

U.S. TRAVEL MARKET

**Visiting Theme Parks and Exhibits
While on Trips
Of One or More Nights**

A Profile Report

June 29, 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, 37.8% (83,501,751) of adult Americans visited theme parks and exhibits while on an out-of-town, overnight trip of one or more nights. An amusement park (26.0%) was visited most often, followed by a zoo (15.7%), an aquarium (15.7%), a water theme park (9.6%), a movie theme park (5.4%) and a wax museum (3.2%). 47.0% (39,285,999) of those who visited a theme park or exhibit reported that this activity was the main reason for taking at least one trip in the past two years.

Theme Park and Exhibit Visitors are typically 18 to 44 years of age. Most are married and they are more likely than the average U.S. Pleasure Traveler to have dependent children (under 18) living at home. Their level of education (60.8% university or higher) and household incomes (\$78,940) are slightly above-average. They are slightly over-represented in Alaska and the South Atlantic, Middle Atlantic and East South Central regions of the United States and slightly less likely to live in rural areas or smaller towns.

Theme Park and Exhibit Visitors were slightly more likely to have taken a trip to Canada than the average U.S. Pleasure Traveler (16.7% versus 14.6%), however, this segment is not a prime target group for Canadian tourism activities. The most common Canadian destinations were Ontario, British Columbia and Quebec.

Theme Park and Exhibit Visitors are family-oriented in terms of their trip activities and vacation preferences. When on trips, Theme Park and Exhibit Visitors were more likely than the average U.S. Pleasure Traveler to have visited exhibits (e.g., science & technology exhibits, garden theme attractions) and to have participated in family-friendly outdoor activities (e.g., games & individual sports, team sports, cycling, horseback riding). They tend to value relaxing vacations (e.g., get a break from their day-to-day environment, relax & relieve stress) and prefer vacations that enrich family relationships and offer lots of things to see and do for both adults and children.

Most Theme Park and Exhibit Visitors frequently use the Internet to plan trips (77.7%) and to book at least part of a trip online (56.6%). They are more likely than the average U.S. Pleasure Traveler to obtain information and purchase tickets from the websites of attractions and exhibits. Their media preferences reflect their family-orientation and especially in terms of magazines read (e.g., family & parenting magazines). The majority visit travel-related websites and read the travel section of weekend newspapers. They are also more likely than the average U.S. Pleasure Traveler to obtain travel information from television shows and television advertising.

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 visited theme parks and exhibits 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.



Visiting Theme Parks and Exhibits While on Trips

Market Incidence

Over the last two years, 37.8% (83,501,751) of adult Americans visited theme parks and exhibits while on an out-of-town, overnight trip of one or more nights. The most popular activity was visiting an amusement park (26.0%). Visiting a zoo (15.7%) or an aquarium (15.7%) were the next most popular, followed by a water theme park (9.6%), a movie theme park (5.4%) and a wax museum (3.2%).

Almost one half of those who visited a theme park or exhibit in the past two years (47.0%, or 39,285,999 adult Americans) reported that this activity was the main reason for taking at least one trip in the past two years. Visiting an amusement park, movie theme park or water theme park were more likely to be mentioned as being the main reason for taking a trip than were visiting a zoo, an aquarium or a wax museum.

Fig. 1 Incidence of Visiting Theme Parks & Exhibits While on Trips¹

	Number of Theme Park and Exhibit Visitors ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total U.S. Population ⁵
Size of Market	83,501,751	39,285,999	170,510,241	222,846,268
Theme Parks & Exhibits (All Activities)	83,501,751	47.0%	49.0%	37.8%
Amusement park	57,441,303	53.9%	33.7%	26.0%
Zoo	34,747,288	27.0%	20.4%	15.7%
Aquarium	34,906,165	25.7%	20.5%	15.7%
Water theme park	21,382,383	38.5%	12.5%	9.6%
Movie theme park	11,959,899	40.1%	7.0%	5.4%
Wax museum	7,048,220	19.9%	4.1%	3.2%
Participated in all six activities	990,897	23.5%	0.6%	0.5%

- 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 - "Theme Park and Exhibit Visitors" are defined as individuals who visited theme parks or exhibits 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

Relative to the average U.S. Pleasure Traveler, those who visited theme parks and exhibits while traveling are slightly over-represented among those living in Alaska and the South Atlantic, Middle Atlantic and East South Central regions of the United States. They are slightly less likely to be from rural areas and small towns with populations less than 100,000.

Fig. 2 Geographic Distribution & Population Size of Those Who Visited Theme Parks & Exhibits While on Trips

	Total Population	Estimated Number of Theme Park and Exhibit Visitors	Percent of Pleasure Travelers in Region Who Visited a Theme Park or Exhibit on a Trip	Percent of Total Regional Population Who Visited a Theme Park or Exhibit on a Trip
United States	222,846,268	83,501,751	49.0%	37.8%
New England	11,095,629	4,154,808	48.5%	37.6%
Middle Atlantic	31,005,526	11,839,771	51.4%	38.5%
East North Central	34,621,254	12,809,095	48.1%	37.3%
West North Central	15,024,360	5,416,975	45.0%	36.3%
South Atlantic	42,602,998	17,076,798	53.2%	40.4%
East South Central	13,597,436	4,836,245	50.6%	35.8%
West South Central	24,853,901	8,163,856	45.0%	33.4%
Mountain	15,030,720	5,588,442	46.1%	37.5%
Pacific	34,529,689	13,396,242	48.0%	39.0%
Alaska	484,754	219,518	52.0%	45.6%
Not Available	745,757	319,976	51.6%	43.1%
Less than 100,000	29,429,442	9,760,693	47.0%	33.5%
100,000 to 499,999	36,551,501	13,667,478	50.3%	37.7%
500,000 to 1,999,999	52,335,815	19,867,355	49.9%	38.2%
2,000,000 or more	103,783,753	39,886,248	48.6%	38.7%

Theme Park and Exhibit Visitors are most likely to live in North or South Carolina, Georgia, New Jersey, Virginia and Kentucky. They are least likely to live in Montana, Idaho, Wyoming, District of Columbia, Missouri and Minnesota (see Fig. 3 on next page).

