

U.S. TRAVEL MARKET

**Hiking, Climbing and Paddling
While on Trips
Of One or More Nights**

A Profile Report

April 24, 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, 18.1% (40,009,742) of adult Americans went hiking, climbing or paddling (i.e., sameday hiking excursion, freshwater kayaking or canoeing, overnight hiking or backpacking in wilderness areas, white-water rafting, mountain climbing or trekking, rock climbing, wilderness skills course, ice climbing) while on an out-of-town overnight trip or one or more nights. A sameday hiking excursion was the most popular activity in this activity segment (13.3% of adult Americans). 35.1% (14,055,755) of Hikers, Climbers and Paddlers reported that these activities were the main reason for taking at least one trip in the past two years.

Hikers, Climbers and Paddlers tend to be male, 18 to 54 years of age, and married. Their household income and education levels are above-average. They are over-represented in Alaska and the Mountain, Pacific and New England regions of the United States, and are more likely to live in large cities with populations of 2 million or more.

Hikers, Climbers and Paddlers were more likely than the average U.S. Pleasure Traveler to take a trip to Canada in the past two years, and especially to Ontario, British Columbia and Quebec. Relative to the average U.S. Pleasure Traveler, they were also more likely to have taken a trip to Alberta.

A consistent theme in the vacation activities of Hikers, Climbers and Paddlers while on trips in the past two years was 'getting close to nature'. This segment was much more likely than the average U.S. Pleasure Traveler to pursue a full range of outdoor activities while on trips, and especially nature-oriented activities (e.g., wildlife viewing, cross-country skiing and snowshoeing, horseback riding). Similarly, they were more likely than average U.S. Pleasure Traveler to participate in culture and entertainment activities with a nature theme (e.g., archaeological sites and digs, aboriginal cultural experiences, garden theme attractions, agro-tourism). They were also more likely than average to stay in public campgrounds when on a trip, and to have taken tours and cruises.

Most Hikers, Campers and Paddlers use the Internet to plan their trips and the large majority (60.8%) book travel online. Relative to the average U.S. Pleasure Traveler, they are much more likely to obtain information from travel guide books, official government travel guides and visitor information centres. The most effective media for reaching this segment includes nature and science magazines and television programs and travel-related websites, magazines and television programs.

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 hiking, climbing or paddling 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.

Hiking, Climbing & Paddling While on Trips

Market Incidence

Over the last two years, 18.1% (40,009,742) of adult Americans went hiking, climbing or paddling while on an out-of-town, overnight trip of one or more nights. A sameday hiking excursion was the most popular activity (13.3%), followed by freshwater kayaking or canoeing (3.9%), hiking or backpacking in wilderness areas with overnight camping or lodging (3.3%), white-water rafting (2.3%), mountain climbing or trekking (2.1%) and rock climbing (1.5%). Relatively few adult Americans took wilderness skills courses (0.7%) or went ice climbing (0.1%) while on a trip in the past two years.

Of those who went hiking, climbing or paddling, 35.1% (14,055,755) reported that one of these activities was the main reason for taking at least one trip in the past two years. The majority of those who went wilderness hiking or backpacking for one or more nights (62.0%) reported this activity as the main reason for a trip. Between one-quarter and one-half of those who participated in other hiking, climbing or paddling activities reported that these activities were the main reason for a trip.

Fig. 1 Incidence of Hiking, Climbing & Paddling While on Trips¹

	Number of Hikers/Climbers/Paddlers ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total U.S. Population ⁵
Size of Market	40,009,742	14,055,755	170,510,241	222,846,268
Hiking, Climbing & Paddling (All Activities)	40,009,742	35.1%	23.5%	18.1%
Hiking - Same day excursion	29,504,764	24.0%	17.3%	13.3%
Freshwater kayaking / canoeing	8,520,835	32.3%	5.0%	3.9%
Hiking / Backpacking in wilderness with overnight camping / lodging	7,407,837	62.0%	4.3%	3.3%
White water rafting	5,067,027	48.3%	3.0%	2.3%
Mountain climbing / trekking	4,749,048	37.8%	2.8%	2.1%
Rock climbing	3,272,907	29.8%	1.9%	1.5%
Wilderness skills course	1,484,124	40.3%	0.9%	0.7%
Ice climbing	251,587	45.3%	0.1%	0.1%
Participated in all eight activities	16,911	0.0%	LT 0.1%	LT 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 - "Hikers/Climbers/Paddlers" are defined as individuals who went hiking, climbing or paddling 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 overnight trip during the past two years.
- 4 - "Pleasure Travelers" are defined as individuals who have taken at least one out-of-town, overnight pleasure trip of one or more nights in the last two years. This column reports the percent of Pleasure Travelers who participated in each activity on at least one trip during the last two years.
- 5 - This column reports the percent of the Total U.S. Adult Market who participated in each activity on a trip during the past two years.

Incidence by Region, State and Population Size

Hikers, Climbers and Paddlers tend to be over-represented relative to the average U.S. Pleasure Traveler in Alaska and the Mountain, Pacific and New England regions of the United States. They are more likely than average to live in large cities with populations of 2 million or more.

Fig. 2 Geographic Distribution and Population Size of Who Hiked, Climbed & Paddled While on Trips

	Total Population	Estimated Number Who Hiked/Climbed/Paddled on a Trip	Percent of Pleasure Travelers in Region Who Hiked/Climbed/Paddled on a Trip	Percent of Total Regional Population Who Hiked/Climbed/Paddled on a Trip
United States	222,846,268	40,009,742	23.5%	18.1%
New England	11,095,629	2,170,338	25.3%	19.6%
Middle Atlantic	31,005,526	4,645,634	20.2%	15.1%
East North Central	34,621,254	6,304,411	23.7%	18.3%
West North Central	15,024,360	2,759,282	22.9%	18.5%
South Atlantic	42,602,998	6,382,123	19.9%	15.1%
East South Central	13,597,436	2,016,663	21.1%	14.9%
West South Central	24,853,901	3,672,365	20.3%	14.9%
Mountain	15,030,720	3,750,724	30.9%	25.2%
Pacific	34,529,689	8,117,089	29.1%	23.6%
Alaska	484,754	191,114	45.3%	39.4%
Not Available	745,757	230,972	37.2%	31.0%
Less than 100,000	29,429,442	4,144,457	20.0%	14.2%
100,000 to 499,999	36,551,501	6,122,217	22.5%	16.8%
500,000 to 1,999,999	52,335,815	9,310,551	23.4%	17.9%
2,000,000 or more	103,783,753	20,201,546	24.6%	19.6%

Hikers, Climbers and Paddlers are most likely to live in Alaska, Utah, Colorado, Oregon, Washington and Idaho. They are least likely to be from North and South Dakota, Florida, Alabama and Louisiana (see Fig. 3 on next page).

