

U.S. TRAVEL MARKET

**Scuba Diving and Snorkeling While on Trips
Of One or More Nights**

A Profile Report

May 14, 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, travel behaviour of one or more nights over the past two years and provides detailed information on Travelers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

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

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

TAMS was sponsored by the following organizations:

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

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

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

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

Scuba Diving and Snorkeling While on Trips

Market Incidence

Over the last two years, 3.1% (6,938,725) of adult Americans went scuba diving and snorkeling while on an out-of-town, overnight trip of one or more nights. Salt-water Scuba diving was the most popular activity (2.4%), followed by snorkeling in a lake or river (0.9%) and fresh-water scuba diving in a lake or river (0.4%). Only 0.1% of adult Americans participated in all three activities while on trips in the past two years.

33.8% of those who went scuba diving or snorkeling while on trips (2,348,388 adult Americans) reported that this activity was the main reason for taking at least one trip in the past two years. Scuba diving in a lake or river (44.5%) or in the ocean (36.3%) were more likely than snorkeling in a lake or river (20.6%) to have been the main reason for taking a trip.

Fig. 1 Incidence of Scuba Diving and Snorkeling While on Trips¹

	Number of Scuba & Snorkelers ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total U.S. Population ⁵
Size of Market	6,938,725	2,348,388	170,510,241	222,846,268
Scuba & Snorkeling (All Activities)	6,938,725	33.8%	4.1%	3.1%
Scuba diving in sea/ocean	5,220,020	36.3%	3.1%	2.4%
Snorkeling in lake/river	1,885,005	20.6%	1.1%	0.9%
Scuba diving in lake/river	911,065	44.5%	0.5%	0.4%
Participated in all three activities	179,770	28.4%	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 - "Scuba & Snorkelers" are defined as individuals who participated in scuba diving or snorkeling activities while on an out-of-town, overnight trip of one or more nights during the past two years and who took at least one out-of-town pleasure trip of one or more nights during the past two years. This column reports the number of individuals who participated in the activity on at least one trip during the last two years.
- 3 - This column reports the percent who participated in each activity who stated that the activity was the main reason for taking at least one trip during the past two years.
- 4 - "Pleasure Travelers" are defined as individuals who have taken at least one out-of-town pleasure trip of one or more nights in the last two years. This column reports the percent of Pleasure Travelers who participated in each activity on at least one trip during the last two years.
- 5 - This column reports the percent of the Total U.S. Adult Market who participated in each activity on a trip during the past two years.

Incidence by Region, State and Population Size

Scuba Divers and Snorkelers tend to be over-represented relative to the average U.S. Pleasure Traveler among those living in Alaska and the Pacific and New England regions of the United States. They are more likely to live in large cities (population 2 million or more) than in smaller communities.

Fig. 2 Geographic Distribution & Population Size of Those Who Went Scuba Diving and Snorkeling While on Trips

	Total Population	Estimated Number Who Went Scuba or Snorkeling on a Trip	Percent of Pleasure Travelers in Region Scuba or Snorkeling on a Trip	Percent of Total Regional Population Scuba or Snorkeling on a Trip
United States	222,846,268	6,938,725	4.1%	3.1%
New England	11,095,629	386,912	4.5%	3.5%
Middle Atlantic	31,005,526	920,682	4.0%	3.0%
East North Central	34,621,254	1,024,579	3.8%	3.0%
West North Central	15,024,360	387,274	3.2%	2.6%
South Atlantic	42,602,998	1,298,340	4.0%	3.1%
East South Central	13,597,436	312,926	3.3%	2.3%
West South Central	24,853,901	739,979	4.1%	3.0%
Mountain	15,030,720	494,636	4.1%	3.3%
Pacific	34,529,689	1,341,648	4.8%	3.9%
Alaska	484,754	31,748	7.5%	6.5%
Not Available	745,757	41,566	6.7%	5.6%
Less than 100,000	29,429,442	543,744	2.6%	1.9%
100,000 to 499,999	36,551,501	835,816	3.1%	2.3%
500,000 to 1,999,999	52,335,815	1,351,903	3.4%	2.6%
2,000,000 or more	103,783,753	4,165,696	5.1%	4.0%

Scuba Divers and Snorkelers are most likely to live in Alaska, Colorado, New Hampshire, District of Columbia and Delaware. They are least likely to live in West Virginia, Nevada, Wyoming, South Dakota and Idaho (see Fig. 3 on next page).