Fig. 3 Those Who Visited Theme Parks & Exhibits While on Trips by U.S. State

Region	State	Population of State	Estimated Number Theme Park and Exhibit Visitors	Percent of Pleasure Travelers in State	Percent of State Population
United States	All States	222,846,268	83,501,751	49.0%	37.8%
New England	Connecticut	2,685,692	972,388	47.1%	36.2%
	Maine	1,047,770	309,720	42.8%	30.2%
	Massachusetts	4,423,562	1,781,289	50.8%	40.4%
	New Hampshire	1,604,344	573,923	48.1%	35.8%
	Rhode Island	837,445	342,768	49.3%	40.9%
	Vermont	496,816	174,721	45.7%	35.2%
Middle Atlantic	New Jersey	6,708,501	2,820,511	54.2%	42.6%
	New York	14,727,054	5,605,297	50.9%	38.3%
	Pennsylvania	9,569,972	3,413,963	49.9%	35.9%
East North Central	Illinois	9,521,097	3,570,675	48.1%	38.0%
	Indiana	4,717,624	1,786,516	49.9%	38.2%
	Michigan	7,709,890	3,006,357	50.1%	39.3%
	Ohio	8,412,962	2,868,825	46.4%	34.4%
	Wisconsin	4,259,682	1,576,722	45.8%	37.1%
West North Central	Iowa	2,262,393	860,310	48.1%	38.4%
	Kansas	2,304,474	859,462	48.5%	38.0%
	Minnesota	3,946,220	1,427,247	42.3%	36.3%
	Missouri	4,138,758	1,342,366	41.9%	32.7%
	Nebraska	1,304,361	527,940	50.5%	40.5%
	North Dakota	488,140	185,219	45.1%	38.2%
	South Dakota	580,015	214,431	47.7%	37.0%
South Atlantic	Delaware	646,427	225,005	46.0%	36.1%
	District of Columbia	521,285	144,314	41.5%	27.7%
	Florida	13,937,467	5,573,951	51.9%	40.5%
	Georgia	6,668,302	2,781,612	54.6%	41.9%
	Maryland	3,428,206	1,338,802	50.2%	39.2%
	North Carolina	6,651,453	2,837,998	57.6%	42.9%
	South Carolina	3,241,944	1,278,538	54.0%	39.9%
	Virginia	5,957,159	2,459,025	53.5%	41.5%
	West Virginia	1,550,755	437,553	50.3%	28.2%
East South Central	Alabama	3,431,591	1,218,551	50.4%	35.6%
	Kentucky	3,447,277	1,280,513	52.6%	37.3%
	Mississippi	2,156,793	640,801	46.4%	30.6%
	Tennessee	4,561,775	1,696,380	51.1%	37.2%
West South Central	Arkansas	2,103,346	699,986	49.2%	33.8%
	Louisiana	3,367,908	1,088,526	48.3%	32.9%
	Oklahoma	2,643,565	836,525	44.4%	31.6%
	Texas	16,739,082	5,538,819	44.1%	33.7%
Mountain	Arizona	4,451,660	1,789,389	50.8%	40.7%
	Colorado	3,501,822	1,255,374	43.4%	36.0%
	Idaho	1,044,920	290,114	35.3%	27.8%
	Montana	726,027	188,599	31.4%	26.5%
	Nevada	1,809,582	719,026	49.6%	39.7%
	New Mexico	1,433,596	526,649	47.9%	37.3%
	Utah	1,671,322	693,546	49.5%	42.0%
	Wyoming	391,790	125,745	37.7%	32.1%
Pacific	Alaska	484,754	219,518	52.0%	45.6%
	California	26,965,837	10,687,707	48.7%	39.9%
	Oregon	2,793,303	985,841	45.7%	35.4%
	Washington	4,770,549	1,722,693	45.0%	36.4%

Demographic Profile

Theme Park and Exhibit Visitors are younger than the average U.S. Pleasure Traveler and over-represented among those 18 to 44 years of age. The majority are married and they are more likely than the average U.S. Pleasure Traveler to have dependent children (less than 18 years of age) living at home. Their level of education (60.8% university or higher) and household incomes (\$78,940) are slightly above-average.

Fig. 4 Demographic Profile of Those Who Visited Theme Parks & Exhibits on a Trip Relative to All U.S. Pleasure Travelers

Attribute	Size of Market	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park or Exhibit ¹	Pleasure Travelers	Index ²
		83,501,751	87,008,490	170,510,241	100
Gender	Male	47.6%	49.4%	48.5%	98
	Female	52.4%	50.6%	51.5%	102
Age of Respondent	18 to 24	12.0%	9.7%	10.8%	111
	25 to 34	25.3%	16.8%	21.0%	121
	35 to 44	20.9%	13.8%	17.3%	121
	45 to 54	20.6%	21.5%	21.0%	98
	55 to 64	12.5%	18.3%	15.5%	81
	65 Plus	8.7%	19.9%	14.4%	60
Average Age		42.1	48.7	45.4	N/A
Marital Status	Not married	27.6%	33.4%	30.5%	90
	Married	72.4%	66.6%	69.5%	104
Parental Status	No children under 18	61.0%	78.6%	70.0%	87
	Children under 18	39.0%	21.4%	30.0%	130
Education	High school or less	18.2%	22.7%	20.5%	89
	Trade, Technical, Community Col.	21.0%	21.8%	21.4%	98
	University Degree	43.0%	39.1%	41.1%	105
	Post Graduate Degree	17.8%	16.4%	17.1%	104
Household Income	Under \$20,000	6.2%	9.9%	8.1%	76
	\$20,000 to \$39,999	14.3%	18.1%	16.2%	88
	\$40,000 to \$59,999	16.6%	16.7%	16.7%	100
	\$60,000 to \$79,999	15.6%	13.8%	14.7%	106
	\$80,000 to \$99,999	12.9%	10.3%	11.6%	111
	\$100,000 to \$149,999	15.9%	12.9%	14.4%	111
	\$150,000 or more	7.4%	6.0%	6.7%	111
	Not stated	11.1%	12.2%	11.7%	95
Average Household Income		\$78,940	\$69,798	\$74,303	N/A

- 1 - "Did not Visit a Theme Park or Exhibit" 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 visit a theme park or exhibit on any trip. The number of Theme Park and Exhibit Visitors and Non-Visitors equals the total number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Theme Park and Exhibit Visitors in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Theme Park and Exhibit Visitors 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)

The overall travel frequency of Theme Park and Exhibit Visitors is comparable to that of the average U.S. Pleasure Traveler. However, they were slightly more likely than average to have visited Mexico, the Caribbean and overseas destinations.

