

U.S. TRAVEL MARKET

**Downhill Skiing & Snowboarding
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, 6.2% (13,702,969) of adult Americans went downhill skiing or snowboarding while on an out-of-town, overnight trip of one or more nights. More American travelers went downhill skiing (4.9%) than snowboarding (2.0%) while on a trip. A majority of Downhill Skiers and Snowboarders (71.1%, or 9,745,079) reported that this activity was the main reason for taking at least one trip.

Downhill Skiers and Snowboarders tend to be younger (18 to 34), single and male. They are more affluent than the average U.S. Pleasure Traveler with higher household incomes and post-graduate education. They are over-represented in Alaska, the Pacific Region, the Mountain Region and the New England Region of the United States, and are more likely to live in large urban centers with populations of 2 million or more.

Downhill Skiers and Snowboarders were more likely than the average U.S. Pleasure Traveler to have taken a trip to Canada in the past two years (24.8% versus 14.6%). The most common destinations were Ontario, British Columbia and Quebec. However, relative to the average U.S. Pleasure Traveler, they were especially likely to have taken a trip to Quebec, British Columbia and Alberta during the past two years. As such, Downhill Skiers and Snowboarders are a prime target market for these provinces.

Downhill Skiers and Snowboarders tend to take vibrant, high-energy trips and participate in a wide array of outdoor activities and culture and entertainment pursuits. They were especially more likely than the average U.S. Pleasure Traveler to have participated in physically challenging outdoor activities while on trips, including both winter activities (e.g., extreme skiing, cross-country skiing and snowshoeing) and summer activities (e.g., extreme air sports, scuba and snorkelling). They were also more likely than the average U.S. Pleasure Traveler attend sporting events, theatre and comedy clubs, rock concerts, wine, beer and food tastings and to have gone recreational dancing when on trips. Downhill Skiers and Snowboarders seek vacation experiences that provide a break from their day-to-day environment, are physically challenging and energizing, and offer something new and different to see or do.

Almost all Downhill Skiers and Snowboarders consult the Internet for travel information and the majority (68.2%) have booked travel online. They are also more likely than the average U.S. Pleasure Traveler to obtain travel information from guide books such as Fodor's and electronic newsletters. Downhill Skiers and Snowboarders are also more likely than the average U.S. Pleasure Traveler to consume sports-related programming on television and the radio, in magazines and on websites. They tend to listen to modern / alternative rock and Top 40 / current hits radio. As such, these are likely to be the most effective media by which to reach this travel sector.

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 persons who went downhill skiing or snowboarding 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.

Downhill Skiing & Snowboarding While on Trips

Market Incidence

Over the last two years, 6.2% (13,702,969) of adult Americans went downhill skiing or snowboarding while on an out-of-town, overnight trip of one or more nights. 4.9% went downhill skiing, 2.0% went snowboarding and 0.7% participated in both activities.

Of those who went downhill skiing or snowboarding while on a trip, the majority (71.1%, or 9,745,079 adult Americans) reported that this activity was the main reason for taking at least one trip in the past two years. Downhill skiing (72.3%) was more likely than snowboarding (59.2%) to be mentioned as the main reason for taking at least one trip.

Fig. 1 Incidence of Downhill Skiing & Snowboarding While on Trips¹

Size of Market	Number of Downhill Skiers / Snowboarders ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total U.S. Population ⁵
Downhill Skiing & Snowboarding (All Activities)	13,702,969	71.1%	8.0%	6.2%
Downhill skiing	10,910,552	72.3%	6.4%	4.9%
Snowboarding	4,417,595	59.2%	2.6%	2.0%
Participated in both activities	1,625,178	46.9%	1.0%	0.7%

- 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 - "Downhill Skiers/Snowboarders" are defined as individuals who went downhill skiing or snowboarding 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, overnight 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

Relative to the average U.S. Pleasure Traveler, Downhill Skiers and Snowboarders tend to be over-represented in Alaska, the Pacific Region, the Mountain Region and the New England Region of the United States. They are also more likely than the average U.S. Pleasure Traveler to live in large urban centers with populations of 2 million or more.

Fig. 2 Geographic Distribution & Population Size of Those Who Go Downhill Skiing or Snowboarding While on Trips

	Total Population	Estimated Number Who Downhill Skied / Snowboarded on a Trip	Percent of Pleasure Travelers in Region Who Downhill Skied / Snowboarded on a Trip	Percent of Total Regional Population Who Downhill Skied / Snowboarded on a Trip
United States	222,846,268	13,702,969	8.0%	6.2%
New England	11,095,629	906,270	10.6%	8.2%
Middle Atlantic	31,005,526	1,909,904	8.3%	6.2%
East North Central	34,621,254	1,573,792	5.9%	4.6%
West North Central	15,024,360	689,664	5.7%	4.6%
South Atlantic	42,602,998	2,051,112	6.4%	4.8%
East South Central	13,597,436	470,396	4.9%	3.5%
West South Central	24,853,901	1,315,570	7.3%	5.3%
Mountain	15,030,720	1,297,826	10.7%	8.7%
Pacific	34,529,689	3,421,259	12.3%	9.9%
Alaska	484,754	67,177	15.9%	13.9%
Not available	745,757	78,702	12.7%	10.6%
Less than 100,000	29,429,442	992,070	4.8%	3.4%
100,000 to 499,999	36,551,501	1,693,902	6.2%	4.7%
500,000 to 1,999,999	52,335,815	2,596,901	6.5%	5.0%
2,000,000 or more	103,783,753	8,341,393	10.2%	8.1%

Downhill Skiers and Snowboarders are most likely to be from Colorado, Alaska, California, Rhode Island, District of Columbia, New Mexico and Connecticut. They are least likely to be from Arkansas, Iowa, West Virginia, Missouri or Mississippi (see Fig. 3 on next page).

