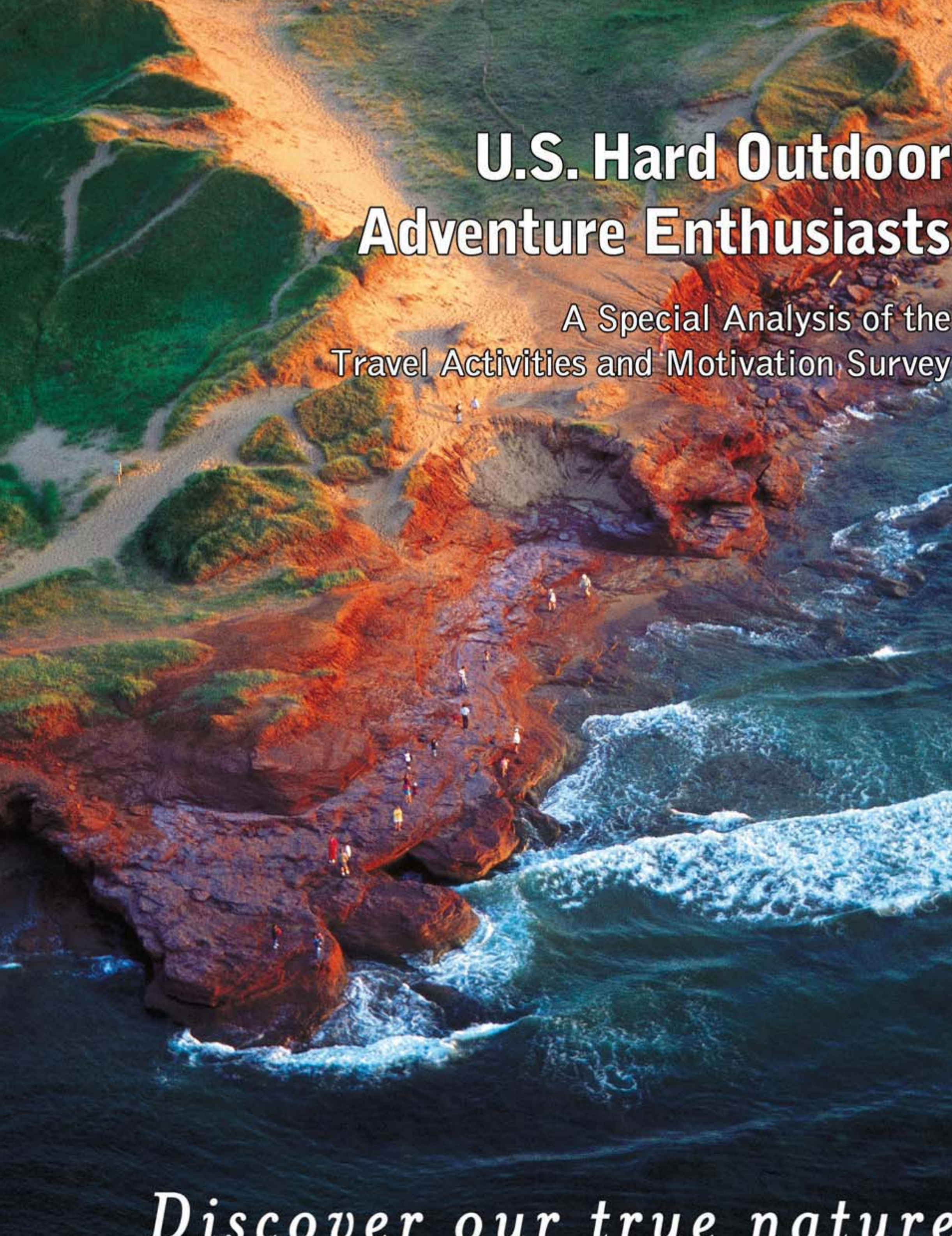
U.S. Hard Outdoor Adventure Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey



TAMS

Discover our true nature

Canadian Tourism Commission

Commission canadienne du tourisme

Canada

U.S. Hard Outdoor Adventure Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey (TAMS)

Prepared for:

The Canadian Tourism Commission (CTC)

Prepared by:

Research Resolutions
& Consulting Ltd.

Third inset photo:
courtesy of Travel Manitoba

National Library of Canada cataloguing in publication data

Main entry under title:

U.S. hard outdoor adventure enthusiasts

Issued also in French under title: Touristes américains adeptes de
l'aventure de plein air dure.
"A special analysis of the Travel Activities and Motivation
Survey (TAMS)".
ISBN 0-662-33876-6
Cat. no. C86-160/2003E

1. Adventure and adventurers–Canada.
2. Americans–Travel–Canada.
3. Ecotourism–Canada.
4. Tourism–Canada.
I. Canadian Tourism Commission.
II. Research Resolutions & Consulting Ltd.

G155.C3U82 2003 338.4'7917104648 C2003-902133-5

If you require additional copies, please visit our website at www.canadatourism.com or e-mail your order to the CTC Distribution Centre at: distribution@ctc-cct.ca. Please quote #C50181E when ordering by e-mail.

Table of Contents

1. Introduction

Canada offers a wide range of tourism experiences to potential travellers from the United States. In order to obtain a better understanding of the potential size, characteristics and interests of American activity-based market segments, the Canadian Tourism Commission (CTC) commissioned Research Resolutions & Consulting Ltd. to undertake special analyses and reports based on the Travel Activities and Motivation Survey (TAMS). This report focuses on **Hard Outdoor Adventure Enthusiasts –** Americans who have taken leisure trips to Canada and exhibit a particular interest in hard outdoor adventure. As such, they have taken leisure trips to Canada and, in many cases, to other destinations in the past couple of years, have taken at least one trip *to experience adventure and excitement* and have included at least one of the following activities on these trips.

- ice climbing
- rock climbing
- mountain biking
- dog sledding
- white water rafting
- hang gliding
- bungee jumping
- heli-skiing
- scuba diving

These tourists provide a rich source of information for tourism businesses and marketers who want to increase or retain the Hard Outdoor Adventure Enthusiast market to Canada in the future.

In addition to a *current* profile of Hard Outdoor Adventure Enthusiasts, the TAMS survey has been modified to permit an assessment of the impacts of an aging population on market potential for this group. Using population projections for the U.S.A. obtained from the U.S. Census Bureau, TAMS data were “aged” twenty-five years into the future. Comparisons of the market size, composition, and travel behaviour of Americans in 2000 with estimates of the market profile in 2025 provide tourism planners and marketers with critical information about the products and services that may be required in the future to attract tourists from Canada’s largest foreign market. Chapter 4 of this report is devoted to the impacts of population changes on Hard Outdoor Adventure Enthusiasts in the U.S.A.

Additional reports, featuring profiles of other outdoor and cultural segments in the United States and Canada are available from the CTC. Topics include Heritage, Visual Arts, and Performing Arts Enthusiasts, Wine and Culinary Enthusiasts, Soft Outdoor Adventure Enthusiasts, Winter Outdoor Activity Participants and Alpine Ski Tourists.

2. Executive Summary

2.1 Hard Outdoor Adventure Enthusiasts: Market Size

Of the 200.4 million American adults in 2000, about 15.7 million are Hard Outdoor Adventure Enthusiasts (8%). Of these, about one-fifth claim to have visited Canada on a leisure trip in the past two years. Thus, the market for Canada's hard outdoor adventure products is in the range of 3.2 million American adults.