Theme Park and Exhibit Visitors were also slightly more likely than average to have taken a trip to Canada in the past two years (16.7% versus 14.6%), although this segment is not considered a prime target for Canadian tourism promotional activity. The most common destinations in Canada were Ontario (9.8%), British Columbia (4.8%) and Quebec (3.7%). In relative terms, this segment was slightly more likely to have visited each of the Canadian provinces and territories.

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

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park or Exhibit	Pleasure Travelers	Index
Size of Market	83,501,751	87,008,490	170,510,241	100
All destinations	89.5%	81.5%	85.4%	105
Canada	16.7%	12.5%	14.6%	115
Newfoundland and Labrador	0.5%	0.3%	0.4%	119
Prince Edward Island	0.7%	0.5%	0.6%	122
New Brunswick	0.9%	0.7%	0.8%	109
Nova Scotia	1.4%	1.2%	1.3%	108
Quebec	3.7%	2.5%	3.1%	119
Ontario	9.8%	6.8%	8.3%	119
Manitoba	0.6%	0.5%	0.5%	114
Saskatchewan	0.5%	0.4%	0.5%	109
Alberta	1.3%	1.1%	1.2%	110
British Columbia	4.8%	3.5%	4.1%	116
Yukon	0.7%	0.5%	0.6%	118
Northwest Territories	0.5%	0.3%	0.4%	118
Nunavut	0.1%	LT 0.1%	LT 0.1%	155
Own State	84.8%	74.8%	79.7%	106
Other parts of the U.S.	93.9%	87.4%	90.6%	104
Mexico	15.9%	11.4%	13.6%	117
Caribbean	15.2%	10.4%	12.7%	119
All other destinations	10.9%	8.2%	9.5%	114

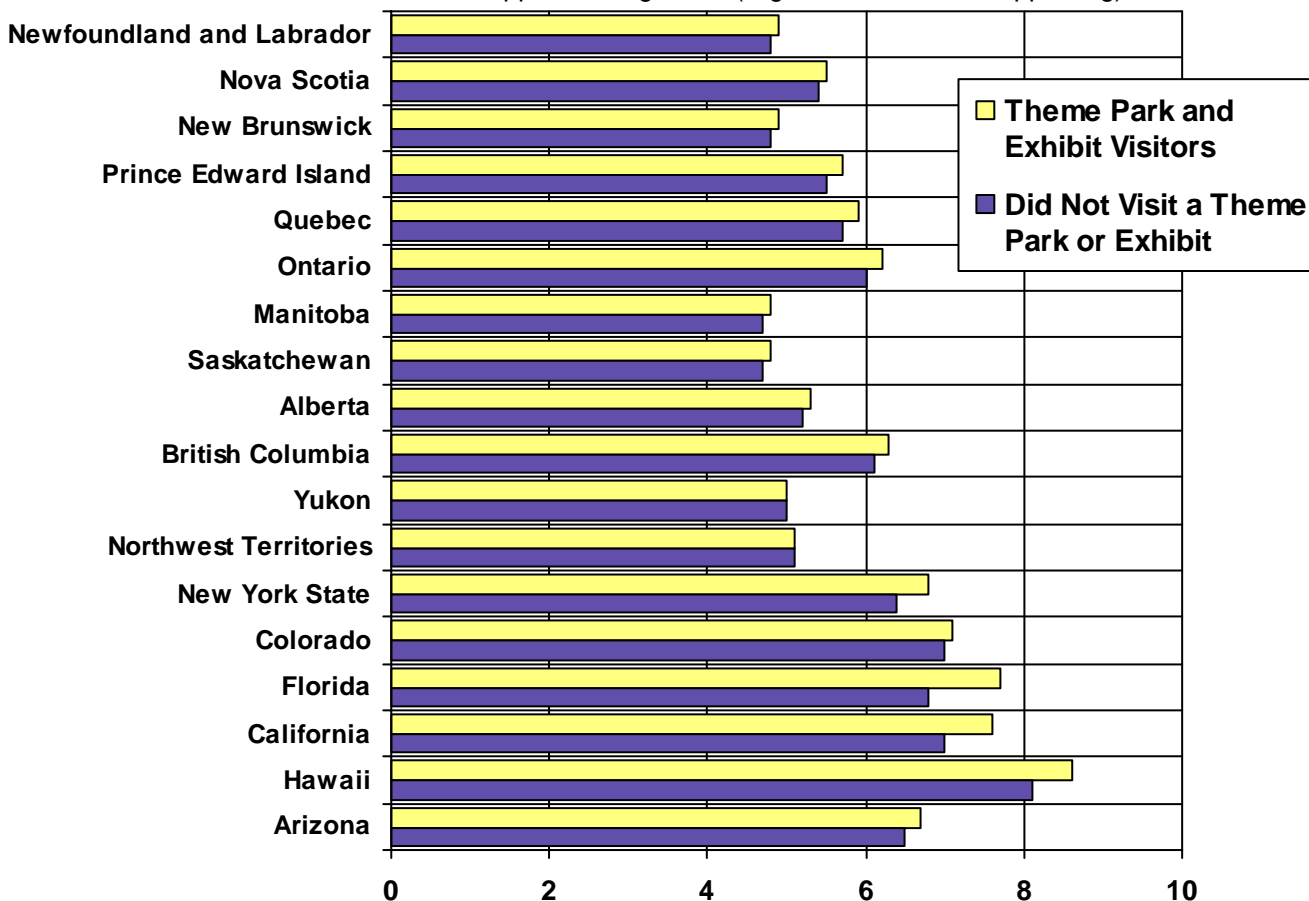
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

The appeal of Canadian destinations among Theme Park and Exhibit Visitors is comparable to that of the average U.S. Pleasure Traveler. British Columbia (6.3) and Ontario (6.2) received the highest ratings.