Fig. 3 Those Who Hiked, Climbed & Paddled While on Trips by U.S. State

Region	State	Population of State	Estimated Hikers/Climbers/Paddlers	Percent of Pleasure Travelers in State	Percent of State Population
United States	All States	222,846,268	40,009,742	23.5%	18.1%
New England	Connecticut	2,685,692	484,573	23.5%	18.2%
	Maine	1,047,770	152,942	21.1%	14.6%
	Massachusetts	4,423,562	910,514	26.0%	20.6%
	New Hampshire	1,604,344	340,695	28.5%	21.2%
	Rhode Island	837,445	167,263	24.0%	20.0%
	Vermont	496,816	114,350	29.9%	23.0%
Middle Atlantic	New Jersey	6,708,501	1,055,494	20.3%	16.1%
	New York	14,727,054	2,174,105	19.8%	14.9%
	Pennsylvania	9,569,972	1,416,035	20.7%	14.9%
East North Central	Illinois	9,521,097	1,563,142	21.0%	16.6%
	Indiana	4,717,624	792,658	22.2%	16.8%
	Michigan	7,709,890	1,472,125	24.5%	19.3%
	Ohio	8,412,962	1,551,629	25.1%	18.5%
	Wisconsin	4,259,682	924,856	26.9%	21.7%
West North Central	Iowa	2,262,393	377,056	21.1%	16.7%
	Kansas	2,304,474	385,667	21.8%	16.7%
	Minnesota	3,946,220	891,561	26.4%	22.7%
	Missouri	4,138,758	710,957	22.2%	17.4%
	Nebraska	1,304,361	250,439	23.9%	19.2%
	North Dakota	488,140	75,116	18.3%	15.4%
	South Dakota	580,015	68,485	15.2%	12.4%
South Atlantic	Delaware	646,427	125,880	25.7%	19.5%
	District of Columbia	521,285	108,604	31.3%	20.8%
	Florida	13,937,467	1,865,822	17.4%	13.5%
	Georgia	6,668,302	1,071,811	21.0%	16.1%
	Maryland	3,428,206	560,667	21.0%	16.5%
	North Carolina	6,651,453	951,878	19.3%	14.4%
	South Carolina	3,241,944	471,450	19.9%	15.5%
	Virginia	5,957,159	1,045,208	22.8%	17.6%
	West Virginia	1,550,755	180,804	20.8%	11.7%
East South Central	Alabama	3,431,591	427,697	17.7%	12.5%
	Kentucky	3,447,277	563,962	23.2%	16.4%
	Mississippi	2,156,793	305,001	22.1%	14.1%
	Tennessee	4,561,775	720,003	21.7%	16.1%
West South Central	Arkansas	2,103,346	291,164	20.5%	14.2%
	Louisiana	3,367,908	428,847	19.0%	12.7%
	Oklahoma	2,643,565	396,648	21.0%	15.0%
	Texas	16,739,082	2,555,707	20.3%	15.4%
Mountain	Arizona	4,451,660	898,926	25.5%	20.2%
	Colorado	3,501,822	1,044,376	36.1%	30.0%
	Idaho	1,044,920	260,117	31.7%	24.9%
	Montana	726,027	152,228	25.3%	21.6%
	Nevada	1,809,582	396,801	27.4%	21.9%
	New Mexico	1,433,596	343,432	31.2%	24.5%
	Utah	1,671,322	578,625	41.3%	35.1%
	Wyoming	391,790	76,219	22.9%	20.0%
Pacific	Alaska	484,754	191,114	45.3%	39.4%
	California	26,965,837	6,210,577	28.3%	23.1%
	Oregon	2,793,303	695,478	32.2%	24.9%
	Washington	4,770,549	1,211,034	31.7%	25.6%

Travel Activity (During Last Two Years)

Hikers, Climbers and Paddlers were more likely than the average U.S. Pleasure Traveler to take a trip to other parts of the United States, Mexico, the Caribbean and overseas destinations.

They were also more likely than the average U.S. Pleasure Traveler to have taken a trip to Canada in the past two years (21.5% versus 14.6%). The most common destinations in Canada were Ontario (11.4%), British Columbia (7.4%) and Quebec (4.7%). In relative terms, (based on the Index), they were more likely than other U.S. Pleasure Travelers to have visited Alberta (Index=194), British Columbia (Index=178) and the Yukon (Index=167).

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

	Hikers/ Climbers/ Paddlers	Non-Hikers/ Climbers/ Paddlers	Pleasure Travelers	Index
Size of Market	40,009,742	130,500,499	170,510,241	100
All destinations	93.4%	83.0%	85.4%	109
Canada	21.5%	12.4%	14.6%	148
Newfoundland and Labrador	0.8%	0.3%	0.4%	190
Prince Edward Island	1.0%	0.5%	0.6%	156
New Brunswick	1.3%	0.7%	0.8%	165
Nova Scotia	2.1%	1.1%	1.3%	154
Quebec	4.7%	2.6%	3.1%	153
Ontario	11.4%	7.3%	8.3%	138
Manitoba	0.7%	0.5%	0.5%	128
Saskatchewan	0.7%	0.4%	0.5%	150
Alberta	2.3%	0.9%	1.2%	194
British Columbia	7.4%	3.1%	4.1%	178
Yukon	0.9%	0.5%	0.6%	167
Northwest Territories	0.4%	0.4%	0.4%	111
Nunavut	0.1%	< 0.1%	< 0.1%	133
Own State	89.1%	76.8%	79.7%	112
Other parts of the U.S.	94.3%	89.5%	90.6%	104
Mexico	19.0%	11.9%	13.6%	140
Caribbean	15.5%	11.9%	12.7%	122
All other destinations	14.0%	8.2%	9.6%	147

