

U.S. TRAVEL MARKET

**Snowmobiling and ATViing While on Trips
Of One or More Nights**

A Profile Report

April 25, 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, 5.5% (12,162,091) of adult Americans participated in snowmobile or all-terrain vehicle (ATV) activities while on an out-of-town, overnight trip of one or more nights. A sameday ATV excursion (4.2%) was the most popular activity, followed by sameday snowmobiling on an organized trail (1.4%), an overnight touring trip by ATV (0.8%), and a snowmobile touring trip (0.3%). Among those who went snowmobiling or ATViing, 34.1% (4,142,748) reported that this activity was the main reason for taking at least one trip.

Snowmobile and ATVers tend to be male and 18 to 44 years of age. Relative to the average U.S. Pleasure Traveler, they are more likely to be married and have children under 18 living at home. Household income is above-average and they are more likely to have a trade or technical education. They are over-represented in Alaska and the Mountain, Pacific, West North Central, West South Central and the East North Central regions of the United States.

Over the past two years, Snowmobile and ATVers traveled more frequently than the average U.S. Pleasure Traveler and they were more likely to have taken a trip to Canada (20.2% versus 14.6%). The most common destinations were Ontario, British Columbia and Quebec. Moreover, they are over-represented among U.S. Pleasure Travelers to all Canadian provinces and territories.

Snowmobile and ATVers are dedicated outdoor enthusiasts and were much more likely than the average U.S. Pleasure Traveler to have participated in a full range of outdoor activities while on a trip. They were especially more likely to participate in hunting, extreme skiing and extreme air sports, motorcycling, and cross-country skiing and snowshoeing. Their preference for particular culture and entertainment activities while on trips reflects this outdoor orientation (e.g., equestrian and western events, agro-tourism). This segment was also more likely than average to go on cruises and tours.

A wilderness setting while traveling is particularly appealing to Snowmobile and ATVers. In the past two years, they were much more likely than average to have stayed at a wilderness campsite and at a remote or fly-in wilderness lodge or outpost. They also were much more likely to have gone on a wilderness tour.

Most Snowmobile and ATVers use the Internet for trip planning and have booked at least part of a trip online in the past two years. They are more likely than average to consult a travel agent. Their media preferences are clearly oriented towards outdoor recreation and motorsports, such as outdoor activity and sports magazines, automobile and cycle magazines, and websites relating to their specific activities and interests.

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 snowmobiling or ATVing 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.

Snowmobile & ATVing While on Trips

Market Incidence

Over the last two years, 5.5% (12,162,091) of adult Americans participated in snowmobile or all-terrain vehicle (ATV) activities while on an out-of-town, overnight trip of one or more nights. A sameday excursion by ATV (4.2%) was the most popular activity, followed by sameday snowmobiling on an organized trail (1.4%), an ATV overnight touring trip (0.8%) and a snowmobile overnight touring trip (0.3%).

Of those who participated in Snowmobile and ATV activities while on trips, 34.1% (4,142,748) reported that this activity was the main reason for taking at least one trip in the past two years. An overnight snowmobile touring trip (70.0%) was more likely to have been the main reason for taking a trip than an ATV overnight touring trip (47.1%), or sameday excursions by snowmobile (48.5%) or ATV (27.7%).

Fig. 1 Incidence of Snowmobile & ATVing While on Trips¹

	Number of Snowmobile and ATVers ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total U.S. Population ⁵
Size of Market	12,162,091	4,142,748	170,510,241	222,846,268
Snowmobiling and ATVing (All Activities)	12,162,091	34.1%	7.1%	5.5%
ATV sameday excursion	9,306,407	27.7%	5.5%	4.2%
Snowmobile day use on organized trail	3,199,961	48.5%	1.9%	1.4%
ATV overnight touring trip	1,744,264	47.1%	1.0%	0.8%
Snowmobile overnight touring trip	638,444	70.0%	0.4%	0.3%
Participated in all four activities	141,323	43.9%	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 - "Snowmobile and ATVers" are defined as individuals who participated in snowmobiling or ATVing while on an out-of-town trip of one or more nights during the past two years and who took at least one out-of-town pleasure trip of one or more nights during the past two years. This column reports the number of individuals who participated in the activity on at least one trip during the last two years.
- 3 - This column reports the percent who participated in each activity who stated that the activity was the main reason for taking at least one trip during the past two years.
- 4 - "Pleasure Travelers" are defined as individuals who have taken at least one out-of-town pleasure trip of one or more nights in the last two years. This column reports the percent of Pleasure Travelers who participated in each activity on at least one trip during the last two years.
- 5 - This column reports the percent of the Total U.S. Adult Market who participated in each activity on a trip during the past two years.

Incidence by Region, State and Population Size

Those who participate in Snowmobile & ATVing while on trips tend to be over-represented relative to the average U.S. Pleasure Traveler among those living in Alaska and the Mountain, Pacific, West North Central, West South Central and East North Central regions of the United States. They tend to live in small cities (population 100,000 to 499,999), or towns and rural areas (population less than 100,000).

Fig. 2 Geographic Distribution & Population Size of Those Who Went Snowmobile & ATVing While on Trips

	Total Population	Estimated Number Who Went Snowmobile & ATVing	Percent of Pleasure Travelers in Region Went Snowmobile & ATVing on a Trip	Percent of Total Regional Population Went Snowmobile & ATVing on a Trip
United States	222,846,268	12,162,091	7.1%	5.5%
New England	11,095,629	458,603	5.4%	4.1%
Middle Atlantic	31,005,526	1,395,466	6.1%	4.6%
East North Central	34,621,254	1,926,467	7.2%	5.6%
West North Central	15,024,360	979,016	8.1%	6.5%
South Atlantic	42,602,998	1,502,741	4.7%	3.6%
East South Central	13,597,436	462,884	4.8%	3.5%
West South Central	24,853,901	1,348,344	7.4%	5.4%
Mountain	15,030,720	1,567,531	12.9%	10.4%
Pacific	34,529,689	2,397,078	8.6%	7.0%
Alaska	484,754	123,961	29.4%	25.6%
Not Available	745,757	132,803	21.4%	17.8%
Less than 100,000	29,429,442	1,678,652	8.1%	5.7%
100,000 to 499,999	36,551,501	2,100,105	7.7%	5.8%
500,000 to 1,999,999	52,335,815	2,566,245	6.4%	4.9%
2,000,000 or more	103,783,753	5,684,286	6.9%	5.5%

Snowmobile and ATVers are most likely to live in Alaska, Idaho, Utah, Wyoming, Montana, Minnesota, Colorado and Wisconsin. They are least likely to reside in Alabama, Rhode Island, Delaware, District of Columbia, Kansas, Kentucky and South Carolina (see Fig. 3 on next page).