As with other U.S. Pleasure Travelers, Theme Park and Exhibit Visitors rated the U.S. reference states as more appealing than the Canadian destinations. Theme Park and Exhibit Visitors rated Hawaii (8.6) as the most appealing destination, however, they also gave above-average ratings to Florida (7.7) and California (7.6), which are states well-known for their large, theme-based amusement parks (e.g., Disney, Universal).

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 Culture and Entertainment Activities Pursued While on Trips

Relative to the average U.S. Pleasure Traveler, Theme Park and Exhibit Visitors were active in a wide range of culture and entertainment activities while on trips. The majority of Theme Park and Exhibit Visitors went shopping and dining, visited historical sites, museums and art galleries, attended fairs and festivals, and went to casinos, theatre and comedy clubs. However, relative to the average U.S. Pleasure Traveler, this segment was especially more likely to visit science and technology exhibits and garden theme attractions, to attend national and international sporting events, and to take part in agro-tourism activities.

Fig. 7 Cultural and Entertainment Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Culture & Entertainment Activity)

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park or Exhibit	Pleasure Travelers	Index
Size of Market	83,501,751	87,008,490	170,510,241	100
Shopping & Dining	85.2%	70.5%	77.7%	110
Historical Sites, Museums & Art Galleries	63.2%	44.1%	53.5%	118
Fairs & Festivals	54.9%	27.6%	41.0%	134
Casino, Theatre & Comedy Clubs	53.7%	37.5%	45.4%	118
Fine Dining & Spas	40.4%	25.8%	33.0%	123
Science & Technology Exhibits	38.5%	11.7%	24.8%	155
Wine, Beer & Food Tastings	28.8%	17.2%	22.9%	126
Professional Sporting Events	23.0%	9.5%	16.1%	143
Garden Theme Attractions	22.0%	5.7%	13.7%	161
Rock Concerts & Recreational Dancing	20.7%	10.0%	15.3%	136
Equestrian & Western Events	20.5%	10.6%	15.5%	133
Agro-Tourism	20.5%	6.8%	13.5%	152
High Art Performances	15.2%	6.9%	10.9%	138
Theatre, Film & Musical Festivals	11.8%	4.9%	8.3%	142
Aboriginal Cultural Experiences	11.8%	5.5%	8.6%	137
Amateur Tournaments	10.3%	5.1%	7.7%	135
Archaeological Digs & Sites	7.1%	4.0%	5.5%	129
Participatory Historical Activities	5.5%	2.4%	3.9%	141
National & International Sporting Events	2.9%	0.8%	1.9%	157

Culture and Entertainment Activities Pursued While Not on Trips

Theme Park and Exhibit Visitors were somewhat more likely than the average U.S. Pleasure Traveler to participate in most culture and entertainment activities when NOT traveling. They were especially more likely to go to zoos or aquariums and amusement or theme parks when not traveling. Relative to the average U.S. Pleasure Traveler, Theme Park and Exhibit Visitors were also more likely to stay overnight at a B&B in their own city (perhaps as a brief getaway from family life) and to have visited a day spa.

Fig. 8 Cultural and Entertainment Activities Pursued While Not on Trips

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park or Exhibit	Pleasure Travelers	Index
Size of Market	83,501,751	87,008,490	170,510,241	100
Going out to eat in restaurants	94.8%	90.9%	92.8%	102
Going to festivals or fairs	71.5%	59.7%	65.5%	109
Going to zoos or aquariums	59.0%	32.8%	45.6%	129
Going to amusement or theme parks	52.9%	23.9%	38.1%	139
Going to amateur sporting events	45.4%	34.5%	39.9%	114
Going to historic sites or heritage buildings	43.3%	37.1%	40.1%	108
Going to museums	42.4%	32.8%	37.5%	113
Going to professional sporting events	39.9%	30.1%	34.9%	114
Going to pick-your-own farms or farmers' market	34.3%	29.0%	31.6%	109
Going to live theatre	31.5%	26.9%	29.2%	108
Going to art galleries or art shows	30.8%	24.9%	27.8%	111
Going to gamble in casinos	28.9%	27.1%	28.0%	103
Going to bars with live pop or rock bands	26.6%	20.6%	23.6%	113
Going to rock music concerts	25.3%	17.4%	21.3%	119
Going dancing	23.4%	18.4%	20.8%	112
Going to botanical gardens	22.9%	17.1%	20.0%	115
Going to classical music concerts	15.8%	14.1%	14.9%	106
Staying overnight in a hotel or B&B in own city	13.4%	7.8%	10.6%	127
Going to day spas	12.6%	8.1%	10.3%	123
Going to rodeos	9.4%	7.0%	8.2%	115
Going to jazz clubs	9.0%	6.9%	7.9%	113
Going to the ballet	8.3%	5.9%	7.0%	117
Going to the opera	6.3%	5.3%	5.7%	109

Outdoor Activities Pursued While on Trips

When on trips, Theme Park and Exhibit Visitors were generally more active in outdoor activities than the average U.S. Pleasure Traveler. Most Theme Park and Exhibit Visitors included ocean activities (e.g., swimming, sunbathing) when on trips. They were also more likely than the average U.S. Pleasure Traveler to play games, individual sports and team sports, to have gone cycling and horseback riding and to have participated in a 'board & blade' activity (e.g., skateboarding, rollerblading) or an extreme air sport (e.g., bungee jumping) when on trips. Many of these activities tend to be more common with family travel.