Fig. 3 Those Who Go Downhill Skiing or Snowboarding While on Trips by U.S. State

Region	State	Population of State	Estimated Number of Downhill Skiers / Snowboarders	Percent of Pleasure Travelers in State	Percent of State Population
United States	All States	222,846,268	13,702,969	8.0%	6.2%
New England	Connecticut	2,685,692	259,062	12.5%	9.6%
	Maine	1,047,770	28,560	3.9%	2.7%
	Massachusetts	4,423,562	352,240	10.1%	8.0%
	New Hampshire	1,604,344	138,705	11.6%	8.6%
	Rhode Island	837,445	89,054	12.8%	10.6%
	Vermont	496,816	38,649	10.1%	7.8%
Middle Atlantic	New Jersey	6,708,501	509,846	9.8%	7.8%
	New York	14,727,054	903,688	8.2%	6.2%
	Pennsylvania	9,569,972	496,370	7.3%	5.2%
East North Central	Illinois	9,521,097	538,091	7.2%	5.7%
	Indiana	4,717,624	165,912	4.6%	3.5%
	Michigan	7,709,890	387,473	6.5%	5.1%
	Ohio	8,412,962	325,392	5.3%	3.9%
	Wisconsin	4,259,682	156,924	4.6%	3.7%
West North Central	Iowa	2,262,393	53,040	3.0%	2.5%
	Kansas	2,304,474	156,511	8.8%	6.8%
	Minnesota	3,946,220	251,513	7.5%	6.4%
	Missouri	4,138,758	123,584	3.9%	3.0%
	Nebraska	1,304,361	42,832	4.1%	3.3%
	North Dakota	488,140	38,598	9.4%	7.9%
	South Dakota	580,015	23,585	5.2%	4.1%
South Atlantic	Delaware	646,427	44,661	9.1%	6.9%
	District of Columbia	521,285	44,165	12.7%	8.5%
	Florida	13,937,467	518,286	4.8%	3.8%
	Georgia	6,668,302	415,001	8.1%	6.2%
	Maryland	3,428,206	218,785	8.2%	6.4%
	North Carolina	6,651,453	267,386	5.4%	4.0%
	South Carolina	3,241,944	102,191	4.3%	3.2%
	Virginia	5,957,159	412,711	9.0%	7.0%
	West Virginia	1,550,755	27,926	3.2%	1.8%
East South Central	Alabama	3,431,591	128,077	5.3%	3.7%
	Kentucky	3,447,277	118,406	4.9%	3.4%
	Mississippi	2,156,793	54,284	3.9%	2.5%
	Tennessee	4,561,775	169,629	5.1%	3.7%
West South Central	Arkansas	2,103,346	23,483	1.7%	1.1%
	Louisiana	3,367,908	118,939	5.3%	3.5%
	Oklahoma	2,643,565	91,275	4.8%	3.5%
	Texas	16,739,082	1,081,874	8.6%	6.5%
Mountain	Arizona	4,451,660	289,507	8.2%	6.5%
	Colorado	3,501,822	528,082	18.3%	15.1%
	Idaho	1,044,920	96,765	11.8%	9.3%
	Montana	726,027	46,334	7.7%	6.7%
	Nevada	1,809,582	57,621	4.0%	3.2%
	New Mexico	1,433,596	139,267	12.7%	9.7%
	Utah	1,671,322	108,595	7.8%	6.5%
	Wyoming	391,790	31,655	9.5%	8.1%
Pacific	Alaska	484,754	67,177	15.9%	13.9%
	California	26,965,837	2,880,420	13.1%	10.7%
	Oregon	2,793,303	190,908	8.8%	6.8%
	Washington	4,770,549	349,932	9.1%	7.4%

Demographic Profile

Downhill Skiers and Snowboarders tend to be unmarried males between the ages of 18 and 34. This segment is much more affluent than the average U.S. Pleasure Traveler with higher household incomes and a university or post-graduate education.

Fig. 4 Demographic Profile of Those Going Downhill Skiing or Snowboarding Relative to All U.S. Pleasure Travelers

Attribute	Size of Market	Downhill Skiers / Snowboarders	Non-Downhill Skiers / Snowboarders ¹	Pleasure Travelers	Index ²
		13,702,969	156,807,272	170,510,241	100
Gender	Male	58.4%	47.7%	48.5%	120
	Female	41.6%	52.3%	51.5%	81
Age of Respondent	18 to 24	22.4%	9.8%	10.8%	207
	25 to 34	29.8%	20.2%	21.0%	142
	35 to 44	18.8%	17.1%	17.3%	109
	45 to 54	18.7%	21.2%	21.0%	89
	55 to 64	7.5%	16.2%	15.5%	48
	65 Plus	2.8%	15.4%	14.4%	20
Average Age		36.4	46.2	45.4	N/A
Marital Status	Not married	37.8%	29.9%	30.5%	124
	Married	62.2%	70.1%	69.5%	90
Parental Status	No children under 18	66.5%	70.3%	70.0%	95
	Children under 18	33.5%	29.7%	30.0%	112
Education	High school or less	9.8%	21.4%	20.5%	48
	Trade, Technical, Community Col.	14.5%	22.0%	21.4%	68
	University Degree	51.6%	40.1%	41.1%	126
	Post Graduate Degree	24.1%	16.5%	17.1%	141
Household Income	Under \$20,000	4.9%	8.4%	8.1%	61
	\$20,000 to \$39,999	9.2%	16.9%	16.2%	56
	\$40,000 to \$59,999	11.8%	17.1%	16.7%	71
	\$60,000 to \$79,999	13.2%	14.8%	14.7%	90
	\$80,000 to \$99,999	13.0%	11.5%	11.6%	112
	\$100,000 to \$149,999	20.2%	13.8%	14.4%	141
	\$150,000 or more	15.7%	5.9%	6.7%	236
	Not stated	12.0%	11.7%	11.7%	103
Average Household Income		\$98,886	\$72,163	\$74,303	N/A

- 1 - "Non-Downhill Skiers / Snowboarders" 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 go downhill skiing or snowboarding on any trip. The numbers of "Downhill Skiers / Snowboarders" and "Non-Downhill Skiers / Snowboarders" equal the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Downhill Skiers / Snowboarders in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Downhill Skiers / Snowboarders are over or under-represented relative to the average U.S. Pleasure Traveler. An index of 100 means the percent participating in the activity is the same as that of the average U.S. Pleasure Traveler. Index values over 100 indicate that those participating in the activity are over-represented relative to the average U.S. Pleasure Traveler. Index values less than 100 indicate that those participating in the activity are under-represented relative to the average U.S. Pleasure Traveler.