Fig. 3 Those Who Went Snowmobile & ATVing While on Trips by U.S. State

Region	State	Population of State	Estimated Number Snowmobile and ATVerers	Percent of Pleasure Travelers in State	Percent of State Population
United States	All States	222,846,268	12,162,091	7.1%	5.5%
New England	Connecticut	2,685,692	97,496	4.7%	3.6%
	Maine	1,047,770	58,742	8.1%	5.6%
	Massachusetts	4,423,562	193,934	5.5%	4.4%
	New Hampshire	1,604,344	60,073	5.0%	3.7%
	Rhode Island	837,445	26,453	3.8%	3.2%
	Vermont	496,816	21,905	5.7%	4.4%
Middle Atlantic	New Jersey	6,708,501	301,956	5.8%	4.7%
	New York	14,727,054	687,880	6.2%	4.8%
	Pennsylvania	9,569,972	405,630	5.9%	4.3%
East North Central	Illinois	9,521,097	479,252	6.4%	5.1%
	Indiana	4,717,624	167,677	4.7%	3.6%
	Michigan	7,709,890	566,743	9.5%	7.4%
	Ohio	8,412,962	315,919	5.1%	3.9%
	Wisconsin	4,259,682	396,877	11.5%	9.3%
West North Central	Iowa	2,262,393	85,928	4.8%	3.8%
	Kansas	2,304,474	72,824	4.1%	3.2%
	Minnesota	3,946,220	459,801	13.6%	11.7%
	Missouri	4,138,758	202,185	6.3%	4.9%
	Nebraska	1,304,361	73,344	7.0%	5.6%
	North Dakota	488,140	38,575	9.4%	7.9%
	South Dakota	580,015	46,358	10.3%	8.0%
South Atlantic	Delaware	646,427	19,492	4.0%	3.0%
	District of Columbia	521,285	14,199	4.1%	2.7%
	Florida	13,937,467	501,596	4.7%	3.7%
	Georgia	6,668,302	243,374	4.8%	3.6%
	Maryland	3,428,206	127,985	4.8%	3.7%
	North Carolina	6,651,453	219,242	4.5%	3.3%
	South Carolina	3,241,944	99,674	4.2%	3.1%
	Virginia	5,957,159	204,907	4.5%	3.4%
	West Virginia	1,550,755	72,272	8.3%	4.7%
East South Central	Alabama	3,431,591	89,529	3.7%	2.6%
	Kentucky	3,447,277	102,571	4.2%	3.2%
	Mississippi	2,156,793	74,774	5.4%	3.5%
	Tennessee	4,561,775	196,010	5.9%	4.3%
West South Central	Arkansas	2,103,346	117,090	8.2%	5.6%
	Louisiana	3,367,908	216,096	9.6%	6.4%
	Oklahoma	2,643,565	136,955	7.3%	5.2%
	Texas	16,739,082	878,203	7.0%	5.3%
Mountain	Arizona	4,451,660	298,187	8.5%	6.7%
	Colorado	3,501,822	335,665	11.6%	9.6%
	Idaho	1,044,920	179,505	21.8%	17.2%
	Montana	726,027	107,059	17.8%	14.7%
	Nevada	1,809,582	165,459	11.4%	9.1%
	New Mexico	1,433,596	121,262	11.0%	8.5%
	Utah	1,671,322	294,517	21.0%	17.7%
	Wyoming	391,790	65,877	19.8%	16.8%
Pacific	Alaska	484,754	123,961	29.4%	25.6%
	California	26,965,837	1,871,434	8.5%	7.0%
	Oregon	2,793,303	228,507	10.6%	8.3%
	Washington	4,770,549	297,138	7.8%	6.3%

Demographic Profile

Snowmobile and ATVers tend to be male and between the ages of 18 and 44. They are slightly more likely than the average U.S. Pleasure Traveler to be married and to have dependent children (less than 18) living at home. This segment is also more likely than the average U.S. Pleasure Traveler to have a trade or technical school education, and their household income tends to be above-average.

Fig. 4 Demographic Profile of Snowmobile and ATVers Relative to All U.S. Pleasure Travelers

Attribute	Size of Market	Snowmobile and ATVers	Non-Snowmobile and ATVers ¹	Pleasure Travelers	Index ²
		12,162,091	158,348,150	170,510,241	100
Gender	Male	55.6%	48.0%	48.5%	115
	Female	44.4%	52.0%	51.5%	86
Age of Respondent	18 to 24	17.0%	10.4%	10.8%	157
	25 to 34	28.4%	20.4%	21.0%	135
	35 to 44	20.3%	17.0%	17.3%	118
	45 to 54	18.8%	21.2%	21.0%	90
	55 to 64	10.4%	15.9%	15.5%	67
	65 Plus	5.0%	15.1%	14.4%	35
Average Age		39.0	45.9	45.4	N/A
Marital Status	Not married	29.3%	30.6%	30.5%	96
	Married	70.7%	69.4%	69.5%	102
Parental Status	No children under 18	65.2%	70.4%	70.0%	93
	Children under 18	34.8%	29.6%	30.0%	116
Education	High school or less	21.4%	20.4%	20.5%	104
	Trade, Technical, Community Col.	24.6%	21.1%	21.4%	115
	University Degree	41.7%	41.0%	41.1%	102
	Post Graduate Degree	12.3%	17.4%	17.1%	72
Household Income	Under \$20,000	6.5%	8.2%	8.1%	80
	\$20,000 to \$39,999	12.7%	16.5%	16.2%	78
	\$40,000 to \$59,999	15.5%	16.8%	16.7%	93
	\$60,000 to \$79,999	15.6%	14.6%	14.7%	106
	\$80,000 to \$99,999	13.6%	11.4%	11.6%	117
	\$100,000 to \$149,999	16.0%	14.2%	14.4%	111
	\$150,000 or more	9.8%	6.4%	6.7%	146
Not stated	10.5%	11.8%	11.7%	90	
Average Household Income		\$83,490	\$73,587	\$74,303	N/A