Fig. 3 Those Who Went Scuba Diving and Snorkeling While on Trips by U.S. State

Region	State	Population of State	Estimated Number of Scuba/Snorkel	Percent of Pleasure Travelers in State	Percent of State Population
United States	All States	222,846,268	6,938,725	4.1%	3.1%
New England	Connecticut	2,685,692	103,553	5.0%	3.9%
	Maine	1,047,770	25,150	3.5%	2.4%
	Massachusetts	4,423,562	139,295	4.0%	3.1%
	New Hampshire	1,604,344	75,316	6.3%	4.7%
	Rhode Island	837,445	25,027	3.6%	3.0%
	Vermont	496,816	18,572	4.9%	3.7%
Middle Atlantic	New Jersey	6,708,501	229,651	4.4%	3.4%
	New York	14,727,054	491,299	4.5%	3.4%
	Pennsylvania	9,569,972	199,733	2.9%	2.1%
East North Central	Illinois	9,521,097	431,701	5.8%	4.6%
	Indiana	4,717,624	94,398	2.6%	2.0%
	Michigan	7,709,890	199,549	3.3%	2.7%
	Ohio	8,412,962	210,351	3.4%	2.5%
	Wisconsin	4,259,682	88,580	2.6%	2.1%
West North Central	Iowa	2,262,393	45,013	2.5%	2.0%
	Kansas	2,304,474	38,861	2.2%	1.7%
	Minnesota	3,946,220	132,553	3.9%	3.4%
	Missouri	4,138,758	112,895	3.5%	2.7%
	Nebraska	1,304,361	32,664	3.1%	2.5%
	North Dakota	488,140	18,998	4.6%	3.9%
	South Dakota	580,015	6,290	1.4%	1.1%
South Atlantic	Delaware	646,427	30,095	6.2%	4.7%
	District of Columbia	521,285	21,833	6.3%	4.2%
	Florida	13,937,467	565,449	5.3%	4.1%
	Georgia	6,668,302	223,044	4.4%	3.4%
	Maryland	3,428,206	116,129	4.4%	3.4%
	North Carolina	6,651,453	95,537	1.9%	1.5%
	South Carolina	3,241,944	56,117	2.4%	1.7%
	Virginia	5,957,159	180,797	3.9%	3.0%
	West Virginia	1,550,755	9,339	1.1%	0.6%
East South Central	Alabama	3,431,591	87,052	3.6%	2.5%
	Kentucky	3,447,277	51,026	2.1%	1.5%
	Mississippi	2,156,793	44,915	3.2%	2.1%
	Tennessee	4,561,775	129,933	3.9%	2.8%
West South Central	Arkansas	2,103,346	34,641	2.4%	1.6%
	Louisiana	3,367,908	97,289	4.3%	2.9%
	Oklahoma	2,643,565	91,375	4.8%	3.5%
	Texas	16,739,082	516,674	4.1%	3.1%
Mountain	Arizona	4,451,660	157,281	4.5%	3.5%
	Colorado	3,501,822	197,757	6.8%	5.6%
	Idaho	1,044,920	14,769	1.8%	1.4%
	Montana	726,027	11,189	1.9%	2.1%
	Nevada	1,809,582	17,677	1.2%	1.0%
	New Mexico	1,433,596	29,834	2.7%	2.1%
	Utah	1,671,322	61,834	4.4%	3.8%
	Wyoming	391,790	4,295	1.3%	1.1%
Pacific	Alaska	484,754	31,748	7.5%	6.5%
	California	26,965,837	1,107,449	5.0%	4.1%
	Oregon	2,793,303	50,944	2.4%	1.8%
	Washington	4,770,549	183,254	4.8%	3.8%

Demographic Profile

The majority of Scuba Divers and Snorkelers are males, 18 to 44 years of age and married with no dependent children under 18 years of age living at home. They are among the most affluent of the U.S. activity segments with high household incomes (\$102,032) and levels of education (73.1% have a university degree and 25.3% have a post-graduate degree).

Fig. 4 Demographic Profile of Scuba Divers & Snorkelers Relative to All U.S. Pleasure Travelers

Attribute	Size of Market	Scuba & Snorkelers	Non-Scuba & Snorkelers ¹	Pleasure Travelers	Index ²
		6,938,725	163,571,516	170,510,241	100
Gender	Male	57.9%	48.1%	48.5%	119
	Female	42.1%	51.9%	51.5%	82
Age of Respondent	18 to 24	13.7%	10.7%	10.8%	126
	25 to 34	27.6%	20.7%	21.0%	132
	35 to 44	19.8%	17.2%	17.3%	114
	45 to 54	22.0%	21.0%	21.0%	104
	55 to 64	11.8%	15.6%	15.5%	76
	65 Plus	5.2%	14.8%	14.4%	36
Average Age		40.3	45.7	45.4	N/A
Marital Status	Not married	30.0%	30.6%	30.5%	98
	Married	70.0%	69.4%	69.5%	101
Parental Status	No children under 18	70.5%	70.0%	70.0%	101
	Children under 18	29.5%	30.0%	30.0%	98
Education	High school or less	10.7%	20.9%	20.5%	52
	Trade, Technical, Community Col.	16.2%	21.6%	21.4%	76
	University Degree	47.8%	40.8%	41.1%	116
	Post Graduate Degree	25.3%	16.7%	17.1%	148
Household Income	Under \$20,000	3.0%	8.3%	8.1%	37
	\$20,000 to \$39,999	8.9%	16.5%	16.2%	55
	\$40,000 to \$59,999	11.4%	16.9%	16.7%	68
	\$60,000 to \$79,999	14.6%	14.7%	14.7%	100
	\$80,000 to \$99,999	12.2%	11.6%	11.6%	105
	\$100,000 to \$149,999	20.2%	14.1%	14.4%	140
	\$150,000 or more	17.0%	6.2%	6.7%	255
Not stated	12.7%	11.6%	11.7%	109	
Average Household Income		\$102,032	\$73,142	\$74,303	N/A

- 1 - "Non-Scuba & Snorkelers" are defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years but did not participate in scuba diving or snorkelling activities on any trip. The numbers of Scuba & Snorkelers and Non-Scuba & Snorkelers equal the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Scuba & Snorkelers in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Scuba & Snorkelers 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)

Scuba Divers and Snorkelers traveled much more frequently over the past two years than the average U.S. Pleasure Traveler. They were more likely than average to have taken trips both within their own state and to other American states. They were three times more likely than average to have visited Mexico and the Caribbean and were also frequent travelers to overseas destinations.

Scuba Divers and Snorkelers were more likely than the average U.S. Pleasure Traveler to have taken a trip to Canada in the past two years (23.3% versus 14.6%). They were especially likely to have taken trips to Ontario (12.8%), British Columbia (9.1%) and Quebec (7.0%). They were much more likely than the average U.S. Pleasure Traveler to have visited all of the Canadian provinces or territories, and especially Quebec and British Columbia.