Fig. 9 Outdoor Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Outdoor Activity)

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park or Exhibit	Pleasure Travelers	Index
Size of Market	83,501,751	87,008,490	170,510,241	100
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	51.4%	28.2%	39.6%	130
Wildlife Viewing	45.0%	25.2%	34.9%	129
Games & Individual Sports (e.g., tennis, board games)	32.7%	12.2%	22.2%	147
Hiking, Climbing & Paddling	30.0%	17.2%	23.5%	128
Boating & Swimming (e.g., motorboating, swimming in lakes)	28.1%	14.3%	21.0%	133
Fishing	22.2%	15.5%	18.8%	118
Exercising & Jogging	19.0%	9.4%	14.1%	135
Golfing	13.0%	8.4%	10.7%	122
Team Sports (e.g., football, baseball, basketball)	11.2%	4.7%	7.9%	142
Downhill Skiing & Snowboarding	10.4%	5.8%	8.0%	129
Cycling	8.9%	3.8%	6.3%	141
Horseback Riding	8.9%	3.5%	6.2%	145
Snowmobiling & ATVing	8.9%	5.4%	7.1%	125
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	6.6%	3.0%	4.8%	139
Board & Blade (e.g., skateboarding, ice-skating)	6.5%	1.7%	4.0%	162
Hunting	5.8%	5.0%	5.4%	108
Scuba & Snorkelling	5.6%	2.6%	4.1%	137
Motorcycling	3.6%	2.6%	3.1%	116
Extreme Air Sports (e.g., parachuting, bungee jumping)	2.6%	0.8%	1.7%	153
Cross-country Skiing & Snowshoeing	2.4%	1.4%	1.9%	128
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	0.4%	0.2%	0.3%	131

Outdoor Activities Pursued While Not on Trips

Theme Park and Exhibit Visitors are more active in outdoor activities than the average U.S. Pleasure Traveler when not traveling. The majority of Theme Park and Exhibit Visitors went on day outings to a park and picnicking, went swimming, exercised at home or at a fitness club and gardened at home when not traveling. They were also more likely than the average U.S. Pleasure Traveler to participate in 'board-and-blade' activities (e.g., rollerblading, ice-skating, skateboarding) when not traveling.

Fig. 10 Outdoor Activities Pursued While NOT on Trips

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park or Exhibit	Pleasure Travelers	Index
Size of Market	83,501,751	87,008,490	170,510,241	100
Day outing to a park	70.9%	55.6%	63.1%	112
Swimming	66.2%	47.2%	56.5%	117
Exercising at home or at a fitness club	59.9%	52.3%	56.0%	107
Gardening	54.4%	51.9%	53.1%	102
Picnicking	53.5%	42.2%	47.7%	112
Hiking	36.4%	28.7%	32.5%	112
Fishing	35.6%	30.0%	32.8%	109
Camping	30.2%	23.3%	26.7%	113
Cycling	27.1%	18.8%	22.9%	118
Jogging	23.1%	16.1%	19.5%	118
Sailing or other boating	22.3%	17.7%	20.0%	112
Golfing	20.3%	16.3%	18.3%	111
Playing team sports	19.8%	12.0%	15.8%	125
Playing racquet sports (e.g., tennis or badminton)	16.9%	9.7%	13.2%	128
Riding an all-terrain vehicle (ATV)	13.1%	10.0%	11.5%	114
Hunting	12.1%	11.4%	11.8%	103
Horseback riding	10.7%	6.6%	8.6%	124
Rollerblading	10.1%	4.7%	7.3%	137
Canoeing or kayaking	9.3%	6.4%	7.8%	119
Ice-skating	7.4%	3.7%	5.5%	135
Downhill skiing	7.1%	4.4%	5.7%	124
Snowmobiling	3.9%	2.7%	3.3%	118
Snowboarding	3.3%	2.1%	2.7%	124
Skateboarding	3.1%	1.4%	2.2%	140
Cross-country skiing	2.9%	2.1%	2.5%	116

Accommodations Stayed In While on Trips

Similar to U.S. Pleasure Travelers overall, Theme Park and Exhibit Visitors were most likely to have stayed at a seaside resort or in a public campground when on trips in the past two years. They were slightly more likely than the average U.S. Pleasure Traveler to have stayed at a health spa, a country inn or resort with a gourmet restaurant and a cooking or wine tasting school.

Fig. 11 Accommodations Stayed In While on Trips

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park or Exhibit	Pleasure Travelers	Index
Size of Market	83,501,751	87,008,490	170,510,241	100
Seaside Resort	41.1%	32.9%	37.7%	109
A Public Campground in a National, State, Provincial or Municipal Park	37.6%	30.9%	34.8%	108
Lakeside / Riverside Resort	28.8%	21.2%	25.6%	112
A Private Campground	22.7%	18.5%	20.9%	108
Ski Resort or Mountain Resort	20.3%	15.8%	18.4%	110
A Camp Site in a Wilderness Setting (Not a Campground)	10.2%	8.9%	9.6%	105
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	8.9%	8.5%	8.7%	102
Health Spa	8.1%	4.2%	6.5%	125
Wilderness Lodge You Can Drive to by Car	8.0%	6.1%	7.2%	111
Country Inn or Resort with Gourmet Restaurant	4.9%	2.9%	4.1%	121
Farm or Guest Ranch	4.3%	3.8%	4.1%	105
On a Houseboat	3.6%	2.0%	2.9%	122
Remote or Fly-In Wilderness Lodge	1.9%	1.4%	1.7%	113
Cooking School	1.5%	0.8%	1.2%	126
Wine Tasting School	1.1%	0.5%	0.9%	127
Remote or Fly-In Wilderness Outpost	1.1%	0.7%	0.9%	116

Tours and Cruises Taken During Past Two Years

Theme Park and Exhibit Visitors were generally more likely than the average U.S. Pleasure Traveler to have taken tours and cruises in the past two years. They were most likely to have taken sameday tours (both organized and self-guided), city tours and scenic drives through the countryside while on trips. A Caribbean ocean cruise and a sightseeing cruise were also popular among those who visited theme parks and exhibits.