- 1 - "Non-Snowmobile and ATVers" 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 snowmobile or ATVing activities on any trip. The numbers of Snowmobile and ATVers and Non-Snowmobile and ATVers equal the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Snowmobile and ATVers in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Snowmobile and ATVers 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)

Snowmobile and ATVers traveled more frequently over the past two years than the average U.S. Pleasure Traveler. They were more likely than average to have taken trips within their own state and to have visited Mexico, the Caribbean and overseas destinations.

Snowmobile and ATVers were also more likely than the average U.S. Pleasure Traveler to have taken a trip to Canada in the past two years (20.2% versus 14.6%). They were especially likely to have taken a trip to Ontario (11.5%), British Columbia (7.0%) and Quebec (4.6%). In relative terms, they were considerably more likely than average to have visited all of the Canadian provinces or territories, especially the Yukon, Newfoundland and Labrador, Saskatchewan, Manitoba and the Northwest Territories.

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

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travelers	Index
Size of Market	12,162,091	158,348,150	170,510,241	100
All destinations	94.7%	84.7%	85.4%	111
Canada	20.2%	14.1%	14.6%	139
Newfoundland and Labrador	1.0%	0.4%	0.4%	240
Prince Edward Island	0.9%	0.6%	0.6%	151
New Brunswick	1.0%	0.8%	0.8%	125
Nova Scotia	1.5%	1.3%	1.3%	113
Quebec	4.6%	3.0%	3.1%	149
Ontario	11.5%	8.0%	8.3%	139
Manitoba	1.1%	0.5%	0.5%	210
Saskatchewan	1.1%	0.4%	0.5%	234
Alberta	2.0%	1.1%	1.2%	171
British Columbia	7.0%	3.9%	4.1%	168
Yukon	1.5%	0.5%	0.6%	262
Northwest Territories	0.7%	0.4%	0.4%	183
Nunavut	0.1%	0.0%	0.0%	144
Own State	90.7%	78.9%	79.7%	114
Other parts of the U.S.	92.8%	90.4%	90.6%	102
Mexico	25.7%	12.7%	13.6%	189
Caribbean	19.0%	12.3%	12.7%	149
All other destinations	12.8%	9.3%	9.6%	134

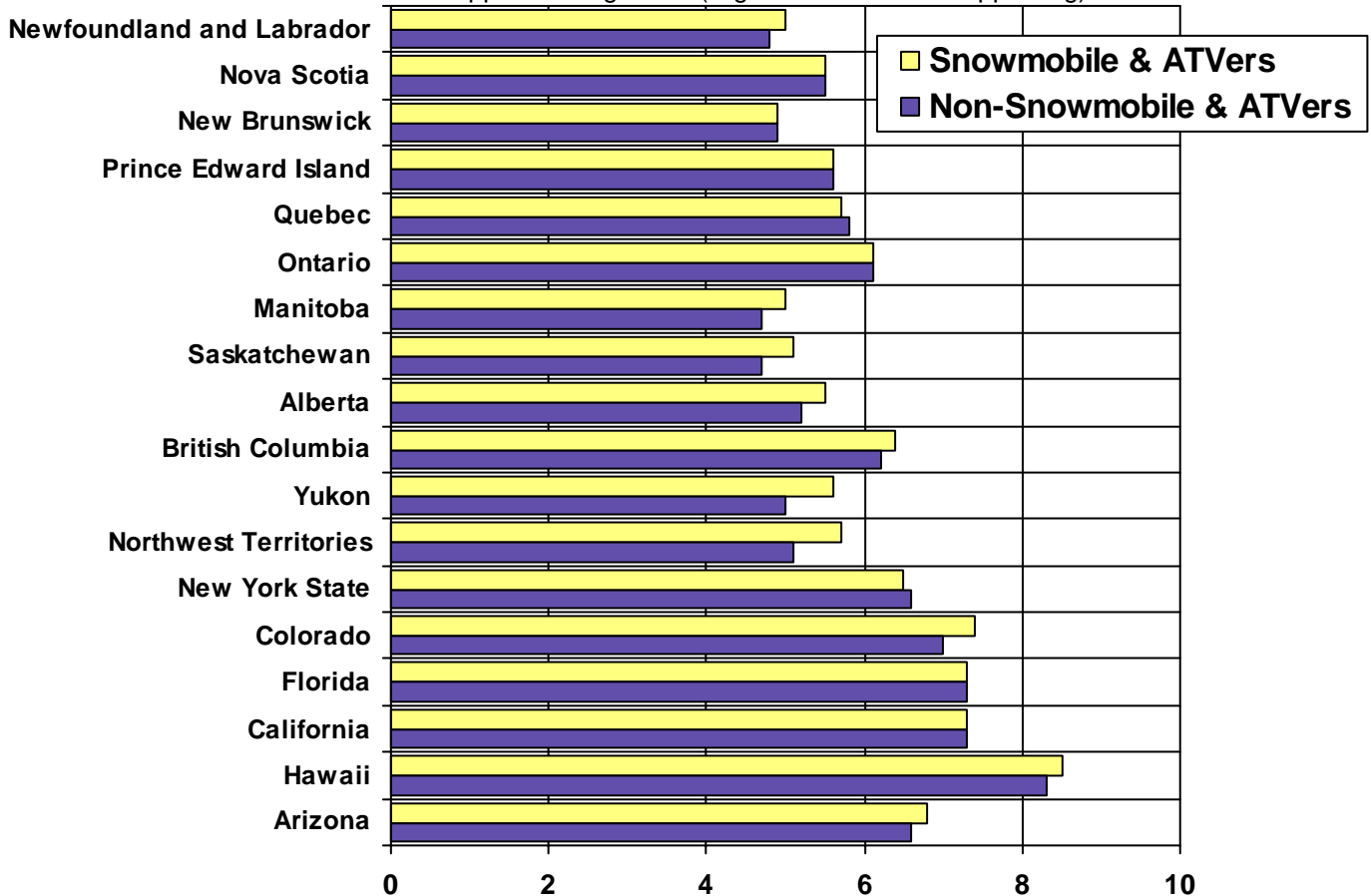
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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 Snowmobile and ATVers tended to be similar to the ratings of other U.S. Pleasure Travelers for the eastern provinces, but were higher for the western provinces and territories. British Columbia (6.4) received the highest rating.