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

	Scuba & Snorkelers	Non-Scuba & Snorkelers	Pleasure Travelers	Index
Size of Market	6,938,725	163,571,516	170,510,241	100
All destinations	95.1%	85.0%	85.4%	111
Canada	23.3%	14.2%	14.6%	160
Newfoundland and Labrador	0.7%	0.4%	0.4%	166
Prince Edward Island	1.1%	0.6%	0.6%	178
New Brunswick	1.6%	0.8%	0.8%	191
Nova Scotia	2.0%	1.3%	1.3%	153
Quebec	7.0%	2.9%	3.1%	226
Ontario	12.8%	8.1%	8.3%	155
Manitoba	0.9%	0.5%	0.5%	165
Saskatchewan	0.9%	0.5%	0.5%	176
Alberta	1.8%	1.2%	1.2%	148
British Columbia	9.1%	3.9%	4.1%	220
Yukon	1.1%	0.5%	0.6%	198
Northwest Territories	0.7%	0.4%	0.4%	165
Nunavut	0.1%	LT 0.1%	LT 0.1%	177
Own State	86.6%	79.4%	79.7%	109
Other parts of the U.S.	96.0%	90.4%	90.6%	106
Mexico	41.5%	12.4%	13.6%	306
Caribbean	41.7%	11.5%	12.7%	327
All other destinations	25.4%	8.9%	9.6%	266

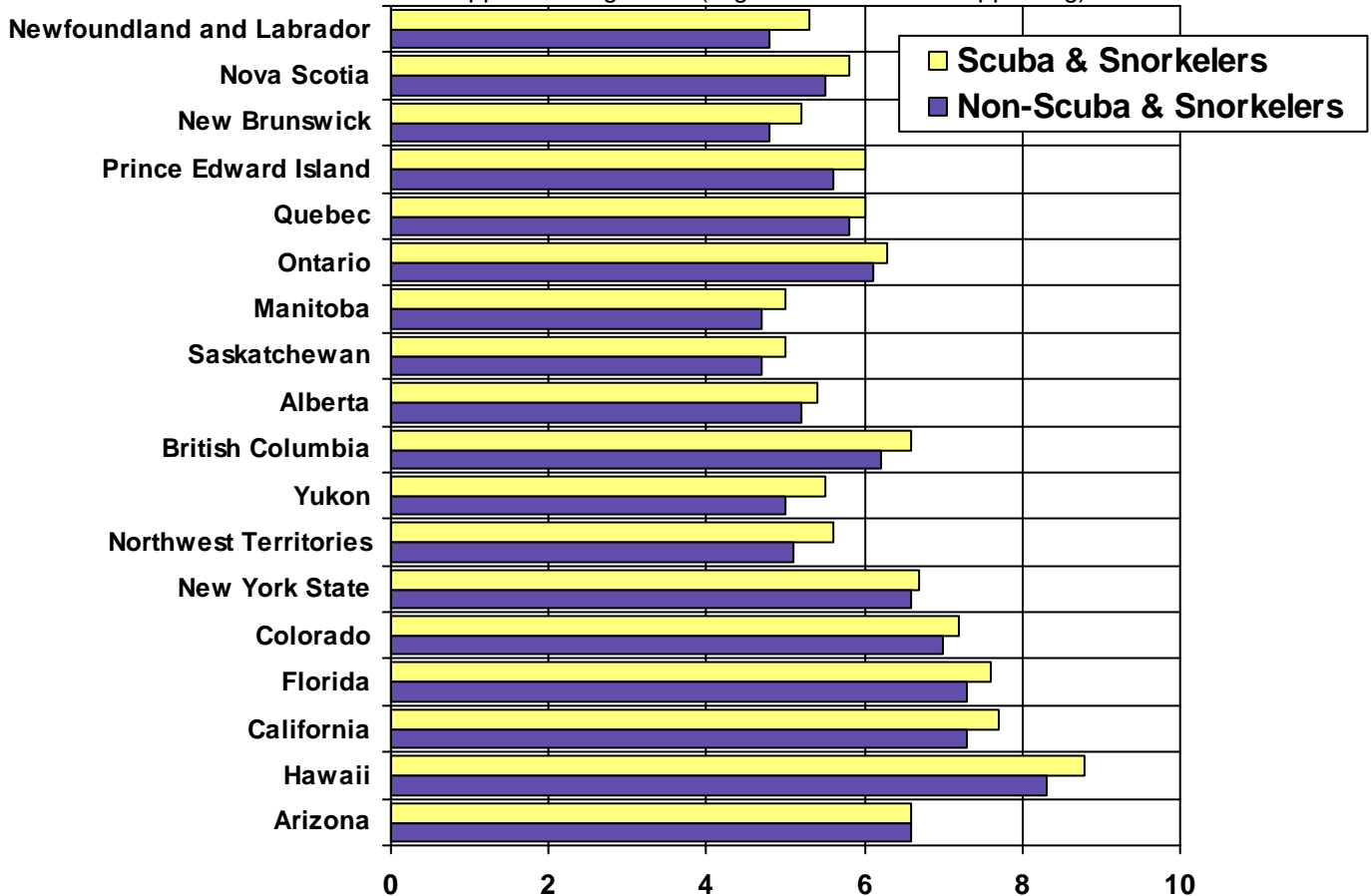
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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 Scuba Divers and Snorkelers were higher than the ratings of other U.S. Pleasure Travelers for all Canadian destinations. British Columbia (6.6) and Ontario (6.3) received the highest ratings among the Canadian provinces and territories.

Hawaii (8.8) received the highest rating among Scuba Divers and Snorkelers, followed by California (7.7) and Florida (7.6). British Columbia was rated as being comparable to two of the reference U.S. states (Arizona 6.6, New York State 6.7).

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

Scuba Divers and Snorkelers were much more likely than the average U.S. Pleasure Traveler to have participated in a wide range of outdoor activities while on trips in the past two years. Almost all Scuba Divers and Snorkelers participated in ocean activities while on trips and most also went hiking, climbing and paddling, and wildlife viewing on trips. Relative to the average U.S. Pleasure Traveler, Scuba Divers and Snorkelers were especially more likely to have engaged in water-related activities, including boating and swimming, fishing, and sailing and surfing. Scuba Divers and Snorkelers were also much more likely than average to have participated in winter activities (downhill skiing & snowboarding, cross-country skiing & snowshoeing), board & blade activities (e.g., skateboarding, ice skating), horseback riding, cycling, motorcycling and extreme sports (e.g., extreme air sports, extreme skiing).