Many Hard Outdoor Adventurers live in Tier I states – those immediately adjacent to the Canadian border. Only about one-fifth of all American adults live in these border states (18%) but those who come to Canada and are Hard Outdoor Adventurers represent almost one-third of the total market (31%). Canada is, however, comparatively unsuccessful in attracting Americans living considerable distances from the U.S./Canada border. Tier III states represent more than half of the U.S. adult population (54%) but just over one-third of the members of this outdoor group (36%).

American Hard Outdoor Adventure Enthusiasts travel to Canada's regions in much the same way as do Americans with any recent Canadian experience. As such, they are most apt to have visited Ontario in the past couple of years (56%), followed by British Columbia (32%) and Quebec (28%). Smaller proportions visit Atlantic Canada (7%) and the Prairie provinces – Alberta (13%) and Manitoba/Saskatchewan (8%). About 1-in-20 also claim to have visited one of Canada's Territories over the past couple of years.

The comparatively strong *lure* of Western Canada and the Territories among Hard Outdoor Adventure Enthusiasts may be a function of the fact that members of this market segment are particularly likely to live in the Pacific states that traditionally feed provinces such as British Columbia and Alberta. The *Super Natural* image and mountain/sea coast oriented tourism products offered in Western Canada may also be factors in generating travel to this region among American Hard Outdoor Adventurers.

There is a robust competitive environment for Canada within the Hard Outdoor Adventure Enthusiast segment. These tourists display an almost universal tendency to take leisure trips *within* the United States (97%) and are also apt to travel to Mexico or the Caribbean (32%), Europe (26%) and, less commonly, to other countries (21%).

2.2 Hard Outdoor Adventure Enthusiasts: Demographic Characteristics

Hard Outdoor Adventure Enthusiasts are more likely to be men (62%) than women (38%). They are heavily concentrated at the younger end of the adult age spectrum with close to two-fifths falling into the 18 to 34 year age group (39%). A further 3-in-10 are between 35 and 44 years, but few are 55 years of age or older (12%).

Most live in adult-only households – those with no members under the age of eighteen (67%), although one-third are likely to be in the market for outdoor tourism experiences that take into account the interests and needs of teenagers or children (33%).

Hard Outdoor Adventure Enthusiasts are also more affluent than is the "typical" American leisure traveller to Canada with an average household income of $72,600 (US$) compared to $65,200 (US$) for the typical visitor (1998 US dollars). Higher household incomes are consistent with higher levels of formal education: almost two-fifths of Hard Outdoor Adventure Enthusiasts have at least one university degree (39%) and a further one-half (48%) have had some other form of post-secondary education.

2.3 Outdoor Activities among Hard Outdoor Adventure Enthusiasts

By definition, Hard Outdoor Adventure Enthusiasts have taken an overnight trip in the past couple of years in order to *experience adventure and excitement* and have participated in at least one high-energy outdoor activity while on trips. They may have engaged in these activities while on a recent trip in Canada or on trips to other destinations, worldwide. Of the activities used to define Hard Outdoor Adventure Enthusiasts, mountain biking has the largest following, attracting almost half of these outdoor enthusiasts (46%). Scuba diving has been a leisure trip activity for 2-in-5 of these American tourists (40%), and about 1-in-4 have gone rock climbing (28%) and/or white water rafting on recent trips (26%).

Outdoor Activities Engaged in on Trips in the Past 2 Years (Used to Define the Market Segment)

- Mountain biking (46%)
- Scuba diving (40%)
- Rock climbing (28%)
- White water rafting (26%)
- Dog sledding (5%)
- Ice climbing (4%)
- Hang gliding (3%)
- Heli skiing (3%)
- Bungee jumping (2%)

Adventurous or *niche* winter sports including ice climbing, dog sledding and heli-skiing are appreciably less popular among Hard Outdoor Adventure Enthusiasts than are warmer weather outdoor pursuits.

Even though they are not used to define the this market segment, two-thirds of Hard Outdoor Adventure Enthusiasts view wildlife (66%) and over half hike or backpack in wilderness settings when on trips (56%). Other outdoor activities characteristic of at least two-fifths of these adventurers include recreational cycling (49%), downhill skiing (42%), fishing in fresh water (41%), and viewing wildflowers and flora (41%). Slightly fewer go kayaking or canoeing (38%) or golfing (37%) when on their travels.

American outdoor enthusiasts are not necessarily "eco tourists" – one-fifth of them are hunters and as noted above, twice this proportion are fresh water anglers. The prominence of hunting and fishing among these adventurers, along with their strong interest in both summer and winter outdoor activities suggests *four season* opportunities within this market.

Heritage experiences that might prove most attractive to these outdoor adventurers include general history museums, local festivals and fairs as well as science and technology museums, and farmers' fairs or markets. These heritage experiences have attracted over two-fifths of the hard outdoor adventure market while on a trip in the past couple of years.

2.4 Overlap With Other Activity-Based Segments

One-half of Hard Outdoor Adventure Enthusiasts with recent Canadian leisure travel experiences are also Heritage Tourism Enthusiasts (50%), about two-fifths are Visual Arts Enthusiasts (44%) and just under one-third are Wine/Culinary Enthusiasts (30%) and/or Performing Arts Enthusiasts (30%).

These overlaps suggest packaging, product development and marketing opportunities: sub-groups within the Hard Outdoor Adventure Enthusiasts segment might be attracted by *combinations* of products that meet their rugged outdoor adventure interests as well as their interests in museums, galleries, Aboriginal events, theatre, other live performances, and food and wine experiences.

2.5 Image Challenges & Media Sources

Canada is most highly rated by Hard Outdoor Adventure Enthusiasts for attributes that support an *outdoors* image:

- A place with beautiful scenery
- A great place to go for fishing
- A great place to relax and get away from it all
- A place that is very clean and well cared for
- A place that respects the natural environment.

This market segment also considers Canada to be a place with lots of things for *mature adults to see and do,* is *safe* for visitors, is one of the best destinations for *outdoor activities*, has *friendly people,* offers many activities for *families,* and is a great place to experience *adventure and excitement.* Of those who provide a rating, Canada is also rated favourably for being a great place for *hunting* but over one-third of the Americans in this outdoors market are unable to rate the country on this dimension.

Less favourable ratings are accorded attributes associated with *shopping opportunities*, *value for money,* and *cultural and urban attractions*. American Hard Outdoor Adventure Enthusiasts are also somewhat subdued in their ratings of Canada as a place with many activities for *young people.* They are least positive about Canada as a place to visit in the *winter*, as a place to experience the *"good life"* and as a destination with a *popular or trendy* image.

In light of their tourism interests, it might be expected that outdoor adventure enthusiasts would have a more favourable attitude toward Canada as a destination for *outdoor activities* and as a place to experience *adventure and excitement* than do Americans who travel to Canada as a whole . . . but this is not the case. Their ratings of Canada on these dimensions are the same as those offered by American visitors to Canada as a whole. More effort may be required to bolster Canada's image on these types of attributes if hard outdoor activity enthusiasts are going to be attracted to Canadian destinations to pursue their outdoor interests.

Image building and product awareness messages to Hard Outdoor Adventure Enthusiasts are likely to achieve the highest reach in daily and weekend editions of local newspapers, including the travel sections of these editions and through the American Automobile Association (AAA). These media outlets have the greatest potential for reaching these outdoor adventurers among those measured in the survey.