U.S. Pleasure Travelers as a whole (both Snowmobile and ATVers and Non-Snowmobile and ATVers) rated the six reference U.S. states as more appealing than any of the Canadian provinces or territories. Hawaii (8.5) received the highest rating among Snowmobile and ATVers.

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

Snowmobile and ATVers were much more likely than the average U.S. Pleasure Traveler to have participated in a full range of outdoor activities while on trips. Most Snowmobile and ATVers participated in ocean activities while on at least one trip in the past two years. Relative to the average U.S. Pleasure Traveler, Snowmobile and ATVers were especially more likely to have engaged in hunting, extreme skiing, extreme air sports, motorcycling, cross-country skiing and snowshoeing, and 'board & blade' activities (e.g., ice skating, skateboarding) when on trips.

In part, these patterns reflect the fact that this segment consists primarily of young males with above-average incomes; 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)

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travelers	Index
Size of Market	12,162,091	158,348,150	170,510,241	100
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	59.2%	38.1%	39.6%	150
Wildlife Viewing	49.9%	33.8%	34.9%	143
Boating & Swimming (e.g., motorboating, swimming in lakes)	47.1%	19.0%	21.0%	224
Hiking, Climbing & Paddling	43.9%	21.9%	23.5%	187
Fishing	42.2%	16.6%	18.4%	229
Games & Individual Sports (e.g., tennis, board games)	36.6%	21.1%	22.2%	165
Exercising and Jogging	23.1%	13.4%	14.1%	164
Downhill Skiing & Snowboarding	22.9%	6.9%	8.0%	285
Hunting	22.6%	4.1%	5.4%	419
Golfing	18.7%	10.1%	10.7%	175
Horseback Riding	17.8%	5.3%	6.2%	289
Team Sports (e.g., football, baseball, basketball)	16.6%	7.2%	7.9%	210
Cycling	15.4%	5.6%	6.3%	243
Board & Blade (e.g., ice skating, skateboarding)	12.3%	3.4%	4.0%	306
Motorcycling	12.1%	2.4%	3.1%	396
Sailing and Surfing (e.g., sailing, windsurfing, parasailing)	11.9%	4.2%	4.8%	249
Scuba & Snorkelling	11.7%	3.5%	4.1%	287
Cross-country Skiing & Snowshoeing	6.5%	1.5%	1.9%	349
Extreme Air Sports (e.g., parachuting, bungee jumping)	5.9%	1.4%	1.7%	343
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	1.9%	0.2%	0.3%	565

Outdoor Activities Pursued While Not on Trips

The very high level of outdoor activity among Snowmobile and ATVers while on trips is also apparent when they are NOT traveling. Other than ATVing, the majority of Snowmobile and ATVers went on day outings to parks, went swimming, exercised at home or at a fitness club, gardened at home, went picnicking, went fishing and went camping. In addition to snowmobiling, this segment was also more likely than the average U.S. Pleasure Traveler to include hunting, skateboarding, snowboarding, downhill skiing, canoeing and kayaking, and horseback riding among their activities when not on a trip.

Fig. 8 Outdoor Activities Pursued While NOT on Trips

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travelers	Index
Size of Market	12,162,091	158,348,150	170,510,241	100
Day outing to a park	68.9%	62.7%	63.1%	109
Swimming	68.2%	55.6%	56.5%	121
Exercising at home or at a fitness club	59.8%	55.8%	56.0%	107
Gardening	54.1%	53.0%	53.1%	102
Picnicking	52.5%	47.4%	47.7%	110
Fishing	51.3%	31.3%	32.8%	157
Camping	50.7%	24.8%	26.7%	190
Riding an all-terrain vehicle (ATV)	50.2%	8.5%	11.5%	437
Hiking	44.9%	31.5%	32.5%	138
Sailing or other boating	37.2%	18.6%	20.0%	187
Cycling	31.9%	22.2%	22.9%	139
Hunting	30.3%	10.3%	11.8%	258
Jogging	26.9%	18.9%	19.5%	138
Playing team sports	25.9%	15.0%	15.8%	164
Hunting	25.3%	17.7%	18.3%	138
Snowmobiling	19.3%	2.1%	3.3%	583
Playing racquet sports (e.g., tennis or badminton)	18.8%	12.8%	13.2%	143
Horseback riding	17.2%	7.9%	8.6%	200
Canoeing or kayaking	16.5%	7.2%	7.8%	210
Downhill skiing	13.1%	5.1%	5.7%	230
Rollerblading	12.1%	7.0%	7.3%	165
Ice-skating	10.1%	5.1%	5.5%	184
Snowboarding	9.1%	2.2%	2.7%	338
Skateboarding	6.4%	1.9%	2.2%	294
Cross-country skiing	5.0%	2.3%	2.5%	198

Culture and Entertainment Activities Pursued While on Trips

The majority of Snowmobile and ATVers went shopping and dining, visited theme parks and exhibits, visited historical sites, museums and art galleries, attended casino, theatre and comedy clubs, and visited fairs and festivals when on trips. Relative to the average U.S. Pleasure Traveler, Snowmobile & ATVers were much more likely to engage in culture and entertainment activities on nature-oriented trips. For example, Snowmobile and ATVers were twice as likely as the average to attend equestrian and western events, and to participate in agro-tourism. This segment is also much more likely than average to participate in sports-oriented activities (e.g., amateur tournaments, national & international sporting events, professional sporting events), rock concerts and recreational dancing, and theatre, film and music festivals.