In part, these activity patterns reflect the fact that this segment consists primarily of young and affluent males; 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)

	Scuba & Snorkelers	Non-Scuba & Snorkelers	Pleasure Travelers	Index
Size of Market	6,938,725	163,571,516	170,510,241	100
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	87.5%	37.5%	39.6%	221
Hiking, Climbing & Paddling	50.0%	22.3%	23.5%	213
Wildlife Viewing	50.0%	34.3%	34.9%	143
Boating & Swimming (e.g., motorboating, swimming in lakes)	47.2%	19.9%	21.0%	225
Games & Individual Sports (e.g., tennis, board games)	39.1%	21.5%	22.2%	176
Fishing	34.4%	17.7%	18.4%	187
Exercising & Jogging	31.6%	13.3%	14.1%	224
Downhill Skiing & Snowboarding	27.6%	7.2%	8.0%	343
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	22.4%	4.0%	4.8%	471
Golfing	22.1%	10.2%	10.7%	207
Snowmobiling & ATVing	20.4%	6.6%	7.1%	287
Horseback Riding	19.4%	5.6%	6.2%	315
Cycling	18.5%	5.8%	6.3%	292
Team Sports (e.g., football, baseball, basketball)	15.9%	7.5%	7.9%	202
Board & Blade (e.g., skateboarding, ice-skating)	14.7%	3.6%	4.0%	365
Hunting	10.3%	5.2%	5.4%	190
Motorcycling	9.1%	2.8%	3.1%	299
Extreme Air Sports (e.g., parachuting, bungee jumping)	8.3%	1.4%	1.7%	479
Cross-country Skiing & Snowshoeing	7.7%	1.6%	1.9%	414
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	2.3%	0.3%	0.3%	683

Outdoor Activities Pursued While Not on Trips

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

Fig. 8 Outdoor Activities Pursued While NOT on Trips

	Scuba & Snorkelers	Non-Scuba & Snorkelers	Pleasure Travelers	Index
Size of Market	6,938,725	163,571,516	170,510,241	100
Swimming	75.3%	55.7%	56.5%	133
Day outing to a park	66.5%	63.0%	63.1%	105
Exercising at home or at a fitness club	66.3%	55.6%	56.0%	118
Gardening	52.4%	53.1%	53.1%	99
Picnicking	48.0%	47.7%	47.7%	101
Hiking	45.7%	31.9%	32.5%	141
Fishing	38.7%	32.5%	32.8%	118
Sailing or other boating	38.3%	19.2%	20.0%	192
Cycling	37.2%	22.3%	22.9%	163
Camping	36.0%	26.3%	26.7%	135
Jogging	32.6%	19.0%	19.5%	167
Hunting	28.8%	17.8%	18.3%	158
Playing team sports	24.8%	15.4%	15.8%	157
Playing racquet sports (e.g., tennis or badminton)	23.2%	12.8%	13.2%	175
Canoeing or kayaking	19.0%	7.4%	7.8%	242
Riding an all-terrain vehicle (ATV)	17.9%	11.2%	11.5%	156
Downhill skiing	16.2%	5.3%	5.7%	283
Horseback riding	15.2%	8.3%	8.6%	177
Hunting	14.9%	11.6%	11.8%	127
Rollerblading	14.3%	7.0%	7.3%	195
Ice-skating	11.1%	5.3%	5.5%	202
Snowboarding	7.4%	2.5%	2.7%	276
Snowmobiling	7.0%	3.2%	3.3%	212
Cross-country skiing	6.8%	2.3%	2.5%	270
Skateboarding	5.1%	2.1%	2.2%	234

Culture and Entertainment Activities Pursued While on Trips

Scuba Divers and Snorkelers were much more likely than the average U.S. Pleasure Traveler to pursue a wide range of culture and entertainment activities when on trips. The majority of Scuba Divers and Snorkelers visit historical sites, museums and art galleries, theme parks and exhibits, casino, theatre and comedy clubs, fairs and festivals, and spas when they travel. Relative to the average U.S. Pleasure Traveler, they were especially more likely to go to rock concerts and recreational dancing, visit garden theme attractions, attend cultural events (e.g., high art performances, theatre, film and music festivals) and take part in learning-related activities (e.g., aboriginal cultural experiences, archaeological digs, participatory historical activities).

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

	Scuba & Snorkelers	Non-Scuba & Snorkelers	Pleasure Travelers	Index
Size of Market	6,938,725	163,571,516	170,510,241	100
Shopping and Dining	88.8%	77.2%	77.7%	114
Historical Sites, Museums & Art Galleries	68.6%	52.8%	53.5%	128
Theme Parks & Exhibits	67.2%	48.2%	49.0%	137
Casino, Theatre and Comedy Clubs	66.4%	44.5%	45.4%	146
Fairs and Festivals	58.4%	40.2%	41.0%	142
Fine Dining and Spas	57.5%	31.9%	33.0%	174
Wine, Beer and Food Tastings	40.3%	22.2%	22.9%	176
Science and Technology Exhibits	40.2%	24.1%	24.8%	162
Rock Concerts and Recreational Dancing	33.1%	14.5%	15.3%	217
Professional Sporting Events	28.7%	15.6%	16.1%	178
Garden Theme Attractions	26.5%	13.1%	13.7%	194
Equestrian & Western Events	24.5%	15.1%	15.5%	158
Agro-Tourism	23.2%	13.1%	13.5%	172
High Art Performances	22.6%	10.5%	10.9%	207
Aboriginal Cultural Experiences	18.5%	8.2%	8.6%	216
Theatre, Film & Musical Festivals	17.9%	7.9%	8.3%	215
Archaeological Digs & Sites	13.8%	5.2%	5.5%	251
Amateur Tournaments	13.7%	7.4%	7.7%	178
Participatory Historical Activities	8.9%	3.7%	3.9%	227
National & International Sporting Events	5.6%	1.7%	1.9%	300

Culture and Entertainment Activities Pursued While Not on Trips

The majority of Scuba Divers and Snorkelers went to restaurants, visited festivals or fairs, and visited zoos or aquariums while NOT traveling. Relative to the average U.S. Pleasure Traveler, Scuba Divers and Snorkelers were much more likely to go to day spas and jazz clubs when not on a trip. They were also more likely than average to attend entertainment activities involving live music (e.g., bars with live pop or rock music, rock concerts, dancing) and to attend high art performance (e.g., the ballet, the opera).