Over one-quarter of these enthusiasts say that they attend boat shows and slightly fewer claim to go to sportsmen's shows or RV/camper shows regularly. These consumer trade show venues may prove to be important marketing channels to get information about Canada's outdoor adventure products to this market segment.

2.6 Impacts of Population Changes

Three fundamental changes in the U.S.A. population structure might be taken into account in tourism planning and product development in Canada over the next two decades:

- As the primary market for inbound tourism from the United States, border and mid-tier state populations will grow at an appreciably *lower* rate than will the population of the U.S.A. as a whole, and particularly the southern tier of the U.S.A. At an estimated 18 per cent increase in the adult population of states that are on the Canada/ U.S.A. border by 2025 compared to a 27 per cent increase for the entire country, the pool of Americans from which Canada has to draw from for the all-important "border" market will increase at a lower rate than will more distant parts of the U.S.A. By 2025, the border state population is estimated to reach 42.3 million adults from its current level of 35.9 million.
- Older people – those who are at least 55 years of age – will represent an increasingly sizeable proportion of the American population. They currently account for over one-quarter of the adult population (27%) but will represent over one-third by 2025 (37%).
- As the population ages, the proportion of American adults living in households with children will decline. At this time, 1-in-3 adults live in households with teenagers or children (34%), but this proportion will decline to less than 3-in-10 by 2025 (29%).

2.7 Implications for Hard Outdoor Adventure Enthusiasts

There will be an increase in the absolute number of Americans who will be in the market for rugged outdoor adventure activities between 2000 and 2025, from an estimated 15.7 million in 2000 to 17.5 million by 2025. Canada's likely share of this market – those who will seek hard outdoor experiences and take leisure trips to Canada – is also expected to grow, from 3.2 million to 3.8 million.

These growth rates are *lower* than the population growth rate of the U.S.A. as a whole, primarily because outdoor enthusiasts tend be younger people and those living in northern tier states. Just as the younger end of the age spectrum will diminish as a proportion of the total U.S.A. population over the next two decades, so too will the market for outdoor adventure experiences – unless changes are made in the amenities and services offered by tourism businesses who serve this market segment to better accommodate the needs and interests of an aging population.

If the new generation of Americans displays similar tourism activity preferences to their 2000 counterparts, the impact of an aging population will result in a shift away from strenuous outdoor activities and a corresponding shift toward non-strenuous *warm weather* outdoor activities and indoor cultural events and attractions.

2.8 Summary

Hard Outdoors Adventure Enthusiast market for Canada from the U.S.A. is characterized by its relative youth, affluence and appeal to men.

Outdoor activities with the greatest appeal to these tourists are those that are pursued during the *warm weather months* -- mountain biking, hiking/backpacking, wildlife viewing, fishing, canoeing or kayaking, rock climbing and scuba diving. Two-fifths of these outdoor adventurers are, however, on the alpine slopes in the *winter*.

Of the market segments of special interest to the CTC, American Hard Outdoors Adventure Enthusiasts currently represent one of the smallest pools of potential visitors for Canada's outdoor-oriented tourism businesses – 15.7 million adult Americans. Of these Americans, 1-in-5 have taken recent leisure trips in Canada (3.2 million), leaving considerable opportunity for growth.

Attraction of the Hard Outdoor Adventure Enthusiast segment will become increasingly difficult as the American population becomes older and because members of this market segment are especially likely to seek tourism experiences in other countries.

There are also some image concerns that may have to be addressed to attract Hard Outdoor Adventurers to *Canada's* adventure experiences. These include reinforcement of Canada as a destination that offers *adventure and excitement* and the availability of activities for *young people*.

As traditional markets decline because of changes in the population structure, Canada may have to develop a multi-pronged strategy to retain and/or grow the Hard Outdoor Adventure Enthusiast segment. For example, the industry may have to provide outdoor products with varying levels of physical exertion so that nature-based tourism businesses can continue to attract the energetic, action-oriented youth market but can also attract the increasing number of older Americans who may retain their interest in the outdoors but will require gentler outdoor experiences. In other words, the *hard* outdoor market may transform itself into the *soft* outdoor market as it ages.

3. U.S. Hard Outdoor Adventure Enthusiasts – 2000

3.1 Market Size & Overlap With Other Activity Groups

The CTC identified several market segments generated from variables within the Travel Activities and Motivation Survey (TAMS) for special analysis. These include Hard and Soft Outdoor Adventure Enthusiasts, Wine/Culinary Enthusiasts, Alpine Skiers, Other Winter Outdoor Activity Participants (non-alpine), Heritage Enthusiasts, Visual Arts Enthusiasts, and Performing Arts Enthusiasts (see Appendix for definitions). The table below provides information on the total size of each of these market segments, the number who have travelled to a Canadian destination in the past couple of years and the degree of overlap within the Hard Outdoor Adventure Enthusiast segment.

Of the 200.4 million American adults in 2000, about 15.7 million are Hard Outdoor Adventure Enthusiasts (8%). Of these, about one-fifth claim to have visited Canada on a leisure trip in the past two years. Thus, the market for Canada's hard outdoor adventure products is in the range of 3.2 million American adults.

Table 1: U.S.A. Hard Outdoor Activity Enthusiasts – Market Size & Comparisons With Other Segments

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Hard Outdoor Adventure
Adults 18+	*200.4 million*	*26.3 million*	*3.2 million*
Hard Outdoor Adventure	**15.7**	**3.2**	**3.2**
Soft Outdoor Adventure	35.5	7.1	N/A
Winter Outdoors	15.0	3.7	1.1
Wine/Culinary	21.6	5.5	1.0
Heritage	34.5	8.3	1.6
Performing Arts	15.6	3.8	0.9
Visual Arts	27.6	7.0	1.4
Alpine Skiing	21.4	4.6	1.4

Source: Special TAMS Tabulations, page 7-1. See Appendix for unweighted base sizes.

Of the activity-based market segments of special interest to the CTC, Hard Outdoor Adventure Enthusiasts are among the smallest. At 15.7 million, this segment is appreciably smaller than Soft Outdoor Adventure Enthusiasts (35.5 million), Heritage Tourism Enthusiasts (34.5 million), Visual Arts Enthusiasts (27.6 million), and Wine/Culinary Enthusiasts (21.6 million).

Within the sub-group of Americans who have recent travel experience in Canada, the 3.2 million Hard Outdoor Adventure Enthusiasts are also smaller than the markets cited above but are close to parity with Performing Arts Enthusiasts (3.8 million) and Winter Outdoor tourists (3.7 million).

One-half of Hard Outdoor Adventure Enthusiasts with recent Canadian leisure travel experiences are also Heritage Tourism Enthusiasts (50%), about two-fifths are Visual Arts Enthusiasts (44%) and just under one-third are Wine/Culinary Enthusiasts (30%) and/or Performing Arts Enthusiasts (30%). These overlaps suggest packaging, product development and marketing opportunities: sub-groups within the Hard Outdoor Adventure Enthusiasts segment might be attracted by *combinations* of products that meet their rugged outdoor adventure interests as well as their interests in museums, galleries, Aboriginal events, theatre, other live performances, and food and wine experiences.

Many of these outdoor enthusiasts will also be found skiing on slopes – two-fifths of the outdoor activity participants also claim to alpine ski and/or snowboard while on recent trips (1.4 million).

