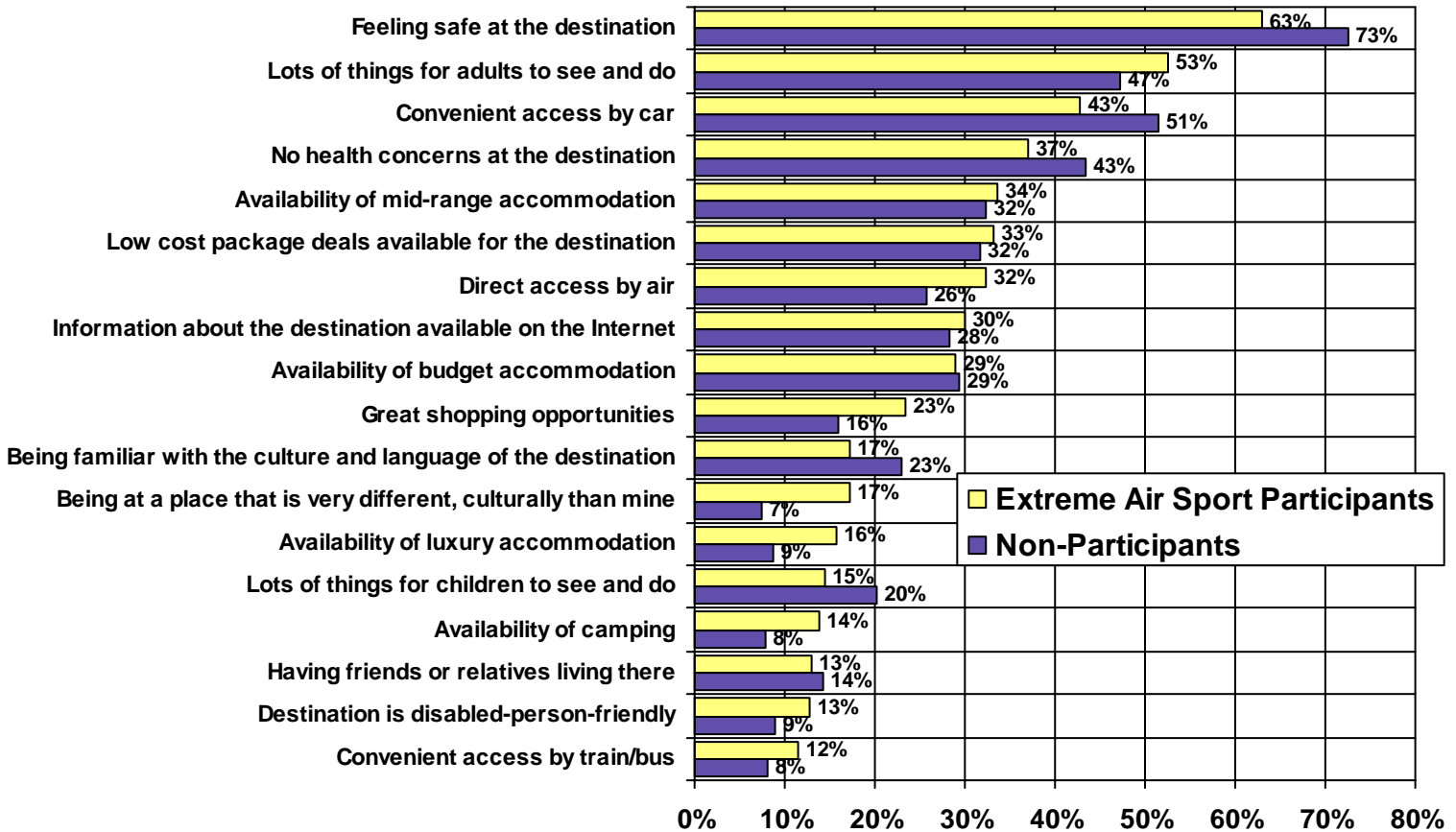


Other Attributes of a Destination Considered Important

The majority of those who participated in an Extreme Air Sport while on a trip 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 the average U.S. Pleasure Traveler, those who participated in an Extreme Air Sport while on a trip are drawn to destinations that have lots to see and do, distinctive cultures, great shopping opportunities, luxurious accommodations or camping and direct accessibility by air. They are less concerned than the average U.S. Pleasure Traveler that the destination is safe with no health concerns, is easily accessible by car or has a lot of things for children to see and do.