Travel Activity (During Last Two Years)

Downhill Skiers and Snowboarders were more likely than the average U.S. Pleasure Traveler to have traveled within their own state and to another U.S. state 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.

Downhill Skiers and Snowboarders were much more likely than the average U.S. Pleasure Traveler to have taken a trip to Canada in the past two years (24.8% versus 14.6%). They were especially likely to have visited Ontario (13.2%), British Columbia (8.7%) and Quebec (7.2%). Relative to the average U.S. Pleasure Traveler, Downhill Skiers and Snowboarders were especially likely to have taken a trip to Quebec (Index=231), British Columbia (Index=211) and Alberta (Index=195).

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

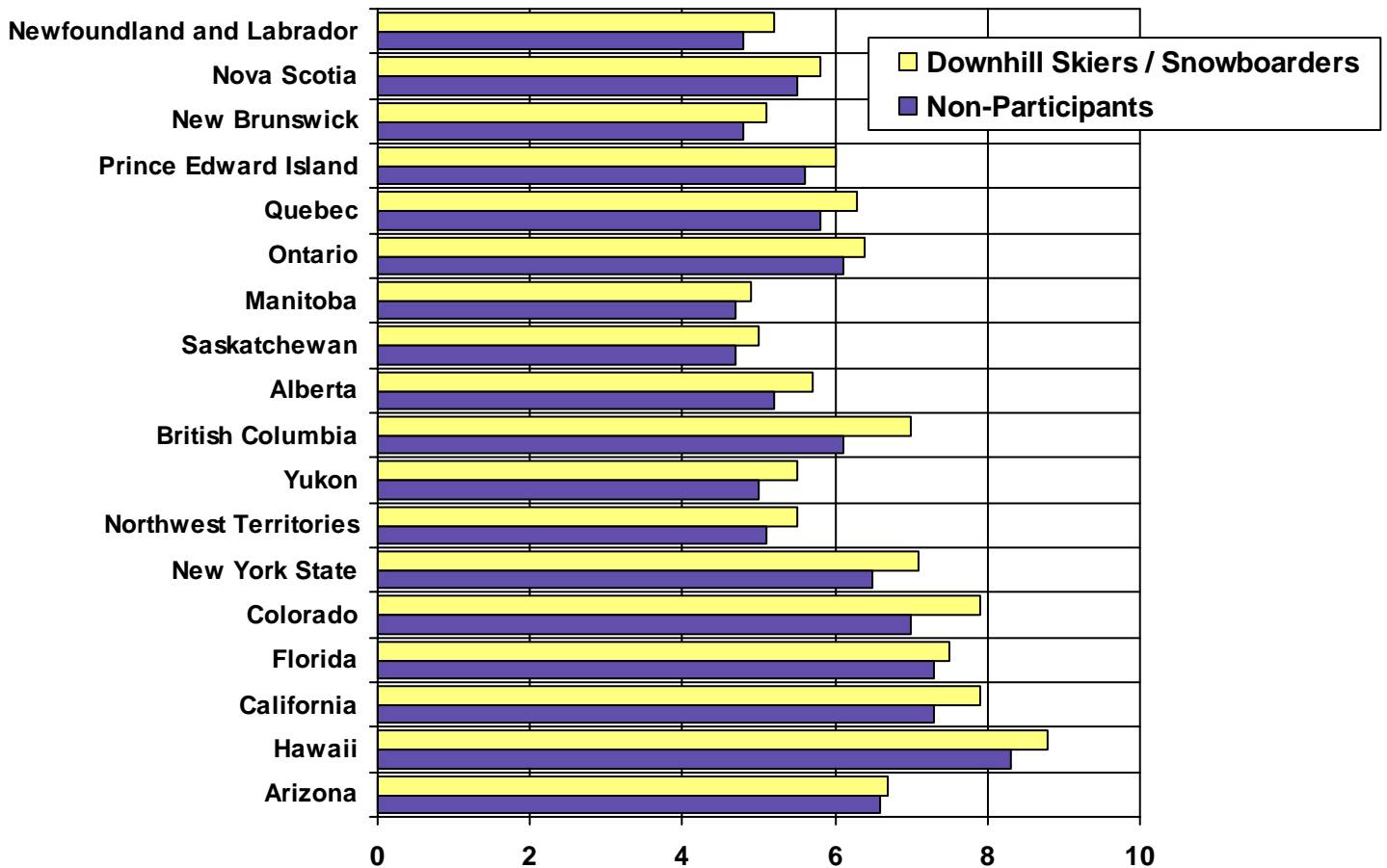
	Downhill Skiers / Snowboarders	Non-Downhill Skiers / Snowboarders	Pleasure Travelers	Index
Size of Market	13,702,969	156,807,272	170,510,241	100
All destinations	94.0%	84.7%	85.4%	110
Canada	24.8%	13.7%	14.6%	170
Newfoundland and Labrador	0.8%	0.4%	0.4%	189
Prince Edward Island	0.7%	0.6%	0.6%	117
New Brunswick	1.2%	0.8%	0.8%	144
Nova Scotia	1.6%	1.3%	1.3%	117
Quebec	7.2%	2.7%	3.1%	231
Ontario	13.2%	7.8%	8.3%	159
Manitoba	0.9%	0.5%	0.5%	168
Saskatchewan	0.8%	0.5%	0.5%	166
Alberta	2.3%	1.1%	1.2%	195
British Columbia	8.7%	3.7%	4.1%	211
Yukon	0.9%	0.5%	0.6%	164
Northwest Territories	0.5%	0.4%	0.4%	134
Nunavut	0.0%	0.0%	0.0%	55
Own State	89.3%	78.9%	79.7%	112
Other parts of United States	96.5%	90.1%	90.6%	107
Mexico	24.9%	12.6%	13.6%	183
Caribbean	20.1%	12.1%	12.7%	157
All other destinations	17.8%	8.8%	9.6%	187

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 Downhill Skiers and Snowboarders tend to be higher than the ratings of non-participants regardless of the destination. British Columbia (7.0) is rated as the most appealing province, followed by Ontario (6.4) and Quebec (6.3). U.S. Pleasure Travelers tend to rate the six reference U.S. states as more appealing than any of the Canadian provinces or territories. Colorado (7.9) is especially likely to have received a high appeal rating among Downhill Skiers and Snowboarders relative to those who did not downhill ski or snowboard on a trip in the last two years.