3.2 Where They Live & Where They Travel

Since Canada attracts the majority of its U.S.A. market from border states, it is not too surprising that many Hard Outdoor Adventure Enthusiasts live in Tier I states – those immediately adjacent to the Canadian border. Only about one-fifth of all American adults live in these border states (18%) but those who come to Canada and are Hard Outdoor Adventurers represent almost one-third of the total market (31%). While the rugged outdoor market draws particularly heavily on *near* markets, it is at close to parity for mid-tier states.

Table 2: Geographic Distribution of U.S.A. Hard Outdoor Activity Enthusiasts

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Hard Outdoor Adventure
Adults 18+	*200.4 million*	*26.3 million*	*3.2 million*
Tier I (Border States)	18%	33%	31%
Tier II	28%	32%	33%
Tier III	54%	35%	36%

Source: Special TAMS Tabulations, pages 1-5; 23-5. Percentages may not add to 100 per cent due to rounding.

Canada is, however, comparatively unsuccessful in attracting Americans living considerable distances from the U.S./Canada border. Tier III states represent more than half of the U.S. adult population (54%) but just over one-third of the members of this outdoor group (36%).

Two U.S. regions have noticeably higher proportions of Hard Outdoor Adventurers with Canadian experience than would be expected in light of the U.S. population distribution as a whole. These are East North Central and Pacific. U.S. Census regions that are particularly *under*-represented within this outdoor market segment include West North Central, East South Central, South Atlantic and West South Central. For more regional information, please refer to Summary Table A-2, appended.

American Hard Outdoor Adventure Enthusiasts travel to Canada's regions in much the same way as do Americans with any recent Canadian experience. As such, they are most apt to have visited Ontario in the past couple of years (56%), followed by British Columbia (32%) and Quebec (28%). Smaller proportions visit Atlantic Canada (7%) and the Prairie provinces – Alberta (13%) and Manitoba/Saskatchewan (8%). About 1-in-20 also claim to have visited one of Canada's Territories over the past couple of years.

The comparatively strong *lure* of Western Canada and the Territories among Hard Outdoor Adventure Enthusiasts may be a function of the fact that members of this market segment are particularly likely to live in the Pacific states that traditionally feed provinces such as British Columbia and Alberta. The *Super Natural* image and mountain/sea coast oriented tourism products offered in Western Canada may also be factors in generating travel to this region among American Hard Outdoor Adventurers.

There is a robust competitive environment for Canada within the Hard Outdoor Adventure Enthusiasts segment. These tourists display an almost universal tendency to take leisure trips *within* the United States (97%) and are also apt to travel to Mexico or the Caribbean (32%), Europe (26%) and, less commonly, to other countries (21%).

Table 3: U.S.A. Hard Outdoor Activity Enthusiasts – Destinations Visited in Past 2 Years

	USA ADULTS	RECENT LEISURE TRAVELLERS TO CANADA	
	TOTAL	TOTAL	HARD OUTDOOR ADVENTURE
Adults 18+	*200.4 million*	*26.3 million*	*3.2 million*
Canadian destinations	**13%**	**100%**	**100%**
Atlantic Canada	2%	12%	7%
Quebec	3%	25%	28%
Ontario	7%	55%	56%
Manitoba/Saskatchewan	1%	7%	8%
Alberta	1%	10%	13%
British Columbia	4%	30%	32%
Territories	1%	4%	5%
Other destinations			
Any U.S.A. Destination	69%	93%	97%
Mexico/Caribbean	15%	25%	32%
U.K./Other Europe	8%	18%	26%
Other Countries	7%	15%	21%
Any Non- U.S.A. (NET)	31%	100%	100%

Source: Special TAMS Tabulations, pages 2; 24. Percentages do not add to 100 per cent because of multiple destinations.

3.3 Demographic Characteristics of Hard Outdoor Adventure Enthusiasts

Hard Outdoor Adventure Enthusiasts are more likely to be men (62%) than women (38%). They are heavily concentrated at the younger end of the adult age spectrum with close to two-fifths falling into the 18 to 34 year age group (39%). A further 3-in-10 are between 35 and 44 years, but few are 55 years of age or older (12%).

Table 4: Demographics of U.S.A. Hard Outdoor Activity Enthusiasts – Gender & Age

	Recent Leisure Travellers to Canada	
	Total	Hard Outdoor Adventure
Adults 18+	*26.3 million*	*3.2 million*
Men	51%	62%
Women	49%	38%
18 - 34 years	24%	39%
35 - 44 years	20%	29%
45 - 54 years	20%	18%
55 - 64 years	14%	9%
65+ years	17%	3%
Average Age	47.3 years	39.0 years

Source: Special TAMS Tabulations, pages 3-1; 25-1.

Compared to the total market for all leisure tourism experiences over the past couple of years, Hard Outdoor Adventure Enthusiasts are substantively under-represented among older Americans, and especially among those over 55 years of age. Only 1-in-8 Hard Outdoor Adventure Enthusiasts are at least 55 years of age (12%) compared to 1-in-3 recent leisure travellers as a whole (31%). Over-representation at the younger end of the age spectrum and under-representation at the older end brings the average age of Hard Outdoor Adventure Enthusiasts to about 39 years -- well below the 47 year average for American leisure tourists as a whole.

Hard Outdoor Adventure Enthusiasts span the income and education spectrums, with one-quarter falling into a relatively low income group (under $40,000 US), possibly because of the over-representation of younger people in this market segment. A slightly lower proportion claim to have household incomes in the $40,000 to $60,000 US range (21%); and the same proportion (25%) say their income is between $60,000 to $100,000 US. Incomes in excess of $100,000 US are characteristic of almost 1-in-3 of these outdoor enthusiasts (30%).

Table 5: Demographics of U.S.A. Hard Outdoor Activity Enthusiasts – Income & Education

	Recent Leisure Travellers to Canada	
	Total	Hard Outdoor Adventure
Adults 18+	*26.3 million*	*3.2 million*
Household Income		
Under $40,000	26%	24%
$40,000 - $59,999	24%	21%
$60,000 - $99,999	31%	25%
$100,000 or more	19%	30%
Average	$65,200 US	$72,600 US
Education		
Some Secondary or Less	6%	3%
Completed Secondary	19%	11%
Some Post Secondary	45%	48%
Graduated University	30%	39%

Source: Special TAMS Tabulations, pages 4, 5-2; 26, 27-2. Income is percentaged among those stating; reported in 1998 US dollars.

This income pattern suggests that Hard Outdoor Adventurers are appreciably more affluent than is the "typical" American traveller to Canada, with fewer of these enthusiasts in the lowest income group and considerably more in the highest group than is evident for American travellers to Canada as a whole. These differences are reflected in a higher average household income for the hard outdoor adventure market – $72,600 US – than is the case for the typical American leisure visitor to Canada at $65,200 US.

Higher household incomes are consistent with higher levels of formal education: almost two-fifths of Hard Outdoor Adventure Enthusiasts have at least one university degree (39%) and a further one-half (48%) have had some other form of post-secondary education.

Most Hard Outdoor Adventure Enthusiasts live in adult-only households – those with no members under the age of eighteen (67%), although one-third are likely to be in the market for outdoor tourism experiences that take into account the interests and needs of teenagers or children (33%).