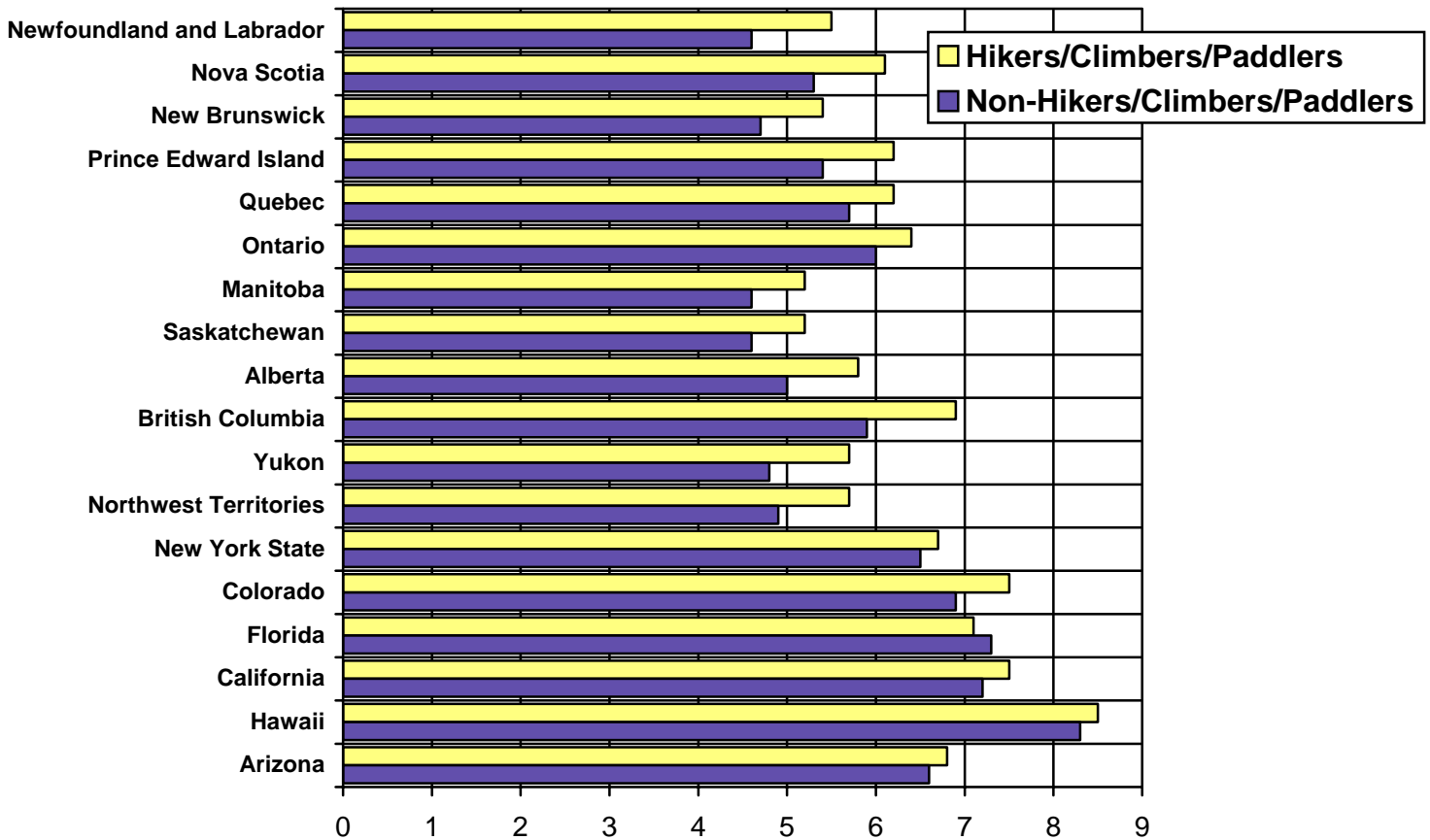
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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, Hikers, Climbers and Paddlers gave higher ratings than other U.S. Pleasure Travelers to the Canadian provinces and territories. British Columbia (6.9) was awarded the highest rating among the Canadian destinations, followed by Ontario (6.4), Quebec (6.2) and Prince Edward Island (6.2).

Hawaii (8.5) received the highest rating from Hikers, Climbers and Paddlers among the six U.S. reference states. British Columbia's rating of 6.9 surpassed those received by both New York State (6.7) and Arizona (6.8).

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

Hikers, Climbers and Paddlers participated in many other types of outdoor activities during their trips. Wildlife viewing was most popular among the other outdoor activities. Most Hikers, Climbers and Paddlers also pursued ocean-related activities, such as swimming and kayaking, while on a trip. They were much more likely than the average U. S. Pleasure Traveler to participate in all winter activities (e.g., cross-country skiing and snowshoeing, extreme skiing) and all summer activities (e.g., horseback riding, cycling, extreme air sports). These activity patterns indicate that Hikers, Climbers and Paddlers prefer activities that take place in nature.

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

	Hikers/ Climbers/ Paddlers	Non-Hikers/ Climbers/ Paddlers	Pleasure Travelers	Index
Size of Market	40,009,742	130,500,499	170,510,241	100
Wildlife Viewing	66.9%	25.1%	34.9%	192
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	58.3%	33.8%	39.6%	147
Boating & Swimming (e.g., motorboating, swimming in lakes)	40.5%	15.1%	21.0%	192
Games & Individual Sports (e.g., tennis, board games)	36.3%	17.9%	22.2%	163
Fishing	29.8%	14.9%	18.4%	162
Exercising & Jogging	28.2%	9.8%	14.1%	200
Cycling	17.4%	2.9%	6.3%	276
Downhill Skiing & Snowboarding	16.8%	5.4%	8.0%	209
Horseback Riding	14.5%	3.6%	6.2%	236
Golfing	14.0%	9.6%	10.7%	131
Snowmobiling & ATVing	13.3%	5.2%	7.1%	187
Team Sports (e.g., football, baseball, basketball)	12.7%	6.4%	7.9%	161
Sailing and Surfing (e.g., sailing, windsurfing, parasailing)	10.1%	3.1%	4.8%	213
Board and Blade (e.g., skateboarding, ice-skating)	9.1%	2.5%	4.0%	226
Scuba & Snorkelling	8.7%	2.7%	4.1%	213
Hunting	8.2%	4.5%	5.4%	152
Cross-country Skiing & Snowshoeing	5.7%	0.7%	1.9%	303
Motorcycling	4.9%	2.5%	3.1%	160
Extreme Air Sports (e.g., parachuting, bungee jumping)	3.8%	1.1%	1.7%	221
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	1.0%	0.1%	0.3%	293

Outdoor Activities Pursued While Not on Trips

The comparatively high level of outdoor activity while on trips among Hikers, Climbers and Paddlers 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, hike, garden at home and go picnicking. Relative to the average U.S. Pleasure Traveler, Hikers, Climbers and Paddlers are also more likely to go canoeing or kayaking, cross-country skiing, downhill skiing, snowboarding, cycling and camping when not on trips.