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

Downhill Skiers and Snowboarders were much more likely than the average U.S. Pleasure Traveler to participate in winter sports while on trips including extreme skiing, cross-country skiing, snowshoeing, ice skating and snowmobiling. They were also more likely than the average U.S. Pleasure Traveler to have participated in strenuous summer activities such as extreme air sports, scuba and snorkelling, sailing and surfing, skateboarding and cycling.

Downhill Skiers and Snowboarders exhibit a keen interest in physically challenging outdoor activities when they travel. This reflects the fact that Downhill Skiers and Snowboarders are primarily young, affluent and male, all of which are attributes that tend to be associated with strenuous outdoor activity.

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

	Downhill Skiers / Snowboarders	Non-Downhill Skiers / Snowboarders	Pleasure Travelers	Index
Size of Market	13,702,969	156,807,272	170,510,241	100
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	65.5%	37.3%	39.6%	166
Hiking, Climbing & Paddling	49.0%	21.2%	23.5%	209
Boating & Swimming (e.g., motorboating, swimming in lakes)	43.3%	19.1%	21.0%	206
Wildlife Viewing	42.9%	34.2%	34.9%	123
Games & Individual Sports (e.g., tennis, board games)	39.5%	20.7%	22.2%	178
Exercising and Jogging	31.2%	12.6%	14.1%	221
Fishing	28.2%	17.5%	18.4%	153
Golfing	24.3%	9.5%	10.7%	228
Snowmobiling & ATVing	20.3%	6.0%	7.1%	285
Cycling	19.6%	5.2%	6.3%	310
Team Sports (e.g., football, baseball, basketball)	19.0%	6.9%	7.9%	241
Board and Blade (e.g., skateboarding, ice-skating)	17.6%	2.8%	4.0%	437
Horseback Riding	16.3%	5.3%	6.2%	264
Sailing and Surfing (e.g., sailing, windsurfing, parasailing)	15.2%	3.9%	4.8%	318
Scuba & Snorkelling	14.0%	3.2%	4.1%	343
Cross-country Skiing & Snowshoeing	10.7%	1.1%	1.9%	574
Hunting	9.1%	5.1%	5.4%	168
Motorcycling	7.2%	2.7%	3.1%	234
Extreme Air Sports (e.g., parachuting, bungee jumping)	6.2%	1.3%	1.7%	357
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	2.4%	0.1%	0.3%	736

Outdoor Activities Pursued While Not on Trips

The very high level of activity exhibited by Downhill Skiers and Snowboarders while on trips is also apparent when they are NOT traveling. The majority of Downhill Skiers and Snowboarders went swimming, exercised at home or at a fitness club and went on day outings to a park. Besides downhill skiing and snowboarding, this segment was also much more likely than the average U.S. Pleasure Traveler to participate in cross-country skiing, snowmobiling and ice skating when not on a trip. They are also more likely than average the U.S. Pleasure Traveler to participate in energetic summer activities (e.g., skateboarding, rollerblading, canoeing or kayaking) and are less likely to participate in less strenuous activities such as gardening and picnicking.

Fig. 8 Outdoor Activities Pursued While NOT on Trips

	Downhill Skiers / Snowboarders	Non-Downhill Skiers / Snowboarders	Pleasure Travelers	Index
Size of Market	13,702,969	156,807,272	170,510,241	100
Swimming	70.4%	55.3%	56.5%	125
Exercising at home or at a fitness club	69.8%	54.9%	56.0%	124
Day outing to a park	66.8%	62.8%	63.1%	106
Hiking	48.9%	31.1%	32.5%	151
Gardening	47.5%	53.6%	53.1%	89
Picnicking	44.9%	48.0%	47.7%	94
Downhill skiing	43.5%	2.4%	5.7%	761
Cycling	40.4%	21.3%	22.9%	177
Camping	38.7%	25.6%	26.7%	145
Jogging	36.7%	18.0%	19.5%	188
Fishing	33.6%	32.7%	32.8%	103
Playing team sports	33.3%	14.3%	15.8%	211
Hunting	33.2%	17.0%	18.3%	181
Sailing or other boating	29.7%	19.1%	20.0%	149
Playing racquet sports (e.g., tennis or badminton)	28.1%	11.9%	13.2%	213
Snowboarding	19.4%	1.2%	2.7%	720
Canoeing or kayaking	18.3%	6.9%	7.8%	233
Rollerblading	17.8%	6.4%	7.3%	243
Riding an all-terrain vehicle (ATV)	15.1%	11.2%	11.5%	132
Horseback riding	13.6%	8.2%	8.6%	159
Ice-skating	13.6%	4.8%	5.5%	247
Hunting	13.0%	11.7%	11.8%	111
Cross-country skiing	8.8%	2.0%	2.5%	351
Snowmobiling	8.4%	2.9%	3.3%	254
Skateboarding	7.8%	1.7%	2.2%	356

Culture and Entertainment Activities Pursued While on Trips

Downhill Skiers and Snowboarders exhibit an interest in high energy nightlife when traveling. Relative to the average U.S. Pleasure Traveler, Downhill Skiers and Snowboarders were more likely to attend national and international sporting events, amateur tournaments and professional sporting events. They are also more likely to attend theatre, film and music festivals, rock concerts, wine beer and food tastings, and high art performances and have gone recreationally dancing when on trips.