Table 6: Demographics of U.S.A. Hard Outdoor Activity Enthusiasts – Household Composition

	Recent Leisure Travellers to Canada	
	Total	Hard Outdoor Adventure
Adults 18+	*26.3 million*	*3.2 million*
Adult Only	71%	67%
Any Teens/Children	29%	33%
Any Children under 12	22%	24%

Source: Special TAMS Tabulations, pages 6-2; 28-2.

3.4 Travel Activities Among Hard Outdoor Adventure Enthusiasts

3.4.1 Hard Adventure Outdoor Activities

Of the activities used to define Hard Outdoor Adventure Enthusiasts, mountain biking has the largest following, attracting almost half of these outdoor enthusiasts (46%). Scuba diving has been a leisure trip activity for 2-in-5 of these American tourists (40%), and about 1-in-4 have gone rock climbing (28%) and/or white water rafting on recent trips (26%).

Table 7: U.S.A. Hard Outdoor Activity Enthusiasts – Activities Used To Define Market Segment

	Hard Outdoor Adventure
Adults 18+	*3.2 million*
Mountain biking	46%
Scuba diving	40%
Rock climbing	28%
White water rafting	26%
Dog sledding	5%
Ice Climbing	4%
Hang gliding	3%
Heli skiing	3%
Bungee jumping	2%

Source: Special TAMS Tabulations, page 8.

Adventurous or *niche* **winter** sports including ice climbing, dog sledding and heli-skiing are appreciably less popular among Hard Outdoor Adventure Enthusiasts than are warmer weather outdoor pursuits.

3.4.2 Other Outdoor Activities

When on trips, two-thirds of Hard Outdoor Adventure Enthusiasts view wildlife (66%) and over half hike or backpack in wilderness settings (56%). Other outdoor activities characteristic of at least two-fifths of these adventurers include recreational cycling (49%), downhill skiing (42%), fishing in fresh water (41%), and viewing wildflowers and flora (41%). Slightly fewer go kayaking or canoeing (38%) or golfing (37%) on their travels.

Table 8: U.S.A. Hard Outdoor Activity Enthusiasts – Other Outdoor Activities

	Hard Outdoor Adventure
Adults 18+	*3.2 million*
Wildlife viewing	66%
Hiking/backpacking in wilderness settings	56%
Recreational cycling	49%
Downhill skiing	42%
Fishing -fresh water	41%
Wildflowers / flora viewing	41%
Kayaking or canoeing	38%
Golfing	37%
Motor boating	33%
Whale watching	29%
Fishing - salt water	28%
Sailing	23%
Bird watching	22%
Hunting	20%
Cross country skiing	19%
Snowmobiling	16%
Parachuting	9%
Snow boarding	8%
Wind surfing	5%

Source: Special TAMS Tabulations, pages 8-1/3.

American outdoor enthusiasts are not necessarily “eco tourists” – one-fifth of them are hunters and as noted above, twice this proportion are fresh water anglers. The prominence of hunting and fishing among these adventurers, along with their strong interest in both summer and winter outdoor activities suggests *four season* opportunities within this market.

3.4.3 Heritage Activities

As noted earlier, there is considerable overlap between the 3.2 million Hard Outdoor Adventure Enthusiasts and the group of American travellers who are defined as Heritage Enthusiasts. The heritage experiences that might prove most attractive to these outdoor adventurers include general history museums, local festivals and fairs as well as science and technology museums, and farmers' fairs or markets. These heritage experiences have attracted over two-fifths of the hard outdoor adventure market while on a trip in the past couple of years.

Table 9: U.S.A. Hard Outdoor Activity Enthusiasts – Heritage Activities

	HARD OUTDOOR ADVENTURE
Adults 18+	*3.2 million*
General history museums	58%
Local festivals or fairs	50%
Science & tech museums	50%
Farmers' fairs or markets	42%
Historic sites	36%
Pow Wow/other Aboriginal celebrations/attractions	28%
Historical replicas of cities/towns	26%
Pick your own farms / harvesting	22%
Children's museums	21%
French Canadian cultural experiences	20%
Carnivals such as Caribana/ Mardi Gras or Rio's Carnival	19%
Western theme events	18%

Source: Special TAMS Tabulations, page s 9-1/4

Other heritage attractions widely sought by these outdoor adventurers while on their travels include historic sites, replicas of historic towns or cities, and Aboriginal celebrations, attractions and events. Many of Canada's Aboriginal tourism experiences take place in settings that also offer rugged outdoor experiences such as mountain biking, scuba diving and white water rafting. Thus, outdoor heritage activities – along with visits to general history museums or science and technology museums – might be packaged with outdoor *nature* experiences to attract outdoor adventure travellers.

3.4.4 Performing & Visual Arts Activities

With the exception of live theatre performances (47%), there is not a great deal of overlap between Hard Outdoor Adventurers and activities that characterize Performing Arts Enthusiasts when they travel.

Table 10: U.S.A. Hard Outdoor Activity Enthusiasts – Performing & Visual Arts Activities

	Hard Outdoor Adventure
Adults 18+	*3.2 million*
Performing Arts	
Theatre	47%
Jazz music concerts	26%
Classical music concerts	21%
Music festivals	21%
Ballet or other dance	17%
Theatre festivals	16%
Opera	14%
Musical attractions such as Jazzland	13%
Literary festivals	9%
Visual Arts	
Local arts & crafts studios	68%
Art galleries	52%
International film festivals	5%

Source: Special TAMS Tabulations, pages 9-1/5.

Conversely, shopping or browsing in local arts and crafts studios (68%) and, to a lesser extent, going to art galleries (52%) are fairly widely sought by Hard Outdoor Adventurers while on their trips. These activities that characterize the Visual Arts Enthusiast segment might be paired with outdoor experiences to help attract this market segment to Canadian destinations.

3.4.5 Other Attraction-Based Activities

American travellers, regardless of which segment they fall into, seem especially fond of going to zoos on their travels. Thus, it is not surprising that three-fifths of those who have visited Canada in the past couple of years and are Hard Outdoor Adventurers claim to have gone to a zoo while on trips in the recent past. Over half of them have also gone to aquariums, two-fifths have gone to casinos and over one-third have been to botanical gardens while on recent trips.

Table 11: U.S.A. Hard Outdoor Activity Enthusiasts – Other Activities

	HARD OUTDOOR ADVENTURE
Adults 18+	*3.2 million*
Zoos	61%
Aquariums	56%
Casinos	41%
Botanical gardens	37%
Planetariums	25%
Auto races	17%
Horse races	14%

Source: Special TAMS Tabulations, pages 9-3/5.

3.5 Ratings of Canada

Outdoor adventurers were asked to rate Canada on a variety of dimensions using a ten point bi-polar scale ranging from *agree completely* (10) to *disagree completely* (1). Average ratings are shown in the accompanying table and are based on those who volunteered a score for a particular dimension. The table also displays the proportion of Americans in the outdoor market who refrain from offering an opinion.

In this context, Canada is most highly rated by Hard Outdoor Adventure Enthusiasts for attributes that support an *outdoors* image:

- A place with beautiful scenery
- A great place to go for fishing
- A great place to relax and get away from it all
- A place that is very clean and well cared for
- A place that respects the natural environment.

This market segment also considers Canada to be a place with lots of things for *mature adults to see and do*, is *safe* for visitors, is one of the best destinations for *outdoor activities*, has *friendly people*, offers a lot for *families*, and is a great place to experience *adventure and excitement.* Of those who provide a rating, Canada is also rated favourably for being a great place for *hunting* but over one-third of the Americans in this outdoors market are unable to rate the country on this dimension.