Fig. 8 Outdoor Activities Pursued While NOT on Trips

	Hikers/ Climbers/ Paddlers	Non-Hikers/ Climbers/ Paddlers	Pleasure Travelers	Index
Size of Market	40,009,742	130,500,499	170,510,241	100
Day outing to a park	76.4%	59.0%	63.1%	121
Swimming	66.2%	53.6%	56.5%	117
Exercising at home or at a fitness club	65.4%	53.2%	56.0%	117
Hiking	64.5%	22.7%	32.5%	199
Gardening	59.9%	51.0%	53.1%	113
Picnicking	57.3%	44.8%	47.7%	120
Camping	45.2%	21.0%	26.7%	169
Cycling	39.2%	17.9%	22.9%	172
Fishing	36.7%	31.5%	32.8%	112
Jogging	28.0%	16.9%	19.5%	144
Sailing or other boating	25.1%	18.4%	20.0%	126
Playing team sports	20.9%	14.2%	15.8%	132
Canoeing or kayaking	20.2%	4.1%	7.8%	257
Playing racquet sports (e.g., tennis or badminton)	19.9%	11.2%	13.2%	150
Golfing	19.3%	18.0%	18.3%	106
Riding an all-terrain vehicle (ATV)	13.7%	10.8%	11.5%	120
Hunting	13.1%	11.4%	11.8%	112
Horseback riding	12.9%	7.3%	8.6%	150
Rollerblading	11.0%	6.2%	7.3%	151
Downhill skiing	10.3%	4.3%	5.7%	181
Ice-skating	8.0%	4.7%	5.5%	145
Cross-country skiing	5.9%	1.5%	2.5%	235
Snowboarding	4.7%	2.1%	2.7%	173
Snowmobiling	4.7%	2.9%	3.3%	141
Skateboarding	3.3%	1.8%	2.2%	152

Culture and Entertainment Activities Pursued While on Trips

Relative to U.S. Pleasure Travelers overall, Hikers, Climbers and Paddlers were more likely to explore culture and entertainment activities with a nature or outdoor theme when on a trip (e.g., archaeological sites and digs, aboriginal cultural experiences, participatory historical activities, garden theme attractions, agro-tourism). They were also more likely than the average U.S. Pleasure Traveller to visit national and international sporting events, attend theatre, film and music festivals, and go to rock concerts and recreational dancing.

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

	Hikers/ Climbers/ Paddlers	Non-Hikers/ Climbers/ Paddlers	Pleasure Travelers	Index
Size of Market	40,009,742	130,500,499	222,846,268	100
Shopping and Dining	88.5%	74.4%	60.4%	147
Historical Sites, Museums & Art Galleries	74.2%	47.1%	40.9%	181
Theme Parks & Exhibits	62.6%	44.8%	37.8%	166
Fairs and Festivals	58.1%	35.7%	31.7%	183
Casino, Theatre and Comedy Clubs	53.8%	42.9%	35.1%	153
Fine Dining and Spas	43.6%	29.7%	25.5%	171
Science and Technology Exhibits	39.2%	20.4%	19.1%	205
Wine, Beer and Food Tastings	36.5%	18.8%	17.7%	206
Rock Concerts and Recreational Dancing	24.7%	12.3%	11.8%	210
Garden Theme Attractions	24.2%	10.4%	10.5%	230
Agro-Tourism	23.0%	10.6%	10.4%	221
Professional Sporting Events	22.5%	14.1%	12.5%	181
Equestrian & Western Events	21.7%	13.5%	12.0%	181
High Art Performances	18.3%	8.7%	8.5%	216
Aboriginal Cultural Experiences	17.9%	5.7%	6.6%	270
Theatre, Film & Musical Festivals	14.5%	6.4%	6.5%	225
Archaeological Digs & Sites	12.3%	3.4%	4.2%	290
Amateur Tournaments	11.8%	6.4%	5.9%	199
Participatory Historical Activities	8.6%	2.5%	3.0%	284
National & International Sporting Events	3.6%	1.3%	1.4%	250

Culture and Entertainment Activities Pursued While Not on Trips

Hikers, Climbers and Paddlers are more likely than the average U.S. Pleasure Traveler to visit botanical gardens, attend live music performances (e.g., classical music concerts, jazz clubs, rock concerts) and visit art galleries and museums when not on trips. They are somewhat less likely than average to gamble in casinos.

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

	Hikers/ Climbers/ Paddlers	Non-Hikers/ Climbers/ Paddlers	Pleasure Travelers	Index
Size of Market	40,009,742	130,500,499	170,510,241	100
Going out to eat in restaurants	94.3%	92.4%	92.8%	102
Going to festivals or fairs	70.2%	64.0%	65.5%	107
Going to zoos or aquariums	52.0%	43.7%	45.6%	114
Going to historic sites or heritage buildings	48.8%	37.5%	40.1%	122
Going to museums	47.4%	34.5%	37.5%	126
Going to amateur sporting events	45.3%	38.2%	39.9%	114
Going to amusement or theme parks	40.1%	37.5%	38.1%	105
Going to professional sporting events	38.1%	33.9%	34.9%	109
Going to art galleries or art shows	37.5%	24.8%	27.8%	135
Going to pick-your-own farms or farmers' market	37.0%	29.9%	31.6%	117
Going to live theatre	33.9%	27.7%	29.2%	116
Going to bars with live pop or rock bands	29.1%	21.9%	23.6%	124
Going to rock music concerts	27.2%	19.5%	21.3%	128
Going to botanical gardens	26.8%	17.9%	20.0%	134
Going dancing	23.5%	20.0%	20.8%	113
Going to gamble in casinos	23.3%	29.5%	28.0%	83
Going to classical music concerts	19.8%	13.4%	14.9%	133
Going to day spas	12.3%	9.7%	10.3%	120
Staying overnight in a hotel or B&B in own city	11.1%	10.4%	10.6%	105
Going to jazz clubs	10.2%	7.2%	7.9%	129
Going to rodeos	9.9%	7.7%	8.2%	120
Going to the ballet	9.0%	6.4%	7.0%	128
Going to the opera	7.4%	5.2%	5.7%	129

Accommodations Stayed In While on Trips

A public campground was the most common type of accommodation used by Hikers, Climbers and Paddlers while on trips in the past two years. Hikers, Climbers and Paddlers were more likely than the average U.S. Pleasure Traveler to camp in other settings (a private campground, a campsite in a wilderness setting), and stay at wilderness lodges or outposts (including those accessible by car and those that are remote or fly-in).