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

	Skiers/ Snowboarders	Non-Skiers/ Snowboarders	Pleasure Travelers	Index
Size of Market	13,702,969	156,807,272	170,510,241	100
Shopping and Dining	85.1%	77.1%	77.7%	109
Historical Sites, Museums & Art Galleries	64.1%	52.5%	53.5%	120
Theme Parks & Exhibits	63.4%	47.7%	49.0%	129
Casino, Theatre and Comedy Clubs	58.7%	44.3%	45.4%	129
Fairs and Festivals	54.3%	39.8%	41.0%	132
Fine Dining and Spas	51.8%	31.3%	33.0%	157
Wine, Beer and Food Tastings	40.2%	21.4%	22.9%	175
Science and Technology Exhibits	39.6%	23.5%	24.8%	160
Professional Sporting Events	29.7%	14.9%	16.1%	184
Rock Concerts and Recreational Dancing	29.0%	14.0%	15.3%	190
Equestrian & Western Events	21.4%	14.9%	15.5%	138
Garden Theme Attractions	20.7%	13.1%	13.7%	152
Agro-Tourism	20.6%	12.9%	13.5%	153
High Art Performances	18.9%	10.3%	10.9%	173
Theatre, Film & Musical Festivals	17.0%	7.6%	8.3%	204
Amateur Tournaments	15.4%	7.0%	7.7%	201
Aboriginal Cultural Experiences	12.4%	8.2%	8.6%	145
Archaeological Digs & Sites	9.7%	5.2%	5.5%	175
Participatory Historical Activities	6.3%	3.7%	3.9%	161
National & International Sporting Events	5.6%	1.5%	1.9%	302

Culture and Entertainment Activities Pursued While Not on Trips

Downhill Skiers and Snowboarders are also quite active in cultural and entertainment pursuits when NOT traveling. They are more likely than the average U.S. Pleasure Traveler to attend venues with live rock or jazz music (e.g., rock concerts, bars with live pop or rock bands, jazz clubs), amateur and professional sporting events, and day spas while not on trips. They exhibit less interest than the average U.S. Pleasure Traveler in botanical gardens, pick-your-own farms or farmers' markets and historic sites or heritage buildings. While Downhill Skiers and Snowboarders frequently go to casinos when they travel, they are less likely than the average U.S. Pleasure Traveler to go to a casino when not on a trip.

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

	Downhill Skiers / Snowboarders	Non-Downhill Skiers / Snowboarders	Pleasure Travelers	Index
Size of Market	13,702,969	156,807,272	170,510,241	100
Going out to eat in restaurants	95.2%	92.6%	92.8%	103
Going to festivals or fairs	65.3%	65.5%	65.5%	100
Going to amateur sporting events	50.7%	38.9%	39.9%	127
Going to professional sporting events	50.3%	33.5%	34.9%	144
Going to zoos or aquariums	45.7%	45.6%	45.6%	100
Going to amusement or theme parks	42.7%	37.7%	38.1%	112
Going to museums	40.2%	37.3%	37.5%	107
Going to bars with live pop or rock bands	39.8%	22.1%	23.6%	169
Going to historic sites or heritage buildings	38.7%	40.3%	40.1%	97
Going to rock music concerts	37.3%	19.9%	21.3%	175
Going to live theatre	33.1%	28.8%	29.2%	113
Going to art galleries or art shows	31.0%	27.5%	27.8%	112
Going dancing	30.1%	20.0%	20.8%	145
Going to pick-your-own farms or farmers' market	29.4%	31.8%	31.6%	93
Going to gamble in casinos	27.0%	28.1%	28.0%	96
Going to botanical gardens	17.4%	20.2%	20.0%	87
Going to classical music concerts	16.4%	14.8%	14.9%	110
Going to day spas	16.2%	9.8%	10.3%	158
Staying overnight in a hotel or B&B in own city	12.5%	10.4%	10.6%	118
Going to jazz clubs	12.3%	7.5%	7.9%	155
Going to rodeos	9.3%	8.1%	8.2%	113
Going to the ballet	9.1%	6.9%	7.0%	129
Going to the opera	7.2%	5.6%	5.7%	126

Accommodations Stayed In While on Trips

Two-thirds of Downhill Skiers and Snowboarders (66.8%) stayed at a ski resort or mountain resort while on a trip in the past two years. They are also more likely than the average U.S. Pleasure Traveler to have stayed at a wine tasting or cooking school, a remote or fly-in wilderness outpost or lodge, a houseboat, a health spa and a campsite in a wilderness setting.

Fig. 11 Accommodations Stayed In While on Trips

	Downhill Skiers / Snowboarders	Non-Downhill Skiers / Snowboarders	Pleasure Travelers	Index
Size of Market	13,702,969	156,807,272	170,510,241	100
Ski Resort or Mountain Resort	66.8%	11.0%	18.4%	362
Seaside Resort	39.2%	37.5%	37.7%	104
A Public Campground in a National, State, Provincial or Municipal Park	36.4%	34.6%	34.8%	105
Lakeside / Riverside Resort	27.1%	25.4%	25.6%	106
A Private Campground	21.1%	20.9%	20.9%	101
A Camp Site in a Wilderness Setting (Not a Campground)	14.0%	9.0%	9.6%	145
Health Spa	9.7%	6.0%	6.5%	150
Wilderness Lodge You Can Drive to by Car	8.1%	7.0%	7.2%	113
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	7.8%	8.9%	8.7%	89
On a Houseboat	5.0%	2.6%	2.9%	169
Country Inn or Resort with Gourmet Restaurant	4.7%	4.0%	4.1%	115
Farm or Guest Ranch	3.8%	4.2%	4.1%	93
Remote or Fly-In Wilderness Lodge	2.7%	1.5%	1.7%	159
Cooking School	2.6%	1.0%	1.2%	220
Wine Tasting School	2.1%	0.7%	0.9%	242
Remote or Fly-In Wilderness Outpost	1.8%	0.8%	0.9%	197

Tours and Cruises Taken During Past Two Years

Downhill Skiers and Snowboarders were more likely than the average U.S. Pleasure Traveler to have taken various 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, an organized overnight guided tour with stays in different locations and a wilderness tour. They were also much more likely than the average U.S. Pleasure Traveler to have taken a Great Lakes cruise, and a submarine cruise.