Less favourable ratings are accorded attributes associated with *shopping opportunities*, *value for money*, and *cultural and urban attractions*. American Hard Outdoor Adventure Enthusiasts are least positive about Canada as a place to visit in the *winter*, as a place to experience the *"good life"* and as a destination with a *popular or trendy* image.

In light of their tourism interests, it might be expected that outdoor adventure enthusiasts would have a more favourable attitude toward Canada as a destination for *outdoor activities* and as a place to experience *adventure and excitement* than do Americans who travel to Canada as a whole . . . but this is not the case. Their ratings of Canada on these critical dimensions are the same as those preferred by American visitors to Canada as a whole. More effort may be required to bolster Canada's image on these types of attributes if hard outdoor activity enthusiasts are going to be attracted to Canadian destinations.

It is also worth noting that sizeable minorities of Hard Outdoor Adventure Enthusiasts refrain from rating Canada on many dimensions. For example, one-fifth do not have a sufficiently clear impression of Canada's opportunities for *young people* to offer a rating . . . since the market segment is dominated by young adults, this finding is worthy of special attention. Similarly, about one-fifth do not rate Canada for *interesting shops*, as a place *to experience different cultures*, a place for *romance* or to see *historic sites*. Twice this proportion do not know if Canada is a *great place for Aboriginal culture* (38%).

Table 12: U.S.A. Hard Outdoor Activity Enthusiasts – Attitudes Toward Canada

	Recent Leisure Travellers to Canada		
	Total	**Hard Outdoor Adventure**	
Adults 18+	*26.3 million*	*3.2 million*	
	Average #	**Average #**	**Can't Rate %**
Beautiful scenery	9.2	9.3	2%
Great place for fishing	8.7	8.8	24%
Great place to relax	8.6	8.7	5%
Clean/well cared for	8.7	8.7	6%
Respects natural environment	8.5	8.5	9%
Great place for hunting	8.4	8.5	39%
Lots for mature adults	8.6	8.4	15%
Safe for visitors	8.3	8.4	9%
One of best destinations for outdoor activities	8.2	8.3	10%
Lots for families	8.5	8.2	16%
Place with friendly people	8.4	8.1	6%
Great place to experience adventure & excitement	8.0	8.1	11%
Lots for young adults	8.1	7.9	20%
Offers excellent value for money	7.9	7.8	10%
One of best summer destinations	8.1	7.8	10%
Great place to experience city life	7.7	7.7	14%
Place with interesting shops	8.0	7.6	22%
Great place to experience different cultures	7.6	7.5	18%
Many cultural events & attractions	7.8	7.4	18%
Place for romance	7.2	7.3	20%
Great place to see historic sites	7.5	7.0	18%
Great place for Aboriginal culture	7.4	7.0	38%
Great place to experience "good life"	7.1	6.9	23%
One of best winter destinations	6.3	6.5	17%
Popular, trendy place	6.6	6.3	20%

Source: Special TAMS Tabulations, page 13. Average ratings are based on those rating Canada on a ten point bi-polar scale ranging from 10 "agree completely" to 1 "disagree completely".

3.6 Ways to Reach Hard Outdoor Adventure Enthusiasts

There are several measures within TAMS that may help marketers reach Hard Outdoor Adventure Enthusiasts with their messages:

- Print media read on a regular basis;
- Television programs viewed regularly; and
- Club and association memberships.

Americans in this segment are avid local newspaper readers (86%). Furthermore, about half of them claim to read the *travel section* of weekday editions of daily newspapers on a regular basis and almost two-thirds claim to read or look through the *travel section* of the weekend editions of a local newspaper.

Table 13: U.S.A. Hard Outdoor Activity Enthusiasts – Print Media Read Regularly

	HARD OUTDOOR ADVENTURE
Adults 18+	*3.2 million*
Daily Newspaper (Any)	**86%**
Weekday edition	77%
Travel section of weekday edition	55%
Weekend edition	78%
Travel section of weekend edition	64%
Community newspapers	73%
Any Magazines	**96%**
Hobby magazines	46%
News magazines	44%
National Geographic	44%
Travel magazines	44%
Sports magazines	39%
Fashion/homemaking magazines	29%
General interest/city life magazines	23%

Source: Special TAMS Tabulations, page 14.

They are also avid magazine readers (96%), with over 4-in-10 claiming to read hobby magazines, news magazines, National Geographic, and/or travel magazines on a regular basis.

Daily and weekend newspapers may have better reach among Hard Outdoor Adventure Enthusiasts than does any particular type of television programming. About 7-in-10 of these tourists say they watch televised movies on a regular basis and only slightly fewer claim to watch nature shows regularly. Evening sitcoms (58%) and professional sports broadcasts (57%) are also particularly popular within this market segment, followed by early evening news broadcasts and evening dramas (56% each).

Table 14: U.S.A. Hard Outdoor Activity Enthusiasts – Television Programs Viewed Regularly

	HARD OUTDOOR ADVENTURE
Adults 18+	*3.2 million*
Movies	70%
Nature shows	65%
Evening sitcoms	58%
Professional sports	57%
Early evening news	56%
Evening drama	56%
Late evening news	44%
Instructional/hobby shows	39%
Morning news	38%
Daytime programs on weekdays	12%

Source: Special TAMS Tabulations, page 16.

In light of the fact that many Hard Outdoor Adventure Enthusiasts live in border states and would likely drive to Canada, their high level of auto club membership (e.g., AAA) makes this type of organization an opportune way to reach these adventurers.

Their enthusiasm for energetic encounters with the outdoors likely explains why so many Hard Outdoor Adventure Enthusiasts belong to sports clubs (39%). They are much more likely to be sports club members than members of art galleries or museums, nature organizations or botanical gardens.

Over one-quarter of these enthusiasts say that they attend boat shows and slightly fewer claim to go to sportsmen's shows or RV/camper shows regularly. These venues may prove to be important marketing channels to get information about Canada's outdoor adventure products to them.

Table 15: U.S.A. Hard Outdoor Activity Enthusiasts – Club/Organization Memberships & Consumer Trade Show Attendance

	HARD OUTDOOR ADVENTURE
Adults 18+	*3.2 million*
Club/Organization Membership	
Auto club	57%
Sports club	39%
Art gallery/museum	18%
Nature organization	17%
Zoo/botanical garden	13%
Gardening club	6%
Regular Attendance at Travel/Trade Shows	
Boat shows	28%
Sportsmen's shows	23%
RV/Camper shows	20%
Travel shows	17%

Source: Special TAMS Tabulations, pages 17/18.

4. Projections to 2025

4.1 Introduction

In 2000, there were approximately 200.4 million Americans 18 years of age or older. The U.S. Census Bureau projects that this number will increase to 254.3 million by the year 2025, for an increase of 27 per cent. When this population increase is applied to the TAMS data, estimates of market size and characteristics in 2025 can be estimated, assuming that people in various age, gender and regional groups behave in 2025 as they did in 2000.

Because the population will not grow at the same rate among all age groups or in all regions of the United States, Canada should anticipate and prepare for changes in travel activities and interests in its U.S.A. market over the next two decades. In this chapter, some important structural shifts are described for the U.S.A. as a whole. Subsequently, expected change in the hard outdoor adventure market is discussed.

4.2 An Aid to the Reader

The accompanying table and text are provided to aid the reader in interpreting the columns shown in the summary tables included in this section.