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

	Scuba & Snorkelers	Non-Scuba & Snorkelers	Pleasure Travelers	Index
Size of Market	6,938,725	163,571,516	170,510,241	100
Going out to eat in restaurants	95.2%	92.7%	92.8%	103
Going to festivals or fairs	70.9%	65.2%	65.5%	108
Going to zoos or aquariums	51.2%	45.4%	45.6%	112
Going to professional sporting events	48.4%	34.3%	34.9%	139
Going to amateur sporting events	48.1%	39.5%	39.9%	121
Going to amusement or theme parks	45.8%	37.8%	38.1%	120
Going to historic sites or heritage buildings	44.7%	39.9%	40.1%	111
Going to museums	43.8%	37.2%	37.5%	117
Going to bars with live pop or rock bands	38.0%	22.9%	23.6%	161
Going to live theatre	37.8%	28.8%	29.2%	130
Going to art galleries or art shows	36.2%	27.4%	27.8%	130
Going to rock music concerts	33.7%	20.8%	21.3%	158
Going to pick-your-own farms or farmers' market	32.6%	31.5%	31.6%	103
Going dancing	32.5%	20.3%	20.8%	156
Going to gamble in casinos	31.0%	27.9%	28.0%	111
Going to botanical gardens	25.5%	19.7%	20.0%	128
Going to day spas	21.4%	9.8%	10.3%	208
Going to classical music concerts	20.1%	14.7%	14.9%	135
Going to jazz clubs	16.2%	7.6%	7.9%	205
Staying overnight in a hotel or B&B in own city	14.3%	10.4%	10.6%	136
Going to the ballet	11.4%	6.9%	7.0%	162
Going to the opera	10.4%	5.5%	5.7%	181
Going to rodeos	10.0%	8.1%	8.2%	122

Accommodations Stayed In While on Trips

The majority of Scuba Divers and Snorkelers stayed at a seaside resort while on a trip in the past two years. They were also much more likely than the average U.S. Pleasure Traveler to have stayed at a health spa and on a houseboat when on a trip. This segment was also much more likely than average to have stayed at some of the more unusual accommodation types, including remote or fly-in wilderness lodges or outposts, cooking schools or wine tasting schools.

Fig. 11 Accommodations Stayed In While on Trips

	Scuba & Snorkelers	Non-Scuba & Snorkelers	Pleasure Travelers	Index
Size of Market	6,938,725	163,571,516	170,510,241	100
Seaside Resort	58.5%	36.3%	37.7%	155
A Public Campground in a National, State, Provincial or Municipal Park	37.9%	34.6%	34.8%	109
Lakeside / Riverside Resort	31.2%	25.2%	25.6%	122
Ski Resort or Mountain Resort	29.6%	17.7%	18.4%	160
A Private Campground	21.5%	20.9%	20.9%	103
A Camp Site in a Wilderness Setting (Not a Campground)	15.1%	9.3%	9.6%	156
Health Spa	14.1%	5.9%	6.5%	218
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	10.9%	8.6%	8.7%	125
Wilderness Lodge You Can Drive to by Car	10.4%	7.0%	7.2%	145
On a Houseboat	7.3%	2.6%	2.9%	248
Country Inn or Resort with Gourmet Restaurant	6.7%	3.9%	4.1%	164
Farm or Guest Ranch	6.0%	4.0%	4.1%	145
Remote or Fly-In Wilderness Lodge	3.8%	1.5%	1.7%	226
Cooking School	3.6%	1.0%	1.2%	308
Remote or Fly-In Wilderness Outpost	2.9%	0.8%	0.9%	315
Wine Tasting School	2.0%	0.8%	0.9%	230

Tours and Cruises Taken During Past Two Years

Scuba Divers and Snorkelers were much more likely than the average U.S. Pleasure Traveler to have taken tours and cruises while on trips in the past two years. The most popular tours among Scuba Divers and Snorkelers were organized and self-guided sameday tours. However, Scuba Divers and Snorkelers were much more likely than the average U.S. Pleasure Traveler to have taken ocean cruises, including Caribbean and Alaskan cruises. They were also much more likely to have taken sightseeing cruises, Great Lakes cruises and submarine cruises. Scuba Divers and Snorkelers were much more likely than the average U.S. Pleasure Traveler to have taken wilderness tours, tours of wineries or factories, and air tours as a pilot or passenger.