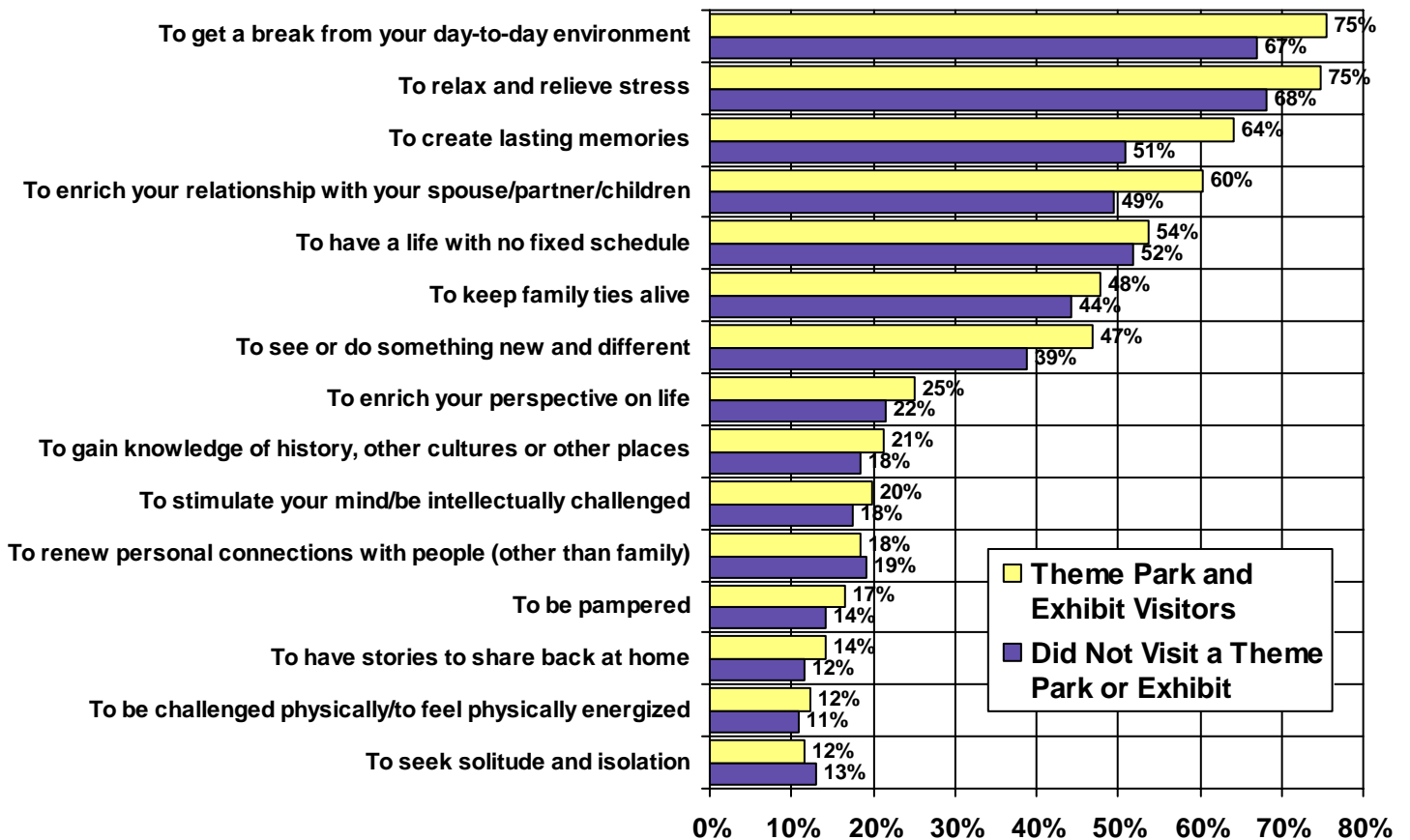
Fig. 12 Tours and Cruises Taken During Past Two Years

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park or Exhibit	Pleasure Travelers	Index
Size of Market	83,501,751	87,008,490	170,510,241	100
A self-guided sameday tour while on an overnight trip	23.5%	15.0%	19.2%	123
An organized sameday guided tour while on an overnight trip	21.7%	15.5%	18.5%	117
Around the city	19.3%	12.4%	15.8%	122
Around the country side - scenic drives	15.8%	10.5%	13.1%	121
A self-guided overnight tour where you stayed in different locations	13.2%	7.6%	10.4%	127
Caribbean ocean cruise	10.9%	7.2%	9.0%	121
Some other type of tour	10.7%	7.0%	8.8%	121
On the water (sightseeing cruise)	10.3%	5.4%	7.8%	132
Wilderness tour	9.6%	5.3%	7.4%	130
An organized overnight guided tour where you stayed in different locations	9.1%	6.7%	7.9%	116
An organized overnight guided tour where you stayed in a single location	8.1%	5.4%	6.7%	121
To a casino	6.5%	3.3%	4.9%	133
Ocean cruise - Other	5.4%	4.2%	4.8%	113
To a winery	4.7%	2.5%	3.6%	131
Alaskan ocean cruise	2.6%	2.4%	2.5%	103
Cruise on another lake or river	2.5%	1.5%	2.0%	126
To a factory	2.5%	1.2%	1.8%	135
Some other type of cruise	2.0%	1.4%	1.7%	118
In the air as a pilot or passenger of an airplane or helicopter	1.9%	1.0%	1.4%	131
Great Lakes cruise	0.6%	0.2%	0.4%	158
Cruise on the St. Lawrence River	0.4%	0.2%	0.3%	136
Submarine cruise	0.4%	0.1%	0.2%	151

Benefits Sought While on Vacation

As with most U.S. Pleasure Travelers, the majority of Theme Park and Exhibit Visitors take a vacation 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. However, relative to other U.S. Pleasure Travelers, this segment is especially like to value relaxation while on vacation (i.e., getting a break from their day-to-day environment, relaxing and relieving stress). They also consider it important that a vacation is family-oriented, novel and memorable.