Sample Table

U.S.A. Adult Population – Gender & Age

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
	2000	2025		
Adults 18+	*200.4 million*	*254.3 million*		
Men	48%	48%	27%	2%
Women	52%	52%	26%	-2%
18 - 34 years	30%	27%	14%	-50%
35 - 44 years	21%	17%	-1%	-103%
45 - 54 years	17%	16%	17%	-35%
55 - 64 years	11%	13%	47%	76%
65+ years	16%	24%	84%	211%

Source: Special TAMS U.S.A. Tabulations, Table 1.

Percentage of Adult Population In . . . 2000 Proportion of American adults in 2000 who fit the demographic characteristic (e.g., age, gender, place of birth) or participate in a particular activity (e.g., travel to a particular destination; golf, ski , camp or go to a museum while on trips) now. **Example:** 18 – 34 year olds represent 30 per cent of all adults living in the U.S.A., or 60.7 million of the 200.4 million American adults (2000).

Percentage of Adult Population In . . . 2025 Proportion of American adults in 2025 who are projected to fit the demographic characteristic (e.g., age, gender, place of birth) or participate in a particular activity (e.g., travel to a particular destination; golf, ski, camp or go to a museum while on trips). **Example:** 18 – 34 year olds are expected to represent 27 per cent of all adults living in the U.S.A., or 68.9 million of the 254.3 million American adults (2025).

Growth Rate from 2000 to 2025 Anticipated rate of change in the number of American adults who will fit the demographic or behavioural characteristic by 2025. **Example:** the 68.9 million 18 – 34 year olds in 2025 is 14 per cent higher than the 60.7 million 18 – 34 year olds in 2000.

Impact of 2025 Population Structure on Growth Rate How much the structure of the population projected for 2025 will influence the growth rate of a demographic or behavioural characteristic. Negative numbers suggest a downward pressure on growth rates and positive numbers represent an upward pressure. **Example:** the growth rate for 18 – 34 year olds (14%) will be 50 per cent lower than it would have been if the structure of the population had remained as it is was in 2000. Thus, if the population structure of 2000 were sustained to 2025, there would have been 77.0 million young adults in the U.S.A., or 27 per cent more than there were in 2000 but changes in the population structure bring this number down to 68.9 million or 14 per cent more than there were in 2000, for a difference in the growth rate [14%/27%] of –50 per cent.

4.3 Regional Changes in the USA Market

The adult population in different parts of the country will change at different rates, with those that border Canada experiencing the *lowest* growth rate (18%) and those furthest from the border experiencing the highest growth rate (37%).

While states that are immediately adjacent to Canada's border will increase in population over the next two decades, they will do so at a rate of growth that is one-third lower than would have occurred if the population structure of 2000 were to remain intact through 2025. The middle tier states, including some of Canada's major markets such as Pennsylvania, Illinois, Ohio, Massachusetts and the Washington D.C. area will also represent a smaller share of the total USA market than they do now, with a decline in the anticipated growth rate of more than half. In contrast, southern states – those that are more challenging markets for Canada – will increase as a proportion of the total USA adult population, and will grow at a 38 per cent higher rate than would have been anticipated given the current population structure (see Appendix for the states included in each of the three tiers).

Table 16: Shifts in USA Adult Population

	U.S.A. Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Adults 18+ in millions	2000	2025		
Total USA	**200.4**	**254.3**	**27%**	
Tier I (Canada's Border)	35.9	42.3	18%	-34%
Tier II	56.6	64.0	13%	-51%
Tier III	108.0	148.0	37%	38%

Source: Special TAMS U.S.A. Tabulations, Table 5. See Appendix for definition of Tiers.

Mountain and Pacific region states will experience the most dramatic growth over the next two decades. The Mountain region will grow from about 12.1 million adults to 17.4 million by 2025 while the three Pacific states – California, Oregon and Washington – will increase from about 30 million now to over 44 million in two decades. Almost 35 million of these American adults will live in California (see summary table A-3, appended for population estimates for each U.S. Census region).

4.4 Demographic Changes in the USA Market

Changes to the demographic profile of Americans over time are apt to have an especially dramatic impact on Canada's tourism volume and value, and the types of activities our American neighbours will seek on their travels.

4.4.1 Gender & Age

There will be a noticeable decline in the proportion of the population that is young or middle-aged, and a substantive increase in the proportion that is older.

- The 18 to 34 year old age group will decline slightly to just over 1-in-4 adult Americans by 2025;
- Americans in their "family" years (35 – 44) will fall from just over 1-in-5 members of the adult population to about 1-in-6;
- Middle-aged Americans (45 – 54) will hold steady as a proportion of the total population, from 17 per cent to 16 per cent in 2025;
- Starting at about age 55, the pattern shifts with older people representing *higher* proportions of the adult population in the U.S.A. in 2025 than they do now. The increase is most prominent among Americans 65 years of age or older. This cohort currently represents about one-sixth of the adult population but by 2025 it is expected to represent one-quarter.

In absolute numbers, the young adult population (18 – 34 years) will shift from about 60.7 million to 68.9 million between 2000 and 2025. This young cohort is growing at a rate that is 50 per cent lower than would have been expected if the structure of the population had remained constant between 2000 and 2025. Thus, the impact of changes in the population mix in the U.S.A. will reduce the growth rate of the younger age segment substantively. A similar finding is evident for other younger and middle-aged cohorts. In the case of the "family market", not only is the growth rate much lower than would be expected based on today's population structure, but there will be a marginal decrease in the absolute numbers of Americans in the 35 to 44 year age bracket – from 42.4 million in 2000 to 42.0 million in 2025.

As noted above, the trend reverses in the older age groups. In fact, the oldest segment of the population – adults who are at least 65 years of age will represent close to twice as many Americans by 2025 as they do now, or 59.8 million instead of the current 32.5 million.

Table 17: U.S.A. Adult Population – Gender & Age

	% of Adult Population In . . . 2000	2025	Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Adults 18+	*200.4 million*	*254.3 million*		
Men	48%	48%	27%	2%
Women	52%	52%	26%	-2%
18 - 34 years	30%	27%	14%	-50%
35 - 44 years	21%	17%	-1%	-103%
45 - 54 years	17%	16%	17%	-35%
55 - 64 years	11%	13%	47%	76%
65+ years	16%	24%	84%	211%

Source: Special TAMS U.S.A. Tabulations, Table 1.

4.4.2 Household Income & Education

The proportion of American adults with household incomes in various groups from *low* to *high income* are not expected to change substantively between now and 2025. A modest increase in the proportion of Americans who have at least some post-secondary education is anticipated over the next two decades. This change in the educational composition of the U.S.A. market may have an impact on tourism choices in the future.

Table 18: U.S.A. Adult Population – Household Income & Education

	% of Adult Population In . . . 2000	2025	Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Adults 18+	*200.4 million*	*254.3 million*		
Household Income				
Low Income	45%	45%	26%	-4%
Low - Middle	23%	23%	26%	-2%
Middle – High	21%	21%	24%	-9%
High Income	11%	11%	25%	-7%
Education				
Some Secondary or Less	13%	11%	9%	-65%
Completed Secondary	26%	26%	24%	-10%
Some Post Secondary	40%	41%	29%	10%
Graduated University	20%	22%	36%	35%

Source: Special TAMS U.S.A. Tabulations, Table 3. Repercentaged on total stating income. Incomes are expressed in 1998 US dollars.