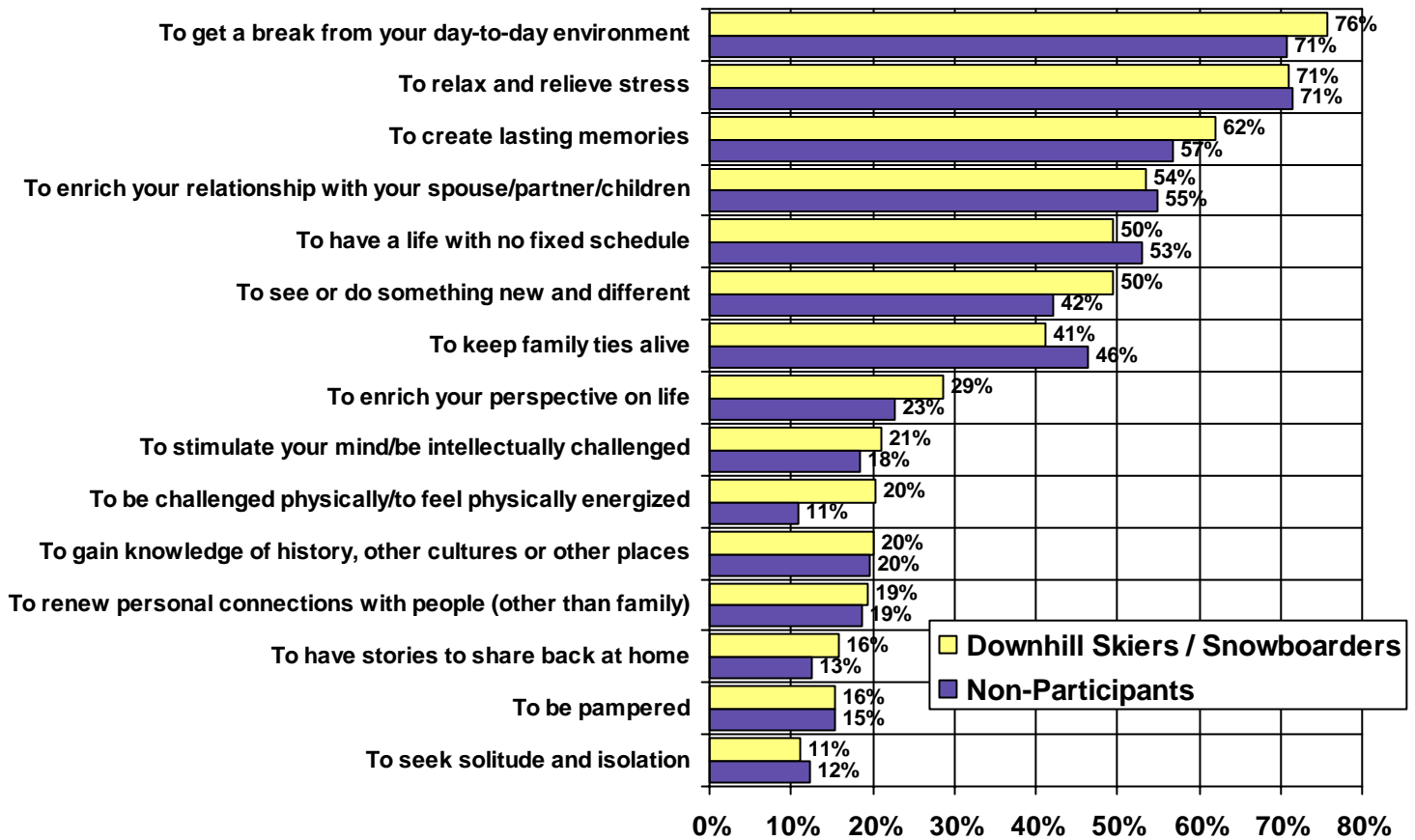
Fig. 12 Tours and Cruises Taken During Past Two Years

	Downhill Skiers / Snowboarders	Non-Downhill Skiers / Snowboarders	Pleasure Travelers	Index
Size of Market	13,702,969	156,807,272	170,510,241	100
A self guided sameday tour while on an overnight trip	25.2%	18.7%	19.2%	131
An organized sameday guided tour while on an overnight trip	22.4%	18.2%	18.5%	121
Around the city	19.4%	15.4%	15.8%	123
A self guided overnight tour where you stayed in different locations	17.4%	9.8%	10.4%	167
Around the country side - scenic drives	15.7%	12.9%	13.1%	119
Caribbean ocean cruise	12.8%	8.7%	9.0%	142
Wilderness tour	12.3%	7.0%	7.4%	166
Some other type of tour	11.2%	8.6%	8.8%	126
An organized overnight guided tour where you stayed in different locations	11.1%	7.6%	7.9%	142
On the water (sightseeing cruise)	10.9%	7.5%	7.8%	140
An organized overnight guided tour where you stayed in a single location	9.4%	6.5%	6.7%	140
Ocean cruise – Other	7.1%	4.6%	4.8%	148
To a winery	6.7%	3.3%	3.6%	188
To a casino	5.8%	4.8%	4.9%	118
Alaskan ocean cruise	3.1%	2.4%	2.5%	124
In the air as a pilot or passenger of an airplane or helicopter	3.0%	1.3%	1.4%	211
Some other type of cruise	2.9%	1.6%	1.7%	170
To a factory	2.8%	1.7%	1.8%	154
Cruise on another lake or river	2.6%	1.9%	2.0%	134
Great Lakes cruise	1.0%	0.3%	0.4%	253
Submarine cruise	0.5%	0.2%	0.2%	192
Cruise on the St. Lawrence River	0.3%	0.3%	0.3%	100

Benefits Sought While on Vacation

Most Downhill Skiers and Snowboarders take vacations in order to get a break from their day-to-day environment, relax and relieve stress, create lasting memories and enrich family relationships. Relative to the average U.S. Pleasure Traveler, Downhill Skiers and Snowboarders are also more likely to seek vacations that are physically challenging and energizing and that allow them to see or do something new or different create lasting memories and enrich their perspective on life. They are less likely than the average U.S. Pleasure Traveler to use their vacations in order to strengthen family ties.