Fig. 11 Accommodations Stayed In While on Trips

	Hikers/ Climbers/ Paddlers	Non-Hikers/ Climbers/ Paddlers	Pleasure Travelers	Index
Size of Market	40,009,742	130,500,499	170,510,241	100
A Public Campground in a National, State, Provincial or Municipal Park	48.4%	27.3%	34.8%	139
Seaside Resort	36.2%	38.5%	37.7%	96
Lakeside / Riverside Resort	28.8%	23.8%	25.6%	113
A Private Campground	26.3%	18.0%	20.9%	126
Ski Resort or Mountain Resort	24.4%	15.1%	18.4%	132
A Camp Site in a Wilderness Setting (Not a Campground)	16.5%	5.8%	9.6%	172
Wilderness Lodge You Can Drive to by Car	11.6%	4.7%	7.2%	161
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	9.1%	8.5%	8.7%	104
Health Spa	7.5%	5.9%	6.5%	116
Farm or Guest Ranch	5.1%	3.5%	4.1%	125
Country Inn or Resort with Gourmet Restaurant	5.0%	3.6%	4.1%	122
On a Houseboat	4.1%	2.3%	2.9%	140
Remote or Fly-In Wilderness Lodge	2.7%	1.1%	1.7%	158
Remote or Fly-In Wilderness Outpost	1.8%	0.4%	0.9%	193
Cooking School	1.6%	1.0%	1.2%	133
Wine Tasting School	1.3%	0.6%	0.9%	148

Tours and Cruises Taken During Past Two Years

During the past two years, Hikers, Climbers and Paddlers were more likely than the average U.S. Pleasure Traveler to have taken tours and cruises while on trips. They were especially likely to have taken wilderness tours, self-guided tours (both sameday and overnight tours), tours around a city, scenic drives in the country, and air tours by airplane or helicopter. This segment was also more likely than the average U.S.

Pleasure Traveler to take sightseeing cruises in general, and especially Great Lakes or submarine cruises.

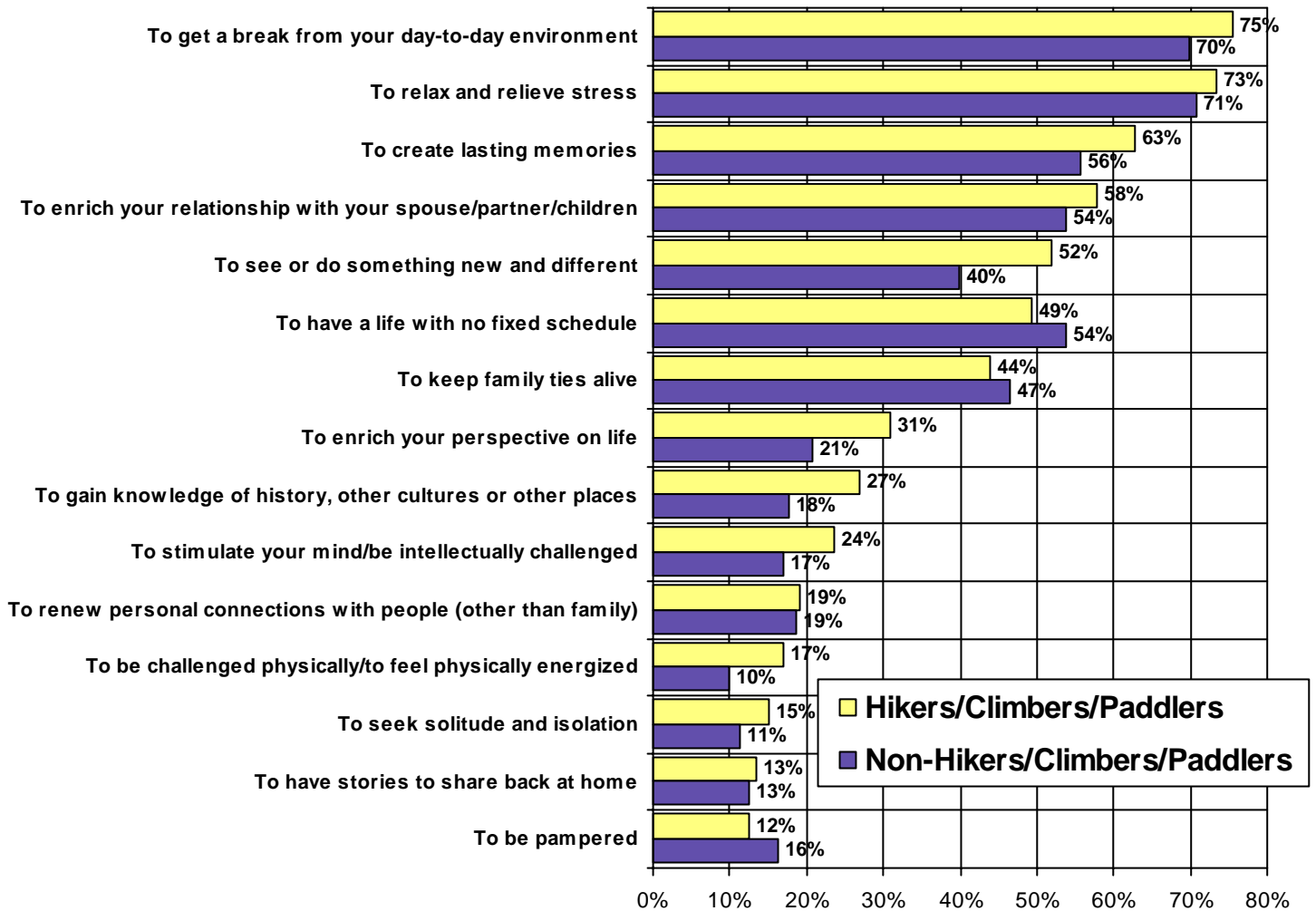
Fig. 12 Tours and Cruises Taken During Past Two Years