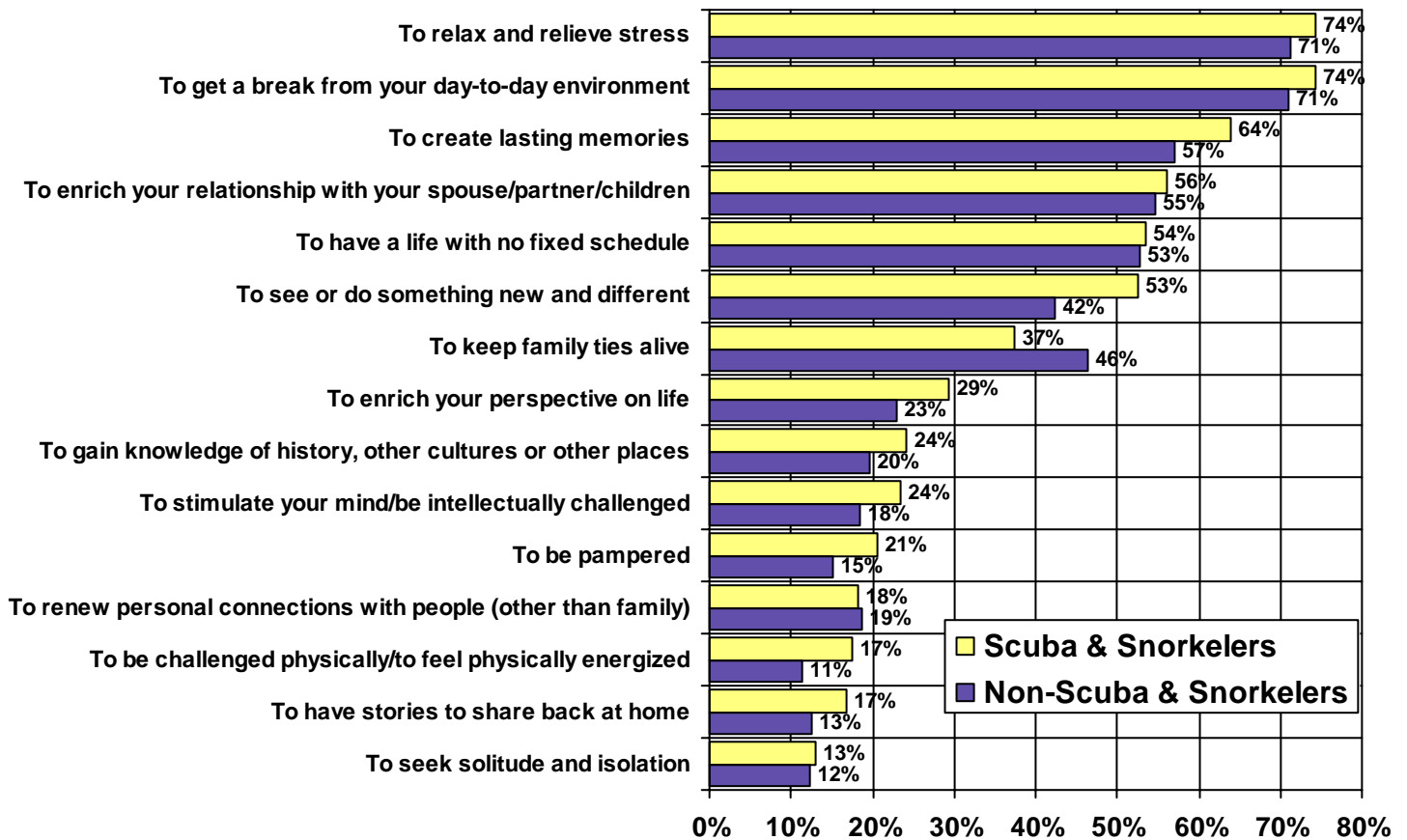
Fig. 12 Tours and Cruises Taken During Past Two Years

	Scuba & Snorkelers	Non-Scuba & Snorkelers	Pleasure Travelers	Index
Size of Market	6,938,725	163,571,516	170,510,241	100
An organized sameday guided tour while on an overnight trip	31.5%	18.0%	18.5%	170
A self-guided sameday tour while on an overnight trip	31.5%	18.7%	19.2%	164
Around the city	25.1%	15.4%	15.8%	159
Caribbean ocean cruise	24.8%	8.3%	9.0%	275
Around the country side - scenic drives	21.5%	12.7%	13.1%	164
A self-guided overnight tour where you stayed in different locations	18.1%	10.1%	10.4%	175
On the water (sightseeing cruise)	17.7%	7.3%	7.8%	227
Wilderness tour	15.9%	7.1%	7.4%	214
Some other type of tour	15.7%	8.5%	8.8%	178
An organized overnight guided tour where you stayed in different locations	15.6%	7.5%	7.9%	198
Ocean cruise - Other	11.8%	4.5%	4.8%	246
An organized overnight guided tour where you stayed in a single location	10.3%	6.6%	6.7%	153
To a winery	7.9%	3.4%	3.6%	220
To a casino	7.2%	4.8%	4.9%	147
Alaskan ocean cruise	5.3%	2.4%	2.5%	213
In the air as a pilot or passenger of an airplane or helicopter	4.2%	1.3%	1.4%	299
Some other type of cruise	3.8%	1.6%	1.7%	223
To a factory	3.8%	1.7%	1.8%	207
Cruise on another lake or river	3.3%	1.9%	2.0%	166
Great Lakes cruise	1.0%	0.4%	0.4%	268
Submarine cruise	0.9%	0.2%	0.2%	345
Cruise on the St. Lawrence River	0.3%	0.3%	0.3%	97

Benefits Sought While on Vacation

Most Scuba Divers and Snorkelers take a vacation to relax and relieve stress, get a break from their day-to-day environment, create lasting memories, enrich family relationships, live without a fixed schedule, and to see or do something new and different. Among these benefits, Scuba Divers and Snorkelers consider it particularly important that their vacations create lasting memories and provide opportunities to see or do something new and different. Scuba Divers and Snorkelers are also more likely than the average U.S. Pleasure Traveler to look for opportunities to learn on vacation (e.g., enrich their perspective on life, gain knowledge of the history and culture of a destination, stimulate their mind) and to be physically challenged and energized. At the same time, they are more likely than others to want to be pampered while on vacation.