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

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travelers	Index
Size of Market	12,162,091	158,348,150	170,510,241	100
Shopping and Dining	82.5%	77.3%	77.7%	106
Theme Parks & Exhibits	61.2%	48.0%	49.0%	125
Historical Sites, Museums & Art Galleries	60.4%	52.9%	53.5%	113
Casino, Theatre and Comedy Clubs	60.1%	44.3%	45.4%	132
Fairs and Festivals	57.1%	39.7%	41.0%	139
Fine Dining and Spas	43.7%	32.1%	33.0%	133
Science and Technology Exhibits	35.4%	24.0%	24.8%	143
Wine, Beer and Food Tastings	32.5%	22.2%	22.9%	142
Equestrian & Western Events	30.5%	14.3%	15.5%	197
Rock Concerts and Recreational Dancing	27.8%	14.3%	15.3%	182
Professional Sporting Events	25.7%	15.4%	16.1%	160
Agro-Tourism	25.3%	12.6%	13.5%	187
Garden Theme Attractions	19.1%	13.3%	13.7%	140
High Art Performances	15.7%	10.6%	10.9%	143
Theatre, Film & Musical Festivals	15.4%	7.8%	8.3%	185
Aboriginal Cultural Experiences	15.3%	8.1%	8.6%	178
Amateur Tournaments	14.6%	7.1%	7.7%	190
Archaeological Digs & Sites	9.3%	5.2%	5.5%	169
Participatory Historical Activities	6.8%	3.7%	3.9%	173
National & International Sporting Events	4.2%	1.7%	1.9%	228

Culture and Entertainment Activities Pursued While Not on Trips

Similar to the average U.S. Pleasure Traveler, most Snowmobile and ATVers went out to restaurants and visited festivals or fairs while NOT traveling. Snowmobile and ATVers were more likely than average to go to rodeos, and to live rock or pop music performances (e.g., bars with pop or rock bands, rock music concerts) when not on a trip. They were less likely than average to visit historic sites or heritage buildings, visit museums, attend live theatre performances, visit botanical gardens or attend classical music performances.

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

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travelers	Index
Size of Market	12,162,091	158,348,150	170,510,241	100
Going out to eat in restaurants	94.2%	92.7%	92.8%	102
Going to festivals or fairs	67.2%	65.3%	65.5%	103
Going to amateur sporting events	48.8%	39.2%	39.9%	122
Going to zoos or aquariums	48.5%	45.4%	45.6%	106
Going to amusement or theme parks	45.1%	37.6%	38.1%	118
Going to professional sporting events	44.7%	34.1%	34.9%	128
Going to historic sites or heritage buildings	39.3%	40.2%	40.1%	98
Going to bars with live pop or rock bands	37.0%	22.5%	23.6%	157
Going to gamble in casinos	35.3%	27.4%	28.0%	126
Going to museums	34.8%	37.7%	37.5%	93
Going to pick-your-own farms or farmers' market	33.5%	31.4%	31.6%	106
Going to rock music concerts	32.9%	20.4%	21.3%	155
Going dancing	29.9%	20.1%	20.8%	144
Going to live theatre	26.5%	29.4%	29.2%	91
Going to art galleries or art shows	24.3%	28.0%	27.8%	88
Going to rodeos	17.6%	7.5%	8.2%	214
Going to botanical gardens	17.3%	20.2%	20.0%	87
Staying overnight in a hotel or B&B in own city	15.1%	10.2%	10.6%	143
Going to day spas	15.0%	9.9%	10.3%	146
Going to classical music concerts	13.4%	15.0%	14.9%	90
Going to jazz clubs	9.6%	7.8%	7.9%	122
Going to the ballet	7.3%	7.0%	7.0%	104
Going to the opera	6.1%	5.7%	5.7%	107

Accommodations Stayed In While on Trips

Snowmobile and ATVers tended to stay at a public campground or at a seaside resort during trips taken in the past two years. Snowmobile and ATVers were much more likely than the average U.S. Pleasure Traveler to have camped in a wilderness area, or to have stayed at a remote or fly-in wilderness lodge or outpost. They were also much more likely to have stayed at a farm or guest ranch. Among the more specialized type of accommodation, they were more likely to have stayed on a houseboat, and attended a wine tasting school or a cooking school than the average U.S. Pleasure Traveler.

Fig. 11 Accommodations Stayed In While on Trips

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travelers	Index
Size of Market	12,162,091	158,348,150	170,510,241	100
A Public Campground in a National, State, Provincial or Municipal Park	44.2%	33.6%	34.8%	127
Seaside Resort	37.3%	37.8%	37.7%	99
Lakeside / Riverside Resort	31.5%	24.8%	25.6%	123
A Private Campground	28.0%	20.0%	20.9%	134
Ski Resort or Mountain Resort	27.0%	17.3%	18.4%	147
A Camp Site in a Wilderness Setting (Not a Campground)	21.7%	8.1%	9.6%	225
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	15.1%	7.9%	8.7%	173
Wilderness Lodge You Can Drive to by Car	12.0%	6.6%	7.2%	168
Farm or Guest Ranch	9.0%	3.5%	4.1%	219
Health Spa	8.8%	6.2%	6.5%	136
On a Houseboat	6.6%	2.5%	2.9%	223
Country Inn or Resort with Gourmet Restaurant	5.6%	3.9%	4.1%	138
Remote or Fly-In Wilderness Lodge	3.5%	1.5%	1.7%	205
Remote or Fly-In Wilderness Outpost	2.7%	0.7%	0.9%	295
Cooking School	2.5%	1.0%	1.2%	212
Wine Tasting School	2.2%	0.7%	0.9%	250

Tours and Cruises Taken During Past Two Years

Snowmobile and ATVers were more likely than the average U.S. Pleasure Traveler to have taken tours and cruises during the past two years. Snowmobile and ATVers were especially more likely to have taken a wilderness tour, and an air tour. Among the various cruises, they were more likely than the average U.S. Pleasure Traveler to have taken an Alaskan cruise, a Great Lakes cruise, a submarine cruise and a St. Lawrence River cruise.