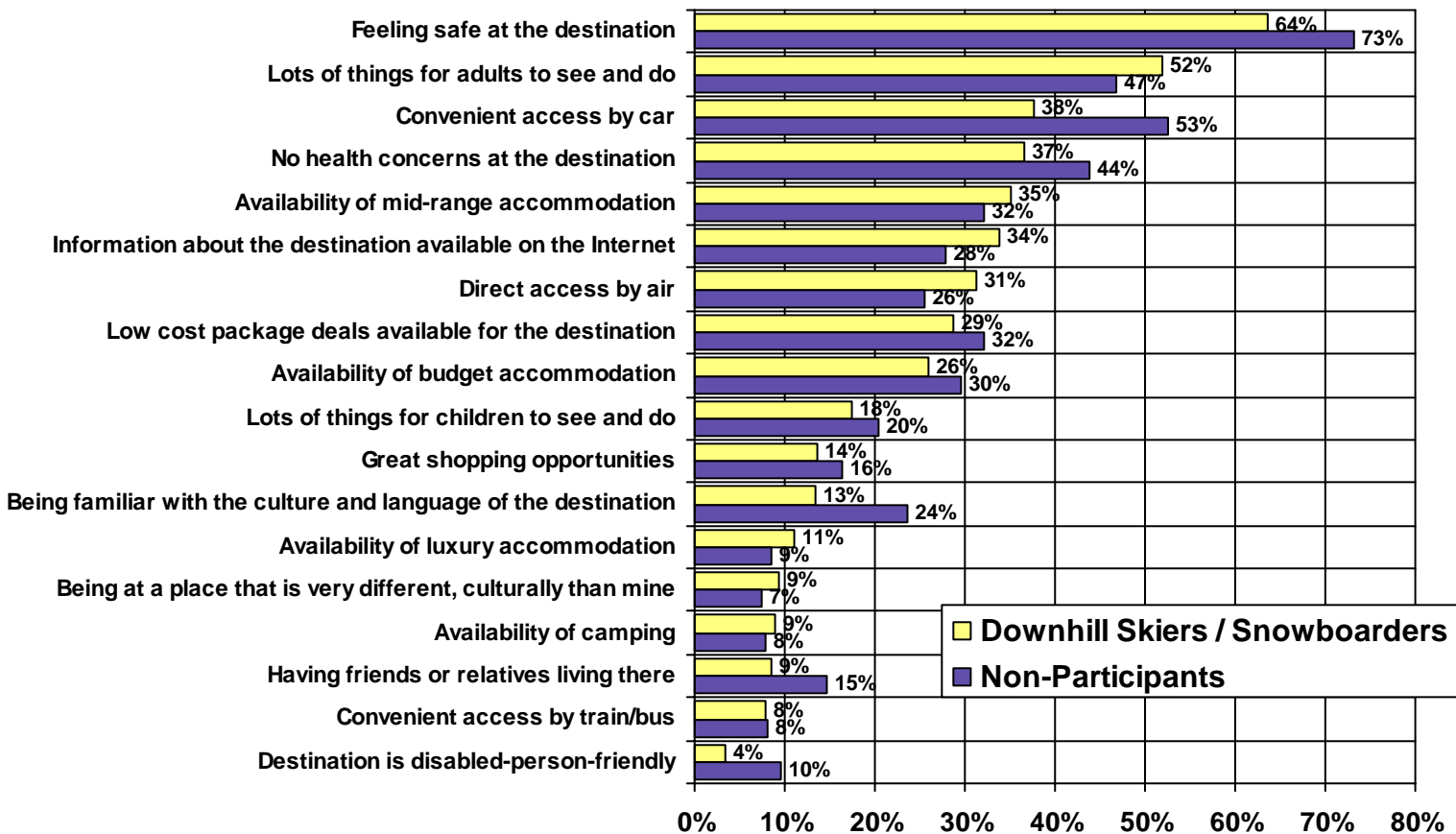
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

As with most U.S. Pleasure Travelers, Downhill Skiers and Snowboarders consider it important that a destination is safe and offers lots to see and do for adults. However, relative to the average U.S. Pleasure Traveler, Downhill Skiers and Snowboarders consider it more important that the destination is accessible by air and that there is information available about the destination on the Internet. They are less likely than the average U.S. Pleasure Traveler to consider it important that a destination is safe with no health concerns or that the culture and language are familiar.

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. Relative to the average U.S. Pleasure Traveler, Downhill Skiers and Snowboarders are much more likely to begin planning their vacations (and especially winter vacations), by considering what activities they would like to do. In the summer they are more likely than the average U.S. Pleasure Traveler to look for package deals with no particular destination in mind.

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

	Downhill Skiers / Snowboarders	Non-Downhill Skiers / Snowboarders	Pleasure Travelers	Index
Size of Market	13,702,969	156,807,272	170,510,241	100
Summer				
Started with a desired destination in mind	56.2%	58.4%	58.2%	97
Started by considering specific activities wanted to do	12.2%	9.7%	9.9%	123
Started with a certain type of vacation experience in mind	17.2%	17.3%	17.3%	99
Looked for packaged deals - no destination in mind	1.9%	1.0%	1.1%	166
Considered something else first	4.9%	4.5%	4.6%	107
Don't know / Other	7.6%	9.0%	8.9%	86
Winter				
Started with a desired destination in mind	47.3%	60.5%	58.9%	80
Started by considering specific activities wanted to do	32.9%	8.4%	11.3%	292
Started with a certain type of vacation experience in mind	10.0%	15.4%	14.8%	68
Looked for packaged deals - no destination in mind	0.7%	1.5%	1.4%	52
Considered something else first	2.3%	5.7%	5.3%	43
Don't know / Other	6.8%	8.5%	8.3%	83