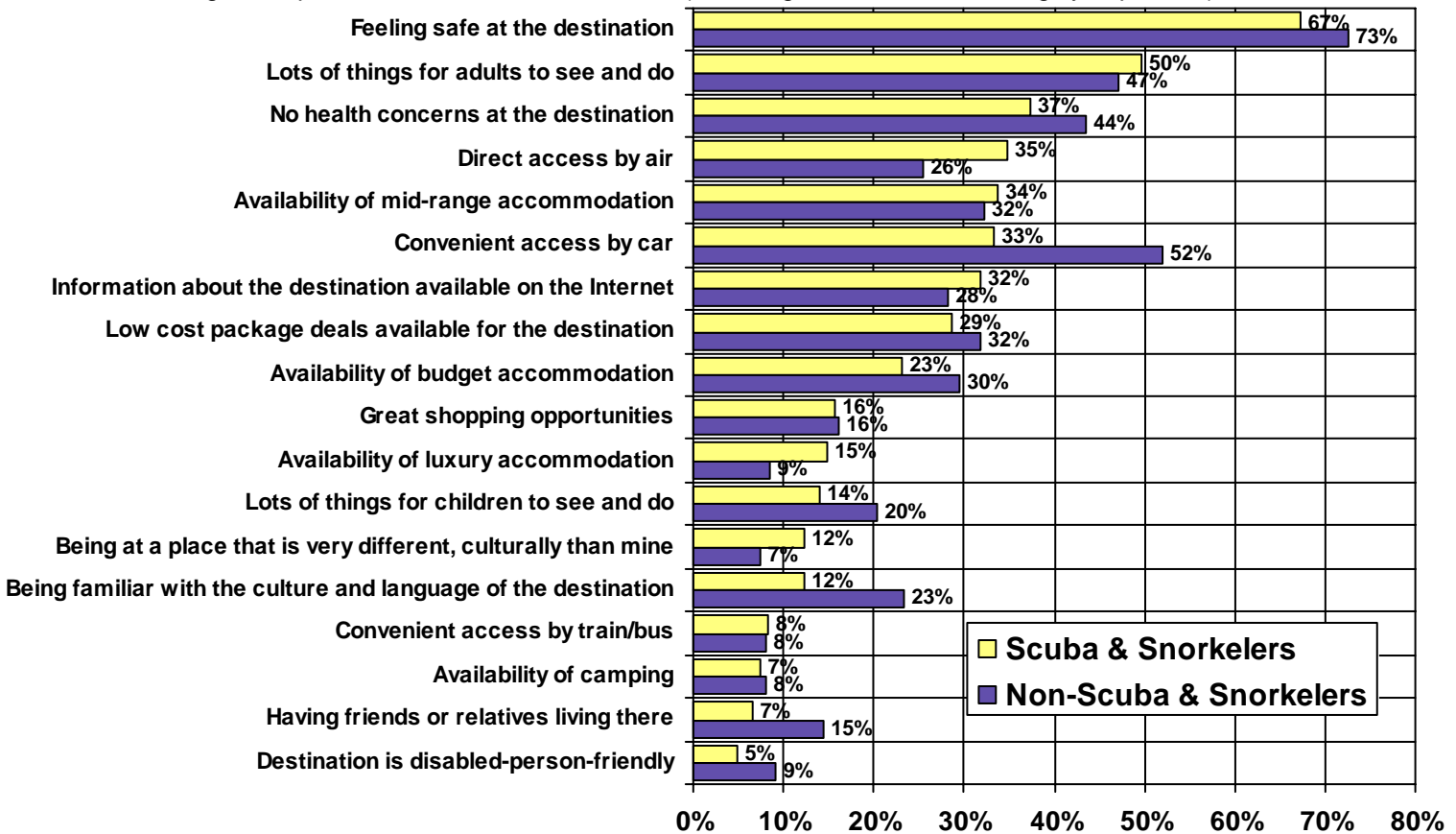
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

The majority of Scuba Divers and Snorkelers consider it important to feel safe at a destination and to have lots of things to see and do. Relative to the average U.S. Pleasure Traveler, Scuba Divers and Snorkelers consider it important that a destination is directly accessible by air, has luxury accommodations, and offers a culture that is different from home. Conversely, Scuba Divers and Snorkelers are less likely than others to consider it important that a destination is conveniently accessible by car, offers low-cost package deals, budget accommodations and has a familiar culture and language.

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



How Destinations Are Selected

Respondents were asked a series of questions concerning how they select destinations. Most Scuba Divers and Snorkelers start planning a trip with a particular destination in mind. However, relative to the average U.S. Pleasure Traveler, they are more likely to begin their winter vacation planning by considering the specific activities they want to do. Scuba Divers and Snorkelers are also much more likely than average to look for package deals without having a specific destination in mind, although this strategy is not widely used.

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

	Scuba & Snorkelers	Non-Scuba & Snorkelers	Pleasure Travelers	Index
Size of Market	6,938,725	163,571,516	170,510,241	100
Summer				
Started with a desired destination in mind	55.9%	58.3%	58.2%	96
Started by considering specific activities wanted to do	11.5%	9.9%	9.9%	116
Started with a certain type of vacation experience in mind	18.3%	17.2%	17.3%	106
Looked for packaged deals - no destination in mind	2.2%	1.1%	1.1%	201
Considered something else first	4.2%	4.6%	4.6%	93
Don't know/Other	7.8%	8.9%	8.9%	88
Winter				
Started with a desired destination in mind	53.6%	59.2%	58.9%	91
Started by considering specific activities wanted to do	21.8%	10.7%	11.3%	193
Started with a certain type of vacation experience in mind	12.9%	14.9%	14.8%	88
Looked for packaged deals - no destination in mind	2.5%	1.4%	1.4%	173
Considered something else first	3.4%	5.5%	5.3%	64
Don't know/Other	5.7%	8.4%	8.3%	70

Trip Planning and Information Sources Consulted

Similar to U.S. Pleasure Travelers overall, most Scuba Divers and Snorkelers (57.6%) participate in planning vacation trips. However, for Scuba Divers and Snorkelers trip planning is slightly more likely to be a shared responsibility. This segment is more likely than average to consult a wide variety of information sources when planning a trip. While the majority use the Internet, past experience and word-of-mouth, they are more likely than the average U.S. Pleasure Traveler to obtain vacation information from travel agents, travel guidebooks (e.g., Fodor's), television programs, electronic newsletters or magazines, and trade, travel and sports shows.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Scuba & Snorkelers	Non-Scuba & Snorkelers	Pleasure Travelers	Index
Size of Market		6,938,725	163,571,516	170,510,241	100
Who Plans Trips?	Respondent plans trips	38.4%	39.2%	39.2%	98
	Trip planning a shared responsibility	19.2%	17.5%	17.6%	109
	Someone else plans trips	42.4%	43.3%	43.2%	98
Information Sources Consulted	An Internet website	89.5%	75.4%	76.0%	118
	Past experience / Been there before	58.7%	54.3%	54.5%	108
	Advice of others / Word-of-mouth	56.0%	44.9%	45.4%	123
	A travel agent	39.3%	17.7%	18.6%	211
	Maps	33.0%	32.7%	32.7%	101
	Official travel guides or brochures from state / province	28.4%	20.2%	20.6%	138
	An auto club such as AAA	26.5%	23.9%	24.0%	110
	Articles in newspapers / magazines	25.1%	17.8%	18.1%	138
	Travel guide books such as Fodor's	23.5%	11.5%	12.0%	196
	Visitor information centres	23.4%	20.3%	20.4%	115
	Travel information received in the mail	20.1%	15.6%	15.8%	128
	Advertisements in newspapers / magazines	15.3%	10.7%	10.9%	141
	Programs on television	11.9%	6.9%	7.1%	167
	An electronic newsletter or magazine received by e-mail	11.1%	5.8%	6.0%	185
	Advertisements on television	6.0%	3.9%	4.0%	151
	Visits to trade, travel or sports shows	5.4%	2.3%	2.4%	223