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. Similar to the average U.S. Pleasure Traveler, the majority of those who participated in an Extreme Air Sport while on a trip start with a particular destination in mind. However, they are more likely than the average U.S. Pleasure Traveler to start their vacation planning by considering what activities they like to do or by looking for a package deal without a specific destination in mind.

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

	Participated in an Extreme Air Sport	Did Not Participate in an Extreme Air Sport	Pleasure Travelers	Index
Size of Market	2,940,847	167,569,394	170,510,241	100
Summer				
Started with a desired destination in mind	56.4%	58.2%	58.2%	97
Started by considering specific activities wanted to do	12.9%	9.9%	9.9%	130
Started with a certain type of vacation experience in mind	16.8%	17.3%	17.3%	97
Looked for packaged deals - no destination in mind	2.4%	1.1%	1.1%	211
Considered something else first	4.7%	4.6%	4.6%	103
Don't know / Other	6.8%	8.9%	8.9%	77
Winter				
Started with a desired destination in mind	52.7%	59.1%	58.9%	89
Started by considering specific activities wanted to do	19.4%	11.1%	11.3%	172
Started with a certain type of vacation experience in mind	12.9%	14.8%	14.8%	87
Looked for packaged deals - no destination in mind	3.1%	1.4%	1.4%	215
Considered something else first	4.4%	5.4%	5.3%	83
Don't know / Other	7.6%	8.3%	8.3%	92

Trip Planning and Information Sources Consulted

Most of those who participated in an Extreme Air Sport on a trip are solely or partially responsible for planning vacation trips (61.3%). They consult a wide range of information sources when planning vacation travel. The most frequently consulted source for information is the Internet, however, past experience and the advice of family and friends are often taken into consideration as well. Relative to the average U.S. Pleasure Traveler, those who participated in an Extreme Air Sport while on a trip are much more likely to obtain vacation travel information from trade, travel and sports shows, television, newspaper / magazine articles and advertising, electronic newsletters, travel guide books (e.g., Fodor's), direct mail and travel agents.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Participated in an Extreme Air Sport	Did Not Participate in an Extreme Air Sport	Pleasure Travelers	Index
Size of Market		2,940,847	167,569,394	170,510,241	100
Who Plans Trips?	Respondent plans trips	42.7%	39.1%	39.2%	109
	Trip planning a shared responsibility	18.6%	17.6%	17.6%	105
	Someone else plans trips	38.7%	43.3%	43.2%	90
Information Sources Consulted	An Internet website	84.6%	75.8%	76.0%	111
	Past experience / Been there before	55.7%	54.5%	54.5%	102
	Advice of others / Word-of-mouth	54.0%	45.2%	45.4%	119
	Maps	40.0%	32.5%	32.7%	122
	Official travel guides or brochures from state / province	33.6%	20.3%	20.6%	163
	An auto club such as AAA	33.0%	23.8%	24.0%	137
	Articles in newspapers / magazines	32.8%	17.9%	18.1%	181
	A travel agent	32.6%	18.4%	18.6%	175
	Travel information received in the mail	28.5%	15.5%	15.8%	181
	Visitor information centres	28.5%	20.2%	20.4%	140
	Advertisements in newspapers / magazines	22.5%	10.7%	10.9%	207
	Travel guide books such as Fodor's	22.4%	11.8%	12.0%	187
	Programs on television	17.0%	7.0%	7.1%	239
	An electronic newsletter or magazine received by e-mail	12.9%	5.9%	6.0%	214
	Visits to trade, travel or sports shows	8.1%	2.3%	2.4%	333
Advertisements on television	7.5%	3.9%	4.0%	188	

Use of the Internet to Plan and Arrange Trips

The Internet is a very important vacation planning tool for those who participated in an Extreme Air Sport while on a trip. They are more likely than the average U.S. Pleasure Traveler to both plan trips (78.3%) and to book travel online (57.7%).

Most of those who participated in an Extreme Air Sport while on a trip use travel planning / booking sites such as Expedia, as well as hotel and airline sites. They are also much more likely than the average U.S. Pleasure Traveler to access the websites of cruise lines or motorcoach companies.

At least one-half of those who participated in an Extreme Air Sport while on a trip have booked airline tickets, accommodations and car rentals over the Internet. They were also much more likely than the average U.S. Pleasure Traveler to have used the Internet to purchase vacation packages, rail, bus or boat/ship fares and tickets for attractions.