	Hikers/ Climbers/ Paddlers	Non-Hikers/ Climbers/ Paddlers	Pleasure Travelers	Index
Size of Market	40,009,742	130,500,499	170,510,241	100
A self-guided sameday tour while on an overnight trip	32.1%	15.2%	19.2%	167
An organized sameday guided tour while on an overnight trip	26.2%	16.2%	18.5%	142
Around the city	22.9%	13.6%	15.8%	145
Around the country side - scenic drives	22.7%	10.2%	13.1%	173
A self-guided overnight tour where you stayed in different locations	18.7%	7.8%	10.4%	180
Wilderness tour	18.0%	4.2%	7.4%	242
On the water (sightseeing cruise)	12.6%	6.3%	7.8%	162
Some other type of tour	12.6%	7.7%	8.8%	142
An organized overnight guided tour where you stayed in different locations	11.5%	6.8%	7.9%	146
Caribbean ocean cruise	10.3%	8.6%	9.0%	114
An organized overnight guided tour where you stayed in a single location	8.6%	6.1%	6.7%	128
To a winery	6.7%	2.6%	3.6%	187
To a casino	6.6%	4.4%	4.9%	136
Ocean cruise - Other	6.2%	4.4%	4.8%	129
Alaskan ocean cruise	3.7%	2.1%	2.5%	149
To a factory	3.3%	1.4%	1.8%	179
Cruise on another lake or river	3.1%	1.6%	2.0%	158
In the air as a pilot or passenger of an airplane or helicopter	2.9%	1.0%	1.4%	206
Some other type of cruise	2.6%	1.4%	1.7%	153
Great Lakes cruise	0.8%	0.3%	0.4%	202
Submarine cruise	0.5%	0.2%	0.2%	195
Cruise on the St. Lawrence River	0.4%	0.3%	0.3%	135

Benefits Sought While on Vacation

The majority of Hikers, Climbers and Paddlers feel it is highly important that their vacations provide a break from their day-to-day environment, provide relaxation and relief from stress, create lasting memories, enrich family relationships, and offer opportunities to see or do something new or different. This segment places more importance than other U.S. Pleasure Travelers on taking vacations that are physically challenging, energizing and intellectually stimulating (e.g., enriching their perspective on life, gaining knowledge of the history and culture of other destinations).

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

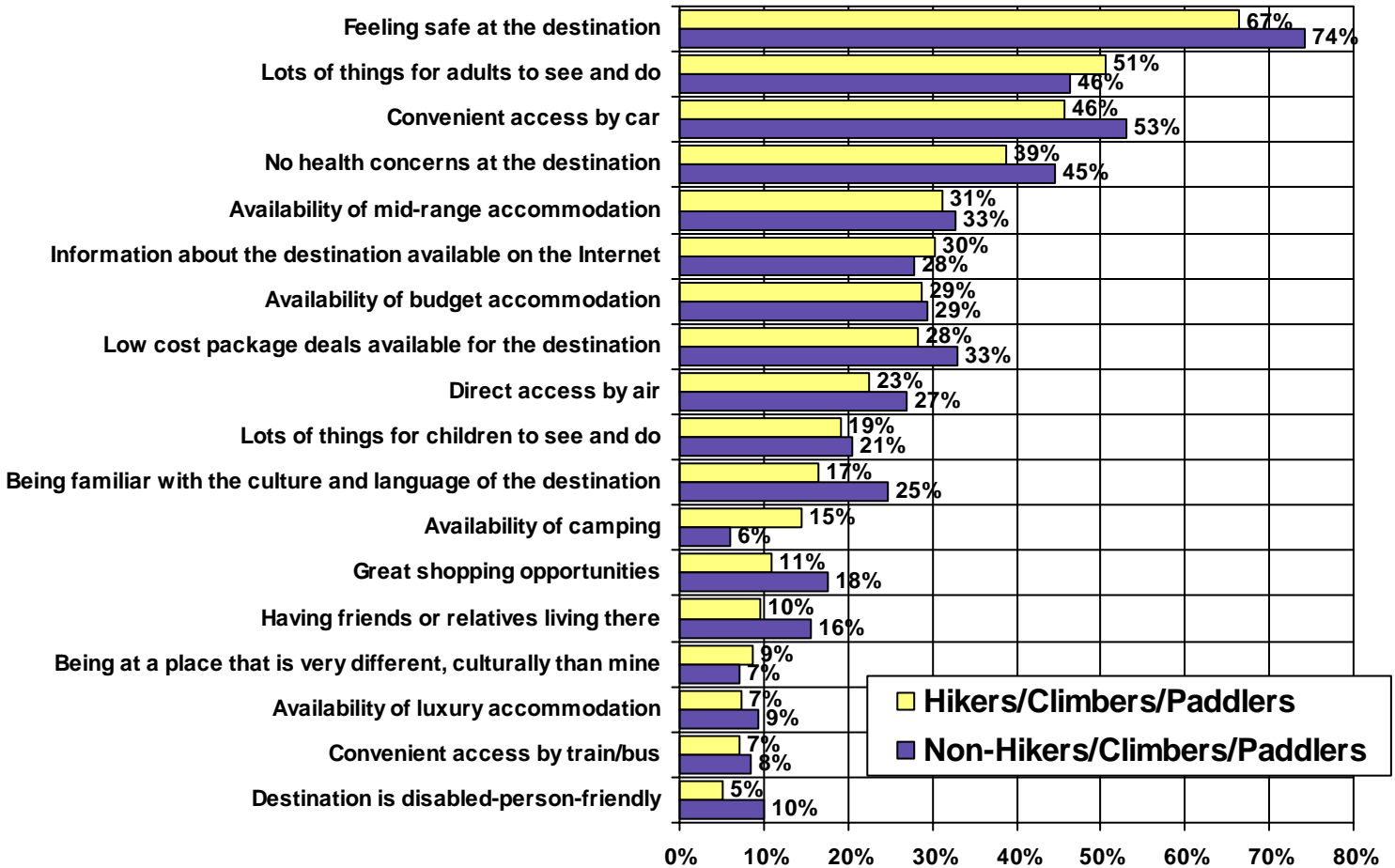


Other Attributes of a Destination Considered Important

Most Hikers, Climbers and Paddlers consider it important that they feel safe at a destination and that there are lots of things for adults to see and do. Among the other destination attributes, the availability of camping is more important to this activity segment than for the average U.S. Pleasure Traveler.

Relative to the average U.S. Pleasure Traveler, Hikers, Climbers and Paddlers are less likely to consider it highly important that a destination offers convenient access by car, poses no health concerns, has low-cost package deals, has a familiar culture and language, has great shopping opportunities, has friends or relatives living close-by, and is disabled-person-friendly.