Use of the Internet to Plan and Arrange Trips

The Internet is a key source of information for Scuba Divers and Snorkelers when planning and booking travel. Scuba Divers and Snorkelers are more likely than the average U.S. Pleasure Traveler to use the Internet to plan trips (83.6%). Moreover, two-thirds of Scuba Divers and Snorkelers (67.2%) book trip components online compared to less than one-half of U.S. Pleasure Travelers overall.

The majority of Scuba Divers and Snorkelers use travel planning / booking websites (e.g., Expedia), airline websites, and hotel or resort websites. They are also much more likely than average to use a cruise line website.

Most Scuba Divers and Snorkelers book airline tickets, accommodations and rental cars over the Internet. They are also much more likely than average to use the Internet to book trip packages.

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

		Scuba & Snorkelers	Non-Scuba & Snorkelers	Pleasure Travelers	Index
Size of Market		6,938,725	163,571,516	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	16.4%	31.6%	31.0%	53
	Uses Internet to plan trips only	16.4%	20.3%	20.1%	81
	Uses Internet to book part of trip	67.2%	48.1%	48.9%	137
Types of Websites Consulted	A travel planning / booking website	70.2%	54.9%	55.6%	126
	An airline's website	61.7%	44.7%	45.6%	135
	A website of a hotel or resort	59.7%	53.0%	53.3%	112
	A tourism website of a country / region / city	40.8%	34.8%	35.1%	116
	A website of an attraction	36.5%	33.2%	33.4%	109
	A cruise line website	27.0%	11.7%	12.4%	217
	Some other website	27.0%	25.0%	25.1%	108
	A motorcoach website	2.1%	1.3%	1.3%	159
Parts of Trips Booked Over The Internet	Air tickets	83.7%	69.8%	70.6%	119
	Accommodations	77.1%	71.5%	71.9%	107
	Car rental	50.8%	37.2%	38.0%	134
	Tickets or fees for specific activities or attractions	34.8%	25.8%	26.3%	132
	A package containing two or more items	32.3%	16.9%	17.8%	182
	Tickets for rail, bus or boat / ship fares	19.6%	11.4%	11.9%	165
	Other	4.6%	2.8%	2.9%	155

Media Consumption Habits

Scuba Divers and Snorkelers are avid consumers of travel-related media. Most Scuba Divers and Snorkelers frequently or occasionally read the travel section of a weekend newspaper and visit travel-related websites. They are also much more likely than the average U.S. Pleasure Traveler to read travel magazines and to watch travel programs on television. Relative to the average U.S. Pleasure Traveler, Scuba Divers and Snorkelers read magazine about outdoor activity and sports, photography & video and business, finance & investments. Their television preferences include science & nature programming, science fiction and fantasy and late-night talk shows. They tend to listen to modern or alternative rock or jazz) on the radio.

Fig. 18 Media Consumption Habits

		Scuba & Snorkelers	Non-Scuba & Snorkelers	Pleasure Travelers	Index
Size of Market		6,938,725	163,571,516	170,510,241	100
Newspaper Readership	Reads daily newspaper	57.6%	60.0%	59.9%	96
	Reads weekend edition of newspaper	57.2%	55.5%	55.5%	103
	Reads local neighbourhood or community newspapers	50.2%	49.5%	49.5%	101
	Reads other types of newspapers	15.4%	13.8%	13.9%	111
	Frequently or occasionally reads travel section of daily newspaper	47.0%	42.8%	43.0%	109
	Frequently or occasionally reads travel section of weekend newspaper	55.7%	49.0%	49.3%	113
Types of Magazines Read (Top 5 Indexed)	Travel (e.g., Condé Nast)	22.2%	10.1%	10.6%	209
	Outdoor activities / sports	20.4%	10.3%	10.7%	190
	Photography and video	7.2%	3.8%	3.9%	184
	Business, finance and investing	23.4%	13.6%	14.0%	168
	Magazines about your city	11.3%	6.7%	6.9%	164
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	39.5%	28.5%	28.9%	137
	Science & nature shows	44.3%	36.4%	36.8%	121
	Science fiction / Fantasy shows	27.7%	23.8%	24.0%	116
	Late night talk shows	30.6%	26.9%	27.1%	113
	History	49.8%	44.8%	45.0%	111
Type of Radio Programs Listened To (Top 5 Indexed)	Multicultural	7.6%	4.6%	4.7%	160
	Modern rock / Alternative rock	45.6%	32.4%	32.9%	139
	Top 40 / Current hits	34.8%	25.7%	26.1%	133
	Jazz / Big band	12.9%	9.9%	10.0%	128
	Classical music	17.6%	14.0%	14.1%	124
Types of Websites Visited (Top 5 Indexed)	Travel	63.2%	47.2%	48.0%	132
	Magazine sites	18.0%	14.6%	14.8%	122
	Sites for specific activities or interests	39.0%	32.2%	32.5%	120
	Network news sites (e.g., CNN)	46.2%	38.3%	38.7%	119
	Sports	35.1%	29.7%	30.0%	117

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