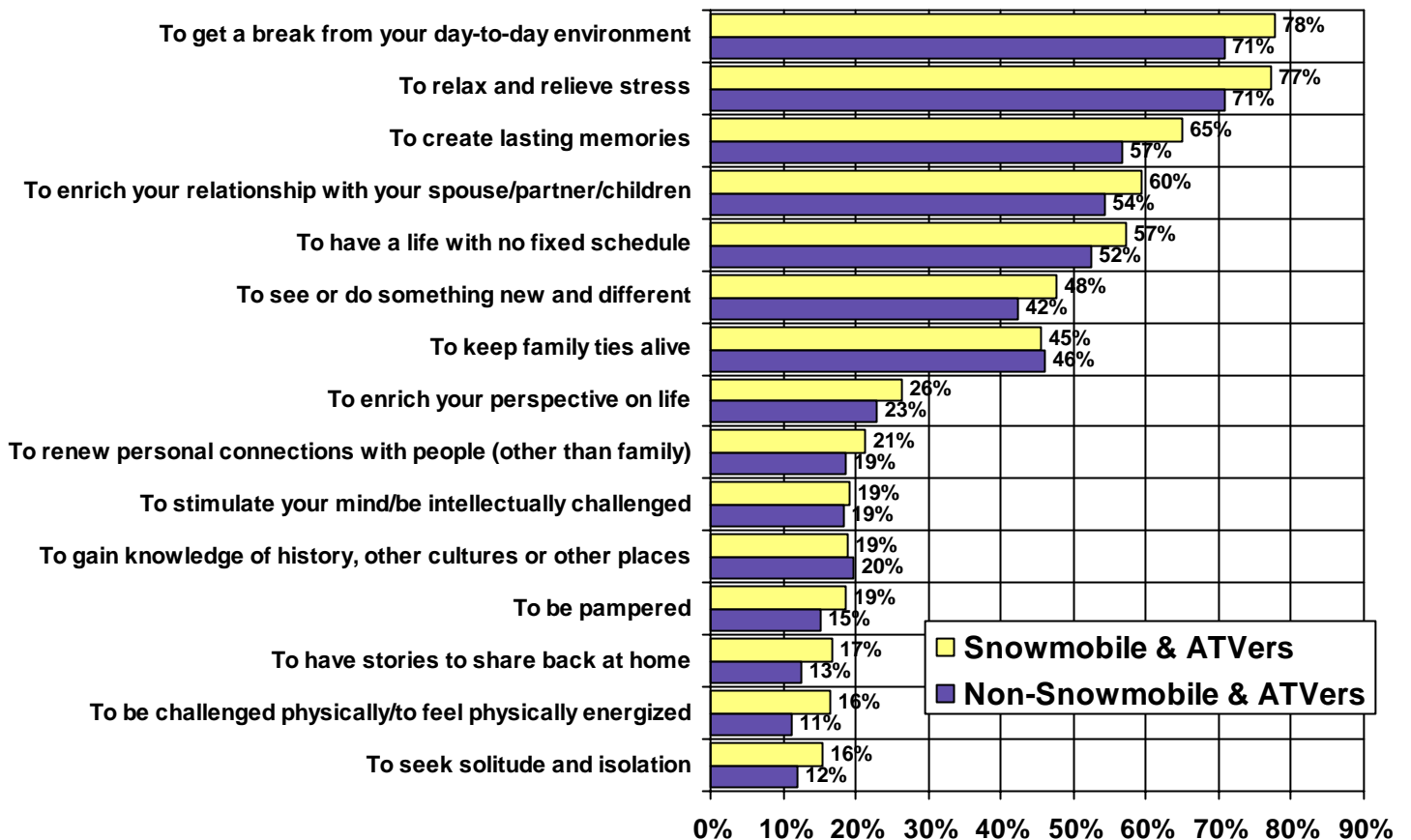
Fig. 12 Tours and Cruises Taken During Past Two Years

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travelers	Index
Size of Market	12,162,091	158,348,150	170,510,241	100
A self guided sameday tour while on an overnight trip	26.8%	18.6%	19.2%	139
An organized sameday guided tour while on an overnight trip	23.9%	18.1%	18.5%	129
Around the city	20.0%	15.4%	15.8%	127
Around the country side - scenic drives	19.6%	12.6%	13.1%	150
Wilderness tour	16.1%	6.8%	7.4%	217
A self guided overnight tour where you stayed in different locations	15.6%	10.0%	10.4%	150
Caribbean ocean cruise	13.2%	8.7%	9.0%	146
On the water (sightseeing cruise)	12.6%	7.4%	7.8%	162
Some other type of tour	12.0%	8.6%	8.8%	136
An organized overnight guided tour where you stayed in different locations	10.6%	7.7%	7.9%	135
An organized overnight guided tour where you stayed in a single location	10.3%	6.5%	6.7%	154
To a casino	7.9%	4.7%	4.9%	162
Ocean cruise - Other	7.2%	4.6%	4.8%	150
To a winery	5.7%	3.4%	3.6%	160
Alaskan ocean cruise	4.3%	2.4%	2.5%	173
In the air as a pilot or passenger of an airplane or helicopter	3.9%	1.2%	1.4%	274
Cruise on another lake or river	3.0%	1.9%	2.0%	154
Some other type of cruise	3.0%	1.6%	1.7%	177
To a factory	2.7%	1.8%	1.8%	148
Great Lakes cruise	1.4%	0.3%	0.4%	354
Submarine cruise	0.7%	0.2%	0.2%	302
Cruise on the St. Lawrence River	0.6%	0.3%	0.3%	198

Benefits Sought While on Vacation

Most Snowmobile and ATVers take a vacation in order to get a break from their day-to-day environment, relax and relieve stress, create lasting memories, enrich family relationships and live without a fixed schedule. Moreover, this segment is more likely than other U.S. Pleasure Travelers to place high importance on each of these vacation benefits. Snowmobile and ATVers are also more likely than the average U.S. Pleasure Traveler to consider it important that a destination allow them to see or do something new or different and to be physically challenged or energized.