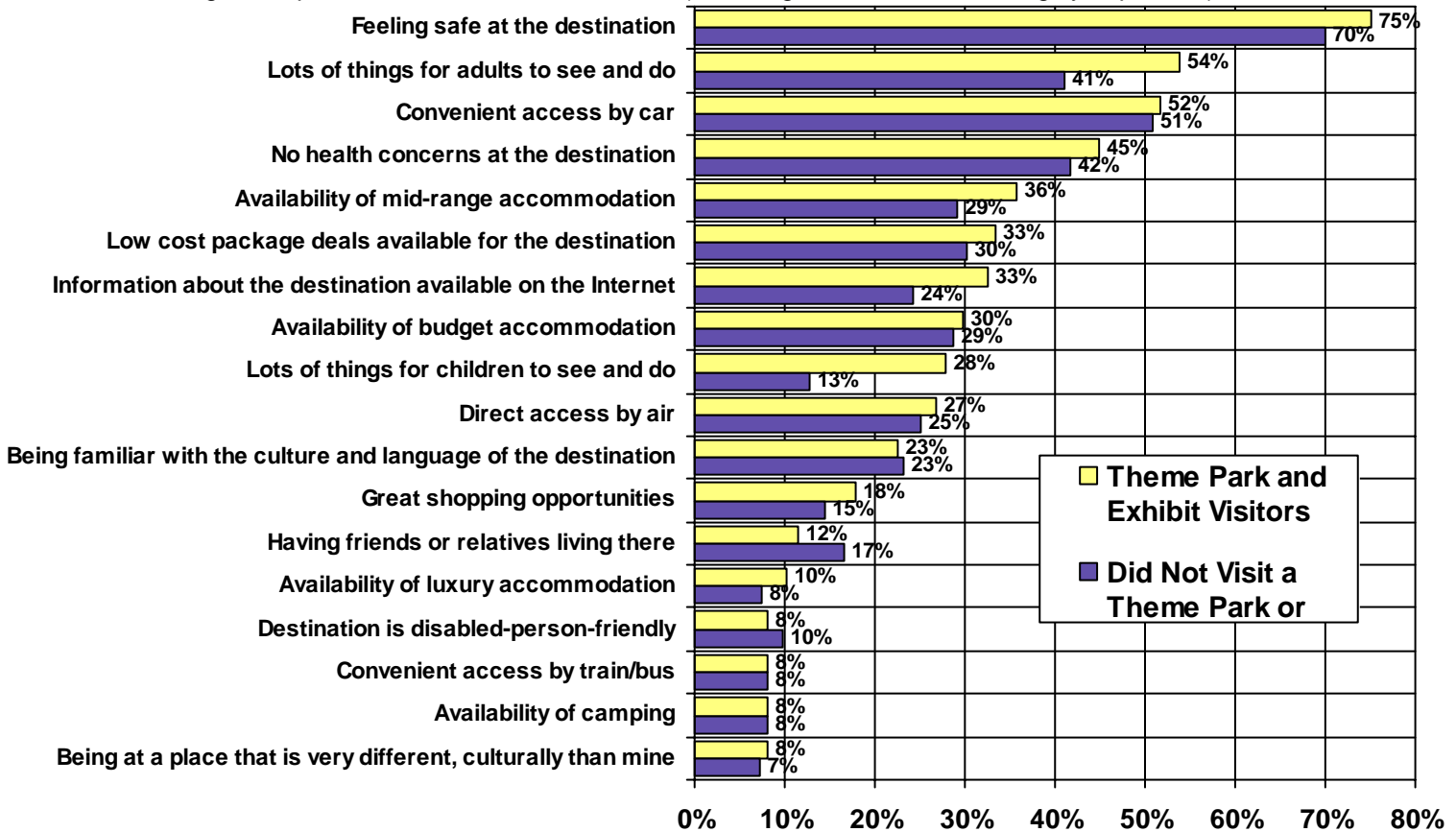
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

As with most U.S. Pleasure Travelers, it is very important to Theme Park and Exhibit Visitors that they feel safe at a destination and have lots of things to see and do. They also look for destinations that are conveniently accessible by car. However, Theme Park and Exhibit Visitors are more likely than other U.S. Pleasure Travelers to consider it important that a destination offers lots of things for children to see and do, has mid-range priced accommodation and provides information on the Internet.

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



How Destinations Are Selected

Respondents were asked a series of questions concerning how they select destinations. Similar to U.S. Pleasure Travellers overall, the majority of Theme Park and Exhibit Visitors have a desired destination in mind, rather than specific activities or a type of experience, when they start planning a winter or summer trip. For summer travel, they are slightly 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)

	Theme Park and Exhibit Visitors	Did Not Visit a Theme Park or Exhibit	Pleasure Travelers	Index
Size of Market	83,501,751	87,008,490	170,510,241	100
Summer				
Started with a desired destination in mind	58.0%	58.4%	58.2%	100
Started by considering specific activities wanted to do	11.3%	8.4%	9.9%	114
Started with a certain type of vacation experience in mind	17.8%	16.7%	17.3%	103
Looked for packaged deals - no destination in mind	1.3%	0.9%	1.1%	118
Considered something else first	4.0%	5.2%	4.6%	88
Don't Know / Other	7.5%	10.4%	8.9%	84
Winter				
Started with a desired destination in mind	58.7%	59.2%	58.9%	100
Started by considering specific activities wanted to do	13.0%	9.4%	11.3%	115
Started with a certain type of vacation experience in mind	15.3%	14.1%	14.8%	104
Looked for packaged deals - no destination in mind	1.5%	1.4%	1.4%	104
Considered something else first	4.7%	6.0%	5.3%	88
Don't Know / Other	6.8%	9.9%	8.3%	82