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 U.S. Pleasure Travelers overall, the majority of Hikers, Climbers and Paddlers start with a particular destination in mind. However, this segment is more likely than the average U.S. Pleasure Traveler to start their vacation planning by considering the specific activities they would like to do on their trip.

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

	Hikers/ Climbers/ Paddlers	Non-Hikers/ Climbers/ Paddlers	Pleasure Travelers	Index
Size of Market	40,009,742	130,500,499	170,510,241	100
Summer				
Started with a desired destination in mind	58.7%	58.0%	58.2%	101
Started by considering specific activities wanted to do	11.6%	9.3%	9.9%	117
Started with a certain type of vacation experience in mind	18.1%	17.0%	17.3%	104
Looked for packaged deals - no destination in mind	1.2%	1.1%	1.1%	108
Considered something else first	3.7%	4.9%	4.6%	80
Don't know / Other	6.8%	9.6%	8.9%	76
Winter				
Started with a desired destination in mind	58.2%	59.2%	58.9%	99
Started by considering specific activities wanted to do	15.4%	9.7%	11.3%	137
Started with a certain type of vacation experience in mind	15.3%	14.6%	14.8%	104
Looked for packaged deals - no destination in mind	1.5%	1.4%	1.4%	106
Considered something else first	4.0%	5.9%	5.3%	75
Don't know / Other	5.6%	9.3%	8.3%	68

Trip Planning and Information Sources Consulted

The majority of Hikers, Climbers and Paddlers (57.5%) participate in planning their vacations. Most Hikers, Climbers and Paddlers use the Internet, past experience and the advice of family and friends as sources of vacation information. Relative to the average U.S. Pleasure Traveler, they are much more likely to obtain trip planning information from travel guide books (e.g., Fodor's), official travel guides or brochures from a state or province, visitor information centres, trade, travel and sports shows, television programs, and articles in newspapers or magazines.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Hikers/ Climbers/ Paddlers	Non-Hikers/ Climbers/ Paddlers	Pleasure Travelers	Index
Size of Market		40,009,742	130,500,499	170,510,241	100
Who Plans Trips?	Respondent plans trips	40.2%	38.9%	39.2%	103
	Trip planning a shared responsibility	17.3%	17.7%	17.6%	98
	Someone else plans trips	42.5%	43.5%	43.2%	98
Information Sources Consulted	An Internet website	85.7%	72.8%	76.0%	113
	Past experience / Been there before	62.9%	51.7%	54.5%	115
	Advice of others / Word-of-mouth	56.9%	41.6%	45.4%	125
	Maps	45.6%	28.4%	32.7%	140
	Official travel guides or brochures from state/province	34.1%	16.1%	20.6%	166
	Visitor information centres	31.8%	16.6%	20.4%	156
	An auto club such as AAA	30.4%	21.9%	24.0%	127
	Articles in newspapers/magazines	27.7%	15.0%	18.1%	152
	A travel agent	21.8%	17.6%	18.6%	117
	Travel information received in the mail	21.3%	13.9%	15.8%	135
	Travel guide books such as Fodor's	21.1%	9.0%	12.0%	176
	Advertisements in newspapers / magazines	13.8%	9.9%	10.9%	126
	Programs on television	11.1%	5.8%	7.1%	156
	An electronic newsletter or magazine received by e-mail	9.1%	5.0%	6.0%	151
	Advertisements on television	4.6%	3.8%	4.0%	115
Visits to trade, travel or sports shows	3.8%	2.0%	2.4%	156	

Use of the Internet to Plan and Arrange Trips

The Internet is an important vacation planning and booking tool for Hikers, Climbers and Paddlers. 81.2% have used the Internet to plan trips, and 60.8% have purchased at least part of a trip over the Internet in the past two years. The majority of Hikers, Climbers and Paddlers have consulted travel planning / booking sites (e.g. Expedia), hotel or resort sites, and airline sites. They were also more likely than the average U.S. Pleasure Traveler to consult the tourism website for a specific country, region or city. Most Hikers, Climbers and Paddlers have purchased accommodation and airline tickets over the Internet. They were also more likely than the average U.S. Pleasure Traveler to have booked vacation packages and other trip components (e.g., rail, bus or boat / ship fares, tickets for specific activities or attractions) over the Internet.

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

		Hikers/ Climbers/ Paddlers	Non-Hikers/ Climbers/ Paddlers	Pleasure Travelers	Index
	Size of Market	40,009,742	130,500,499	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	18.8%	34.7%	31.0%	61
	Uses Internet to plan trips only	20.4%	20.0%	20.1%	102
	Uses Internet to book part of trip	60.8%	45.3%	48.9%	124
Types of Websites Consulted	A travel planning/booking website	61.5%	53.3%	55.6%	111
	A website of a hotel or resort	57.9%	51.5%	53.3%	109
	An airline's website	51.0%	43.5%	45.6%	112
	A tourism website of a country / region / city	46.9%	30.6%	35.1%	133
	A website of an attraction	42.8%	29.7%	33.4%	128
	Some other website	31.4%	22.6%	25.1%	125
	A cruise line website	14.7%	11.5%	12.4%	119
	A motorcoach website	1.9%	1.1%	1.3%	140
Parts of Trips Booked Over The Internet	Accommodations	77.6%	69.5%	71.9%	108
	Air tickets	75.2%	68.7%	70.6%	107
	Car rental	45.3%	34.9%	38.0%	119
	Tickets or fees for specific activities or attractions	32.5%	23.8%	26.3%	123
	A package containing two or more items	21.9%	16.1%	17.8%	123
	Tickets for rail, bus or boat / ship fares	16.0%	10.2%	11.9%	135
	Other	3.8%	2.6%	2.9%	130

Media Consumption Habits

Relative to the average U.S. Pleasure Traveler, Hikers, Climbers and Paddlers are more likely to read travel magazines, visit travel websites and watch travel shows on television. Hikers, Climbers and Paddlers exhibit an above-average interest in nature and science television programming and magazines.