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

		Participated in an Extreme Air Sport	Did Not Participate in an Extreme Air Sport	Pleasure Travelers	Index
	Size of Market	2,940,847	167,569,394	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	21.6%	31.1%	31.0%	70
	Uses Internet to plan trips only	20.6%	20.1%	20.1%	103
	Uses Internet to book part of trip	57.7%	48.8%	48.9%	118
Types of Websites Consulted	A travel planning / booking website	67.0%	55.4%	55.6%	120
	A website of a hotel or resort	60.5%	53.2%	53.3%	113
	An airline's website	59.6%	45.3%	45.6%	131
	A tourism website of a country / region / city	45.5%	34.9%	35.1%	130
	A website of an attraction	38.9%	33.3%	33.4%	117
	Some other website	29.6%	25.0%	25.1%	118
	A cruise line website	22.4%	12.2%	12.4%	180
	A motorcoach website	3.1%	1.3%	1.3%	231
Parts of Trips Booked Over The Internet	Air tickets	82.1%	70.3%	70.6%	116
	Accommodations	73.8%	71.8%	71.9%	103
	Car rental	49.7%	37.7%	38.0%	131
	Tickets or fees for specific activities or attractions	38.6%	26.1%	26.3%	146
	A package containing two or more items	32.2%	17.5%	17.8%	181
	Tickets for rail, bus or boat / ship fares	24.7%	11.6%	11.9%	208
	Other	3.1%	2.9%	2.9%	105

Media Consumption Habits

Those who participated in an Extreme Air Sport while on a trip are avid consumers of travel information. The majority read the newspaper travel sections and visit travel-related websites. They are also more likely than the average U.S. Pleasure Traveler to watch travel-related television programs and read travel-related magazines. In addition to their interest in travel, those who participated in an Extreme Air Sport while on a trip are more likely to read photography and video magazines, city or regional lifestyle magazines, and computer, electronics and technology magazines. While they most often listen to contemporary music, they are more likely than the average U.S. Pleasure Traveler to listen to multicultural, jazz, and classical music on the radio.

Fig. 18 Media Consumption Habits

		Participated in an Extreme Air Sport	Did Not Participate in an Extreme Air Sport	Pleasure Travelers	Index
	Size of Market	2,940,847	167,569,394	170,510,241	100
Newspaper Readership	Reads daily newspaper	63.9%	59.8%	59.9%	107
	Reads weekend edition of newspaper	56.9%	55.5%	55.5%	102
	Reads local neighbourhood or community newspapers	54.4%	49.5%	49.5%	110
	Reads other types of newspapers	21.7%	13.7%	13.9%	157
	Frequently or occasionally reads travel section of daily newspaper	58.3%	42.7%	43.0%	136
	Frequently or occasionally reads travel section of weekend newspaper	64.5%	49.0%	49.3%	131
Types of Magazines Read (Top 5 Indexed)	Photography and video	13.3%	3.7%	3.9%	340
	Travel (e.g., Condé Nast)	27.9%	10.3%	10.6%	262
	Magazines about your city	13.9%	6.8%	6.9%	201
	Regional magazines	13.6%	6.7%	6.8%	200
	Computers, electronics and technology	24.2%	12.2%	12.4%	196
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	46.6%	28.6%	28.9%	161
	Shopping channels	12.4%	7.6%	7.7%	161
	Biography	45.1%	32.7%	32.9%	137
	Late night talk shows	35.6%	26.9%	27.1%	131
	Music / Music video shows / channels	36.6%	27.9%	28.1%	130
Type of Radio Programs Listened To (Top 5 Indexed)	Multicultural	11.2%	4.6%	4.7%	237
	Jazz / Big band	19.0%	9.9%	10.0%	190
	Classical music	21.9%	14.0%	14.1%	155
	Modern rock / Alternative rock	46.4%	32.7%	32.9%	141
	All sports	16.2%	11.9%	11.9%	136
Types of Websites Visited (Top 5 Indexed)	Magazine sites	22.8%	14.7%	14.8%	154
	Travel	65.8%	47.6%	48.0%	137
	Sports	38.8%	29.8%	30.0%	129
	Newspaper sites	37.2%	29.5%	29.6%	126
	Entertainment	67.3%	53.5%	53.7%	125

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	
Exercsing & 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