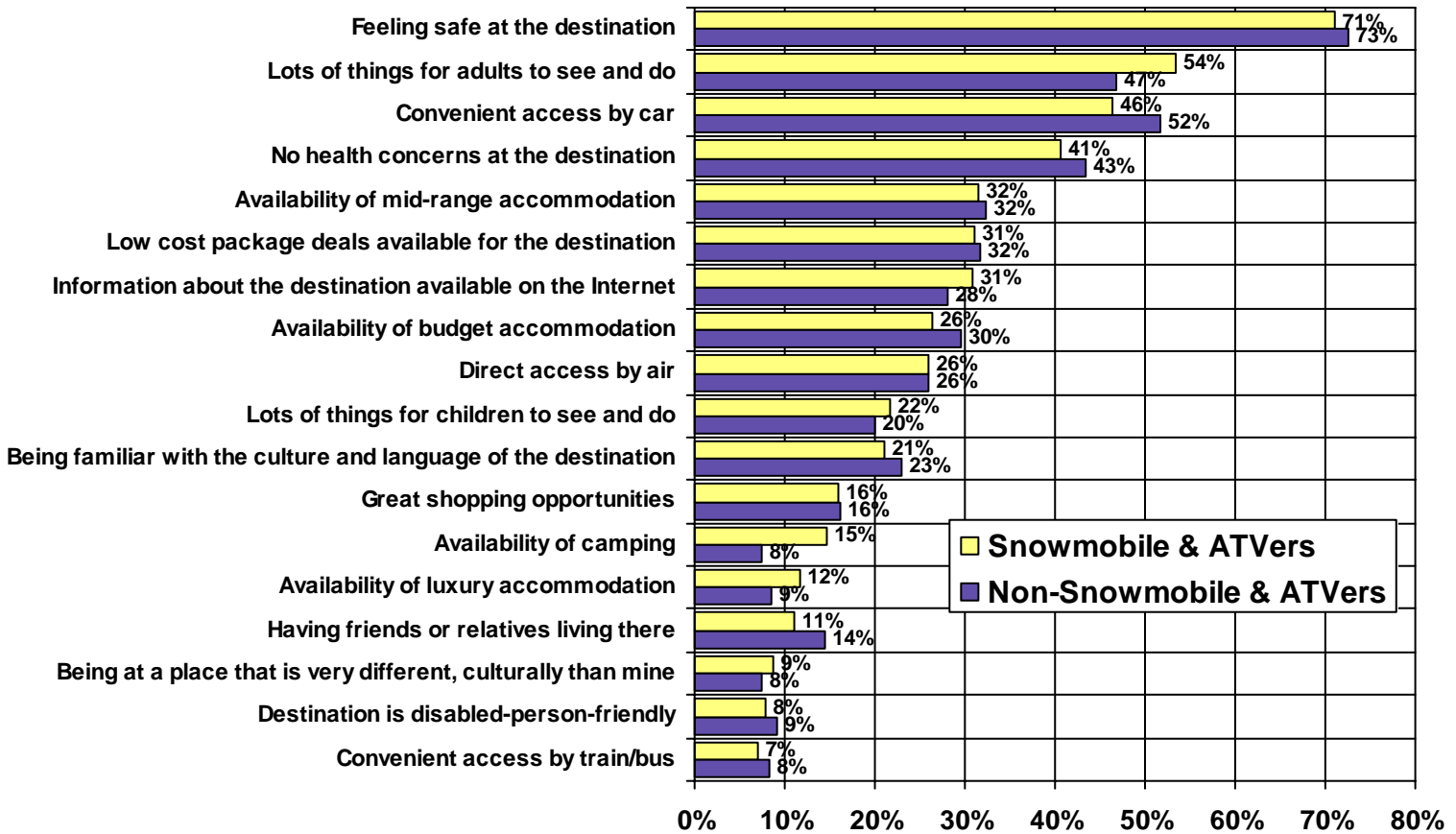
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

The majority of Snowmobile and ATVers consider it important that they feel safe at a destination and have lots of things for adults to see and do. Relative to the average U.S. Pleasure Travelers, having lots of things to see and do and having camping available are particularly important attributes for Snowmobile and ATVers. They are less likely than the average U.S. Pleasure Traveler to consider it important that a destination is conveniently accessible by car.

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



How Destinations Are Selected

Respondents were asked a series of questions concerning how they select destinations. Similar to the average U.S. Pleasure Traveler, most Snowmobile and ATVer start with a particular destination in mind. However, they are more likely than the average U.S. Pleasure Traveler to start their vacation planning by considering the specific activities they would like to do while on vacation (especially for winter trips). They are also more likely than average to look for package deals without having a specific destination in mind.

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

	Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travelers	Index
Size of Market	12,162,091	158,348,150	170,510,241	100
Summer				
Started with a desired destination in mind	56.0%	58.4%	58.2%	96
Started by considering specific activities wanted to do	12.3%	9.7%	9.9%	124
Started with a certain type of vacation experience in mind	19.2%	17.1%	17.3%	111
Looked for packaged deals - no destination in mind	1.8%	1.1%	1.1%	158
Considered something else first	3.7%	4.7%	4.6%	81
Don't Know/Other	7.0%	9.0%	8.9%	79
Winter				
Started with a desired destination in mind	54.2%	59.4%	58.9%	92
Started by considering specific activities wanted to do	20.1%	10.4%	11.3%	179
Started with a certain type of vacation experience in mind	12.8%	15.0%	14.8%	87
Looked for packaged deals - no destination in mind	1.9%	1.4%	1.4%	133
Considered something else first	3.4%	5.5%	5.3%	64
Don't Know/Other	7.5%	8.3%	8.3%	91

Trip Planning and Information Sources Consulted

Just over one-half of Snowmobile and ATVers (55.3%) participate in planning vacation trips. However, they are slightly more likely than the average U.S. Pleasure Traveler to leave trip planning to someone else.