Fig. 18 Media Consumption Habits

		Hikers/ Climbers/ Paddlers	Non-Hikers/ Climbers/ Paddlers	Pleasure Travelers	Index
	Size of Market	40,009,742	130,500,499	170,510,241	100
Newspaper Readership	Reads daily newspaper	57.3%	60.7%	59.9%	96
	Reads weekend edition of newspaper	56.1%	55.4%	55.5%	101
	Reads local neighbourhood or community newspapers	50.1%	49.4%	49.5%	101
	Reads other types of newspapers	15.6%	13.3%	13.9%	113
	Frequently or occasionally reads travel section of daily newspaper	44.5%	42.5%	43.0%	104
	Frequently or occasionally reads travel section of weekend newspaper	53.1%	48.2%	49.3%	108
Types of Magazines Read (Top 5 Indexed)	Outdoor activities / sports	16.5%	8.9%	10.7%	154
	Science and geography	21.5%	11.8%	14.0%	153
	Photography and video	5.8%	3.3%	3.9%	150
	Travel (e.g., Condé Nast)	15.1%	9.3%	10.6%	142
	Business, finance and investing	18.1%	12.7%	14.0%	129
Type of Television Programs Watched (Top 5 Indexed)	Science & nature shows	45.2%	34.2%	36.8%	123
	Travel shows	33.2%	27.6%	28.9%	115
	Science fiction / Fantasy shows	27.3%	22.9%	24.0%	114
	History	47.5%	44.2%	45.0%	106
	Home & garden shows	33.6%	32.0%	32.4%	104
Type of Radio Programs Listened To (Top 5 Indexed)	Classical music	18.5%	12.8%	14.1%	131
	Modern rock / Alternative rock	42.0%	30.1%	32.9%	128
	Multicultural	6.0%	4.3%	4.7%	127
	News / Talk / Information	38.8%	30.5%	32.4%	120
	Jazz / Big band	12.0%	9.4%	10.0%	120
Types of Websites Visited (Top 5 Indexed)	Sites for specific activities or interests	40.5%	29.8%	32.5%	124
	Travel	57.0%	44.9%	48.0%	119
	Network news sites (e.g., CNN)	44.6%	36.6%	38.7%	115
	Magazine sites	16.7%	14.1%	14.8%	113
	Newspaper sites	33.3%	28.3%	29.6%	113

Appendix One: U.S. TAMS 2006 Outdoor Activity Segmentation		
Activity Segment	Activities in Segment	
Golfing	Played During a Stay at a Golf Resort with Overnight Stay	Golf Tour Package to Play on Various Courses
	Played an Occasional Game While on a Trip	
Hunting	Hunting for Small Game	Hunting for Birds
	Hunting for Big Game	
Fishing	Fresh Water Fishing	Salt Water Fishing
	Ice Fishing	Trophy Fishing
Wildlife Viewing	Viewing Land Based Animals	Bird Watching
	Whale Watching & Other Marine Life	Visited National, Provincial /State Park
	Wildflowers /Flora Viewing	Viewing Northern Lights
Hiking, Climbing & Paddling	Mountain Climbing /Trekking	Fresh Water Kayaking /Canoeing
	Rock Climbing	White Water Rafting
	Hiking /Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
	Ice Climbing	Wilderness Skills Courses
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkelling in Sea /Ocean
	Sunbathing, Sitting on a Beach	Ocean Kayaking or Canoeing
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Scuba & Snorkelling	Scuba Diving in Lakes /Rivers	Scuba Diving in Sea /Ocean
	Snorkelling in Lakes /Rivers	
Exercising & Jogging	Working Out in Fitness Centre	Jogging or Exercising Outdoors
Cycling	Overnight Touring Trip	Recreational - Same Day Excursion
	Mountain Biking	
Motorcycling	Overnight Touring Trip	Same Day Excursion
Horseback Riding	With an Overnight Stop	Same Day Excursion
Snowmobiling & ATVing	All Terrain Vehicle - Overnight Touring Trip	Snowmobiling As an Overnight Touring Trip
	All Terrain Vehicle - Same Day Excursion	Snowmobiling Day Use on Organized Trail
Downhill Skiing & Snowboarding	Snowboarding	Downhill Skiing
Cross-country Skiing & Snowshoeing	Cross-country Skiing	Snowshoeing
Extreme Skiing	Heli-Skiing	Cross Country or Back Country as an Overnight Touring Trip
	Ski Jouring	
Hockey, Skating, Rollerblading & Skateboarding	Ice-Hockey	In-Line /Rollerblading
	Ice-Skating	Skateboarding
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	Bungee Jumping
Team Sports	Football	Basketball
	Baseball or Softball	Soccer
Games & Individual Sports	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	

Appendix Two U.S. TAMS 2006 Culture and Entertainment Segmentation		
Activity Segment	Activities in Segment	
Historical Sites, Museums & Art Galleries	Well-known Historic Sites or Buildings	Well-known Natural Wonders
	Other Historic Sites, Monuments and Buildings	Historical Replicas of Cities or Towns With Historic Re-Enactments
	Strolling Around a City to Observe Buildings and Architecture	Museum - Military /War Museums
	Museum - General History or Heritage Museums	Art Galleries
Shopping & Dining	Shop Or Browse - Bookstore or Music Store	Shop Or Browse - Antiques
	Shop Or Browse - Clothing, Shoes and Jewellery	Shop Or Browse - Gourmet Foods in Retail Stores
	Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	Shop Or Browse - Greenhouse or Garden Centre
	Dining - Restaurants Offering Local Ingredients and Recipes	Went to Local Outdoor Cafes
Aboriginal Cultural Experiences	Aboriginal Cuisine (Tasted or Sampled)	Aboriginal Arts and Crafts Shows
	Aboriginal Heritage Attractions (e.g., Museums, Interpretive Centres)	Aboriginal Cultural Experiences in a Remote or Rural Setting
	Aboriginal Festivals & Events (e.g., Powwows)	Aboriginal Outdoor Adventure and /or Sports
Fairs & Festivals	Farmers' Markets or Country Fairs	Firework Displays
	Carnivals	Ethnic Festivals
	Exhibition or Fairs	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Food/Drink Festivals	Circus
Science & Technology Exhibits	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
Theme Parks & Exhibits	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Wax Museums
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	Jazz Concert
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	
Theatre, Film & Musical Festivals	Theatre Festivals	International Film Festivals
	Comedy Festivals	Music Festivals
	Literary Festivals or Events	
Tastings	Went to Wineries for Day Visits and Tasting	Cooking/Wine Tasting Courses
	Went to Breweries for Day Visits and Tasting	Visited Food Processing Plants (e.g., Cheese Factory)
Casino, Theatre & Comedy Clubs	Stand-Up Comedy Clubs and Other Variety Shows	Live Theatre with Dinner
	Went to a Casino	Live Theatre
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National/Provincial Park
	Curatorial Tours	
National & International Sporting Events	National/International Sporting Events such as the Olympic Games	Curling Bonspiel
	Professional Figure Skating	Professional Soccer Games

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