Trip Planning and Information Sources Consulted

Most Downhill Skiers and Snowboarders are solely (43.3%) or partially responsible (15.5%) for planning vacations. The most frequently consulted source of information is the Internet, followed by their own past experiences and the advice of family and friends. Relative to the average U.S. Pleasure Traveler, Downhill Skiers and Snowboarders are much more likely to obtain vacation travel information from travel guide books (e.g., Fodor's), electronic newsletters, trade, travel or sports shows and travel agents.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Downhill Skiers / Snowboarders	Non-Downhill Skiers / Snowboarders	Pleasure Travelers	Index
Size of Market		13,702,969	156,807,272	170,510,241	100
Who Plans Trips?	Respondent plans trips	43.3%	38.8%	39.2%	111
	Trip planning a shared responsibility	15.6%	17.8%	17.6%	89
	Someone else plans trips	41.1%	43.4%	43.2%	95
Information Sources Consulted	An Internet website	90.9%	74.6%	76.0%	120
	Past experience / Been there before	61.7%	53.8%	54.5%	113
	Advice of others / Word-of-mouth	57.9%	44.2%	45.4%	128
	Maps	36.9%	32.3%	32.7%	113
	An auto club such as AAA	27.2%	23.7%	24.0%	113
	Official travel guides or brochures from state / province	26.5%	20.0%	20.6%	129
	A travel agent	26.2%	18.0%	18.6%	141
	Visitor information centres	25.5%	19.9%	20.4%	125
	Articles in newspapers / magazines	24.2%	17.6%	18.1%	134
	Travel guide books such as Fodor's	22.0%	11.1%	12.0%	183
	Travel information received in the mail	16.2%	15.7%	15.8%	103
	Advertisements in newspapers / magazines	13.9%	10.6%	10.9%	128
	An electronic newsletter or magazine received by e-mail	10.7%	5.6%	6.0%	178
	Programs on television	10.3%	6.8%	7.1%	144
	Advertisements on television	4.3%	4.0%	4.0%	109
Visits to trade, travel or sports shows	3.6%	2.3%	2.4%	147	

Use of the Internet to Plan and Arrange Trips

The Internet is a very important travel planning tool for Downhill Skiers and Snowboarders. Most (85.3%) use the Internet when planning trips and over two-thirds (68.2%) have booked at least part of a trip online.

Most Downhill Skiers and Snowboarders use travel planning / booking sites such as Expedia, as well as hotel and airline websites. The majority have booked airline tickets, accommodations and car rentals over the Internet. Downhill Skiers and Snowboarders are also more likely than the average U.S. Pleasure Traveler to have used the Internet to purchase vacation packages as well as rail, bus or boat / ship fares.

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

		Downhill Skiers / Snowboarders	Non-Downhill Skiers / Snowboarders	Pleasure Travelers	Index
	Size of Market	13,702,969	156,807,272	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	14.8%	32.4%	31.0%	48
	Uses Internet to plan trips only	17.0%	20.4%	20.1%	84
	Uses Internet to book part of trip	68.2%	47.2%	48.9%	139
Types of Websites Consulted	A travel planning / booking website	70.5%	54.0%	55.6%	127
	A website of a hotel or resort	64.0%	52.1%	53.3%	120
	An airline's website	60.6%	43.9%	45.6%	133
	A tourism website of a country / region / city	39.7%	34.6%	35.1%	113
	A website of an attraction	39.2%	32.7%	33.4%	117
	Some other website	29.0%	24.6%	25.1%	116
	A cruise line website	15.9%	12.0%	12.4%	128
	A motorcoach website	1.9%	1.3%	1.3%	144
Parts of Trips Booked Over The Internet	Air tickets	83.9%	68.9%	70.6%	119
	Accommodations	77.4%	71.2%	71.9%	108
	Car rental	50.0%	36.4%	38.0%	132
	Tickets or fees for specific activities or attractions	33.9%	25.4%	26.3%	129
	A package containing two or more items	26.0%	16.8%	17.8%	146
	Tickets for rail, bus or boat / ship fares	16.6%	11.3%	11.9%	140
	Other	3.3%	2.9%	2.9%	113

Media Consumption Habits

Downhill Skiers and Snowboarders are avid consumers of sports-related programming. They are more likely than the average U.S. Pleasure Traveler to read sports-related magazines, visit sports websites, listen to all-sports radio programs, and watch sports and sport-programming on television. They are also more interested than the average U.S. Pleasure Traveler in modern / alternative rock and Top 40 / current hits radio. The majority of Downhill Skiers and Snowboarders also visit travel-related websites, although they are no more likely than the average U.S. Pleasure Traveler to read travel magazines or the travel section of the newspaper or to watch travel-related programming on television.

Fig. 18 Media Consumption Habits

		Downhill Skiers / Snowboarders	Non-Downhill Skiers / Snowboarders	Pleasure Travelers	Index
Size of Market		13,702,969	156,807,272	170,510,241	100
Newspaper Readership	Reads daily newspaper	54.1%	60.4%	59.9%	90
	Reads weekend edition of newspaper	51.1%	55.9%	55.5%	92
	Reads local neighbourhood or community newspapers	43.6%	50.1%	49.5%	88
	Reads other types of newspapers	15.5%	13.7%	13.9%	112
	Frequently or occasionally reads travel section of daily newspaper	42.3%	43.0%	43.0%	99
	Frequently or occasionally reads travel section of weekend newspaper	49.9%	49.3%	49.3%	101
Types of Magazines Read (Top 5 Indexed)	Outdoor activities / sports	20.5%	9.9%	10.7%	191
	Professional sports	20.6%	11.9%	12.6%	163
	Business, finance and investing	21.6%	13.3%	14.0%	155
	Magazines about your city	10.6%	6.6%	6.9%	153
	Computers, electronics and technology	18.1%	11.9%	12.4%	146
Type of Television Programs Watched (Top 5 Indexed)	Late night talk shows	32.0%	26.6%	27.1%	118
	Sports / sports shows	52.2%	44.4%	45.0%	116
	Music / Music video shows / channels	32.0%	27.7%	28.1%	114
	Reality shows (e.g., American Idol)	44.9%	39.1%	39.5%	114
	Situation comedies (e.g., Friends)	55.8%	51.1%	51.5%	108
Type of Radio Programs Listened To (Top 5 Indexed)	Modern rock/Alternative rock	49.3%	31.5%	32.9%	150
	All sports	17.8%	11.4%	11.9%	149
	Top 40 / Current hits	37.4%	25.1%	26.1%	143
	Multicultural	6.3%	4.6%	4.7%	134
	News / Talk / Information	36.4%	32.1%	32.4%	112
Types of Websites Visited (Top 5 Indexed)	Sports	41.0%	28.8%	30.0%	137
	Travel	60.7%	46.6%	48.0%	127
	Network news sites (e.g., CNN)	46.4%	37.9%	38.7%	120
	Magazine sites	17.6%	14.5%	14.8%	119
	Entertainment	63.2%	52.8%	53.7%	118

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