When planning a trip, the most frequently consulted source of information is the Internet. Most Snowmobile and ATVers also rely on past experiences and the advice of family and friends. Relative to the average U.S. Pleasure Traveler, they are more likely to consult a travel agent when planning a trip, but less likely to consult an auto club (e.g., AAA). They are also more likely to obtain travel information from trade, travel and sports shows, television programs and advertising, and newspaper or magazine articles and advertising.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travelers	Index
Size of Market		12,162,091	158,348,150	170,510,241	100
Who Plans Trips?	Respondent plans trips	38.0%	39.3%	39.2%	97
	Trip planning a shared responsibility	17.3%	17.6%	17.6%	98
	Someone else plans trips	44.8%	43.1%	43.2%	104
Information Sources Consulted	An Internet website	80.8%	75.6%	76.0%	106
	Past experience / Been there before	58.9%	54.1%	54.5%	108
	Advice of others / Word-of-mouth	55.4%	44.6%	45.4%	122
	Maps	35.3%	32.5%	32.7%	108
	A travel agent	25.1%	18.1%	18.6%	134
	Official travel guides or brochures from state / province	24.3%	20.3%	20.6%	118
	Articles in newspapers/magazines	23.4%	17.7%	18.1%	129
	Visitor information centres	23.1%	20.2%	20.4%	113
	An auto club such as AAA	22.0%	24.2%	24.0%	91
	Travel information received in the mail	18.1%	15.6%	15.8%	115
	Advertisements in newspapers/magazines	15.5%	10.5%	10.9%	142
	Travel guide books such as Fodor's	13.0%	11.9%	12.0%	108
	Programs on television	12.9%	6.7%	7.1%	181
	An electronic newsletter or magazine received by e-mail	7.7%	5.9%	6.0%	128
	Advertisements on television	6.6%	3.8%	4.0%	166
Visits to trade, travel or sports shows	6.1%	2.1%	2.4%	250	

Use of the Internet to Plan and Arrange Trips

Three-quarters of Snowmobile and ATVers use the Internet for planning a trip (75.6%) and just over one-half purchased at least part of a trip online (53.9%). The majority use travel planning / booking websites such as Expedia, and hotel or resort websites. They are also more likely than average to use the website of a motorcoach line.

Snowmobile and ATVers are more likely to book airline tickets or accommodations than other trip components over the Internet. They are more likely than the average U.S. Pleasure Traveler to have used the Internet for purchasing a vacation package.

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

		Snowmobile and ATVers	Non-Snowmobile and ATVers	Pleasure Travelers	Index
Size of Market		12,162,091	158,348,150	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	24.4%	31.5%	31.0%	79
	Uses Internet to plan trips only	21.7%	20.0%	20.1%	108
	Uses Internet to book part of trip	53.9%	48.5%	48.9%	110
Types of Websites Consulted	A travel planning / booking website	59.4%	55.3%	55.6%	107
	A website of a hotel or resort	55.2%	53.2%	53.3%	104
	An airline's website	47.9%	45.4%	45.6%	105
	A tourism website of a country / region / city	39.7%	34.7%	35.1%	113
	A website of an attraction	35.5%	33.2%	33.4%	106
	Some other website	28.9%	24.7%	25.1%	115
	A cruise line website	17.2%	12.0%	12.4%	139
	A motorcoach website	2.7%	1.2%	1.3%	200
Parts of Trips Booked Over The Internet	Air tickets	74.8%	70.2%	70.6%	106
	Accommodations	74.0%	71.7%	71.9%	103
	Car rental	42.3%	37.6%	38.0%	111
	Tickets or fees for specific activities or attractions	33.8%	25.7%	26.3%	128
	A package containing two or more items	27.2%	17.0%	17.8%	153
	Tickets for rail, bus or boat/ship fares	15.8%	11.5%	11.9%	133
	Other	4.4%	2.8%	2.9%	151

Media Consumption Habits

The media preferences of Snowmobile and ATVer reflect their twin interest in the outdoors and motor vehicles. They are much more likely than the average U.S. Pleasure Traveler to read outdoor activity and sport magazines, as well as automobile and motorcycle magazines, and to visit websites for their specific activities and interests. This segment is also more likely than average to show interest in sports (e.g., professional sports magazines, all-sports radio, sports-related websites). Their musical preferences tend to include modern or alternative rock and country music.

Fig. 18 Media Consumption Habits

		Snowmobile and ATVer	Non-Snowmobile and ATVer	Pleasure Travelers	Index
Size of Market		12,162,091	158,348,150	170,510,241	100
Newspaper Readership	Reads daily newspaper	56.2%	60.2%	59.9%	94
	Reads weekend edition of newspaper	51.9%	55.8%	55.5%	93
	Reads local neighbourhood or community newspapers	49.5%	49.6%	49.5%	100
	Reads other types of newspapers	15.0%	13.8%	13.9%	108
	Frequently or occasionally reads travel section of daily newspaper	43.5%	42.9%	43.0%	101
	Frequently or occasionally reads travel section of weekend newspaper	49.4%	49.3%	49.3%	100
Types of Magazines Read (Top 5 Indexed)	Outdoor activities/sports	22.5%	9.8%	10.7%	210
	Automobile and cycle magazines	31.8%	19.0%	20.0%	159
	Photography and video	6.0%	3.7%	3.9%	154
	Professional sports	18.3%	12.2%	12.6%	145
	Travel (e.g., Condé Nast)	14.9%	10.3%	10.6%	140
Type of Television Programs Watched (Top 5 Indexed)	Music/Music video shows/channels	36.9%	27.4%	28.1%	132
	Travel shows	34.2%	28.5%	28.9%	118
	Science & nature shows	43.1%	36.3%	36.8%	117
	Reality shows (e.g., American Idol)	45.8%	39.0%	39.5%	116
	Late night talk shows	30.7%	26.8%	27.1%	113
Type of Radio Programs Listened To (Top 5 Indexed)	Modern rock/Alternative rock	48.1%	31.7%	32.9%	146
	Country music	44.4%	31.5%	32.4%	137
	Top 40/Current hits	34.3%	25.5%	26.1%	132
	All sports	13.2%	11.8%	11.9%	111
	Some other radio program	20.7%	19.3%	19.4%	107
Types of Websites Visited (Top 5 Indexed)	Sites for specific activities or interests	43.9%	31.6%	32.5%	135
	Sports	34.5%	29.6%	30.0%	115
	Travel	53.6%	47.5%	48.0%	112
	Entertainment	58.7%	53.3%	53.7%	109
	Magazine sites	16.1%	14.7%	14.8%	109

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