Trip Planning and Information Sources Consulted

The majority of Theme Park and Exhibit Visitors were solely (39.3%) or partly responsible (18.8%) for planning their vacation trips. Most in this segment used Internet websites, past experience and word-of-mouth to plan their vacations. However, relative to the average U.S. Pleasure Traveler, Theme Park and Exhibit Visitors are particularly more likely to get travel information from television programs and television advertising.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Theme Park and Exhibit Visitors	Did Not Visit a Theme Park or Exhibit	Pleasure Travelers	Index
Size of Market		83,501,751	87,008,490	170,510,241	100
Who Plans Trips?	Respondent plans trips	39.3%	39.1%	39.2%	100
	Trip planning a shared responsibility	18.8%	16.5%	17.6%	107
	Someone else plans trips	41.9%	44.5%	43.2%	97
Information Sources Consulted	An Internet website	83.1%	68.6%	76.0%	109
	Past experience / Been there before	59.0%	49.9%	54.5%	108
	Advice of others / Word-of-mouth	51.0%	39.6%	45.4%	112
	Maps	35.4%	29.8%	32.7%	109
	An auto club such as AAA	28.0%	19.9%	24.0%	117
	Visitor information centres	25.7%	14.9%	20.4%	126
	Official travel guides or brochures from state / province	25.3%	15.7%	20.6%	123
	Articles in newspapers / magazines	22.5%	13.7%	18.1%	124
	A travel agent	20.9%	16.3%	18.6%	112
	Travel information received in the mail	19.3%	12.1%	15.8%	123
	Travel guide books such as Fodor's	14.9%	9.1%	12.0%	124
	Advertisements in newspapers / magazines	13.9%	7.8%	10.9%	127
	Programs on television	9.8%	4.4%	7.1%	138
	An electronic newsletter or magazine received by e-mail	7.8%	4.1%	6.0%	130
	Advertisements on television	5.9%	2.0%	4.0%	149
Visits to trade, travel or sports shows	2.9%	2.0%	2.4%	118	

Use of the Internet to Plan and Arrange Trips

Theme Park and Exhibit Visitors are more likely than the average U.S. Pleasure Traveler to use the Internet to plan and arrange trips (77.7%). The majority in this segment (56.6%) used the Internet to book at least part of a trip.

Most Theme Park and Exhibit Visitors use travel planning / booking websites (e.g., Expedia) and hotel or resort websites. Accommodation and air tickets are the trip components most often booked over the Internet.

Theme Park and Exhibit Visitors are more likely than the average U.S. Pleasure Traveler to consult the website of a specific attraction. They are also more likely than average to purchase tickets for specific activities or attractions over the Internet.

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

		Theme Park and Exhibit Visitors	Did Not Visit a Theme Park or Exhibit	Pleasure Travelers	Index
	Size of Market	83,501,751	87,008,490	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	22.3%	39.3%	31.0%	72
	Uses Internet to plan trips only	21.1%	19.2%	20.1%	105
	Uses Internet to book part of trip	56.6%	41.5%	48.9%	116
Types of Websites Consulted	A travel planning / booking website	59.5%	50.8%	55.6%	107
	A website of a hotel or resort	57.3%	48.4%	53.3%	107
	An airline's website	47.1%	43.6%	45.6%	103
	A website of an attraction	44.3%	19.8%	33.4%	133
	A tourism website of a country / region / city	38.2%	31.3%	35.1%	109
	Some other website	25.2%	24.8%	25.1%	101
	A cruise line website	13.6%	10.9%	12.4%	110
	A motorcoach website	1.5%	1.2%	1.3%	111
Parts of Trips Booked Over The Internet	Accommodations	76.0%	66.4%	71.9%	106
	Air tickets	70.8%	70.3%	70.6%	100
	Car rental	41.1%	33.8%	38.0%	108
	Tickets or fees for specific activities or attractions	34.2%	16.1%	26.3%	130
	A package containing two or more items	20.6%	14.1%	17.8%	116
	Tickets for rail, bus or boat / ship fares	13.0%	10.4%	11.9%	109
	Other	2.9%	2.9%	2.9%	100

Media Consumption Habits

The majority of Theme Park and Exhibit Visitors visit travel-related websites and read the travel section of a weekend newspaper. They are also more likely than the average U.S. Pleasure Traveler to read travel magazines and watch travel shows on television. This segment's media preferences are clearly family-oriented in terms of the magazines read (e.g., family and parenting), televisions programs watched (e.g., reality shows), radio programs listened to (e.g., top 40 / current hits), and websites visited (e.g., magazine sites, entertainment).

Fig. 18 Media Consumption Habits

		Theme Park and Exhibit Visitors	Did Not Visit a Theme Park or Exhibit	Pleasure Travelers	Index
Size of Market		83,501,751	87,008,490	170,510,241	100
Newspaper Readership	Reads daily newspaper	59.0%	60.8%	59.9%	99
	Reads weekend edition of newspaper	56.5%	54.6%	55.5%	102
	Reads local neighbourhood or community newspapers	50.7%	48.4%	49.5%	102
	Reads other types of newspapers	14.4%	13.3%	13.9%	104
	Frequently or occasionally reads travel section of daily newspaper	45.0%	41.0%	43.0%	105
	Frequently or occasionally reads travel section of weekend newspaper	52.1%	46.6%	49.3%	106
Types of Magazines Read (Top 5 Indexed)	Family and parenting	16.7%	8.0%	12.3%	136
	Photography and video	4.9%	2.9%	3.9%	126
	Travel (e.g., Condé Nast)	13.0%	8.4%	10.6%	122
	Fashion and beauty	16.8%	11.3%	14.0%	120
	Professional sports	14.8%	10.6%	12.6%	117
Type of Television Programs Watched (Top 5 Indexed)	Reality shows (e.g., American Idol)	45.2%	34.1%	39.5%	114
	Travel shows	32.5%	25.6%	28.9%	112
	Music / Music video shows / channels	31.0%	25.2%	28.1%	111
	Science fiction/ Fantasy shows	26.2%	21.8%	24.0%	109
	Situation comedies (e.g., Friends)	55.9%	47.2%	51.5%	109
Type of Radio Programs Listened To (Top 5 Indexed)	Top 40 / Current hits	31.7%	20.7%	26.1%	121
	Modern rock/Alternative rock	38.2%	27.8%	32.9%	116
	Multicultural	5.5%	4.0%	4.7%	116
	All sports	13.7%	10.2%	11.9%	115
	Soft music / Adult contemporary	26.9%	22.4%	24.6%	109
Types of Websites Visited (Top 5 Indexed)	Travel	53.6%	41.8%	48.0%	112
	Magazine sites	16.4%	13.1%	14.8%	111
	Entertainment	59.2%	47.8%	53.7%	110
	House and home	31.1%	26.1%	28.7%	108
	Network news sites (e.g., CNN)	41.2%	35.9%	38.7%	106

Appendix One		
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 One		
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

Appendix Two: 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	