4.4.3 Household Composition

The 2025 age mix of Americans will have a substantive impact on the types of activities they are interested in pursuing on their travels because as they age, they will become more concentrated in adult-only households. The family market – households in which there are children twelve years of age or younger – will decline from over 1-in-4 (27%) to less than 1-in-4 (23%). Conversely, those who live in adult-only households (no children or teenagers) will increase from 59 per cent to 64 per cent.

Table 19: U.S.A. Adult Population – Household Composition

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
	2000	2025		
Adults 18+	*200.4 million*	*254.3 million*		
Adult Only	59%	64%	37%	40%
Any Teens/Children	34%	29%	9%	-68%
Any Children under 12	27%	23%	8%	-70%

Source: Special TAMS U.S.A. Tabulations, Table 4.

4.5 Destination Choices

With the exception of a slight increase in the proportion of Americans who will likely travel abroad, outbound destination choices in 2025 are likely to look much as they do now, with about 1-in-7 taking leisure trips over a two year period to a Canadian destination and about the same proportion travelling to Mexico or the Caribbean. Travel by Americans to Europe will remain at just under ten percent, but the growth rate for Europe-bound travel (39%) is noticeably higher than would have been expected based on the current population structure.

Table 20: U.S.A. Adult Population – Destinations Visited on Leisure Trips in Past Couple of Years

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
	2000	2025		
Adults 18+	*200.4 million*	*254.3 million*		
Canada	13%	14%	31%	14%
Mexico/Caribbean	15%	15%	28%	5%
U.K./Europe	8%	9%	39%	46%

Source: Special TAMS U.S.A. Tabulations, Tables 24 - 31.

It is important to note that this predicted growth rate for Americans travelling to Europe (39%) is higher than the expected rate of increase in Americans travelling to Canada (31%), suggesting greater competition for Canada within the outbound U.S.A. market in the years to come.

4.6 Hard Outdoor Adventure Enthusiasts

As noted in the demographic profile section of this report, the Hard Outdoor Adventure Enthusiast segment tends to attract comparatively young travellers. Older Americans, and particularly those over 55 years of age are substantively under-represented in this segment.

Because the U.S.A. population will shift over the next two decades to an older one and to one that is less concentrated in the northern tier states, the very characteristics that define Hard Outdoor Adventure Enthusiasts help explain why growth in this market is predicted to be 56 per cent **lower** than would have been expected given today's population structure. The total Hard Outdoor Adventure Enthusiast market in the U.S.A. is predicted to grow from 15.7 million in 2000 to 17.5 million by 2025.

A similar pattern is evident for changes in the Hard Outdoor Adventure Enthusiast segment that takes leisure trips to Canada. This population is expected to increase from 3.2 million now to 3.8 million in 2025. This growth rate, at 20 per cent, is about 25 per cent **lower** than would have been expected given today's population structure.

For purposes of contrast, the table also displays predicted growth rates for other key CTC activity-based market segments. Clearly, segments such as Heritage Enthusiasts, Performing Arts Enthusiasts and Wine/Culinary Enthusiasts – segments that involve little physical exertion -- will grow at much higher rates than those such as hard and soft outdoor adventure enthusiasts. These differences undoubtedly reflect the needs and interests of an aging American population.

Table 21: U.S.A. Adult Population – High Intensity Activity Groups

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Adults 18+ in millions	2000	2025		
Total U.S.A. Adult Population	200.4	254.3	27%	
Hard Outdoor Adventure Enthusiasts	15.7	17.5	12%	-56%
Hard Outdoor Adventure Enthusiasts Who Take Leisure Trips to Canada	**3.2**	**3.8**	**20%**	**-25%**
Other CTC Activity Groups - Leisure Trips in Canada				
Winter Outdoor Activity Participants	3.7	4.7	26%	-2%
Soft Outdoor Adventure Enthusiasts	7.1	8.8	25%	-7%
Alpine Skiing	4.6	5.7	25%	-8%
Heritage Enthusiasts	8.3	12.3	47%	76%
Performing Arts Enthusiasts	3.8	5.1	35%	30%
Visual Arts Enthusiasts	7.0	9.2	31%	16%
Wine/Culinary Enthusiasts	5.5	7.5	35%	31%

Source: Special TAMS U.S.A. Special Calculations

5. Appendix

5.1 TAMS Definitions

The Travel Activities and Motivation Survey (TAMS) An association of Canadian tourism ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of leisure travel among Canadians and Americans. This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the 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.

TAMS consisted of both a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents 18 years of age or over were selected randomly within the household. People participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mailback questionnaire. Usable questionnaires were received from 5,490 Canadians and 6,405 (26.0%) U.S. respondents.

Projections to the TAMS Data Base The Canadian population 18 years of age or older was projected to the year 2026 and the corresponding USA population was aged to the year 2025. A special additional adjustment was made in the re-weighting of TAMS data to take into account an anticipated increase in the rate of educational achievement within the populations of both countries. In particular, it was assumed that the incidence of the highest level of education achieved in the period 1975 to 1999 represents a long term equilibrium of educational achievement. Figures for each sampling unit used in TAMS were supplied for aging the Canadian population and the USA by Ontario's Ministry of Tourism and Recreation (MTR). These projections included MTR's adjustments for increased educational achievement and immigration flows for Canada.

Activity Segments of Interest to the Canadian Tourism Commission

Following are the TAMS variables that were combined to create activity-based sub-markets of special interest to the Canadian Tourism Commission.

High Intensity Soft Outdoors - Minimum of two of the following from the TAMS "activities on trips in past two years" list and not already categorized as "High Intensity Hard Outdoor Adventure": recreational biking, biking as an overnight touring trip, any motorcycling, kayaking or canoeing, motor boating, sailing, wind surfing, hiking/backpacking, horseback riding, hot air ballooning, cross-county skiing, downhill skiing, snowboarding, any snowmobiling. May include consumptive outdoor activities (hunting/fishing).

High Intensity Hard Outdoors - Took trip to experience adventure and excitement in past two years and engaged in at least one of the following activities ice or rock climbing, mountain biking; dog sledding; hang-gliding; bungee jumping; heli-skiing; scuba diving. May include consumptive outdoor activities (hunting/fishing).

High Intensity Wine/Culinary - Any of: Stay at cooking school, wine tasting school or gourmet restaurant with accommodation on the premises; or minimum of 2 of the following: touring a region's wineries; going to wineries for day visits; dining at internationally acclaimed restaurants.

High Intensity Performing Arts - At least one of experiences: different cultures/ways of life; experience city life; at least three of music festivals; literary festivals or events; theatre festivals; opera; ballet or other dance; theatre; classical music concerts; jazz music concerts; musical attractions such as Jazzland.

High Intensity Visual Arts - At least one of experiences: different cultures/ways of life; experience city life; at least two of art galleries; international film festivals; shop or browse – local arts & crafts studios.

High Intensity Heritage - At least one of experiences: different cultures/ways of life; visit historical sites/important places in history; participate in hands-on learning experience; at least four of Aboriginal cultural experiences in remote/rural setting; Pow Wow/other Aboriginal celebration; Aboriginal attractions; French Canadian cultural experiences; carnivals such as Caribana; western theme events; farmers' fairs or markets; local festivals or fairs; children's museums; general history museums; science or technology museums; historical replicas of cities/towns; historic sites; pick your own farms / harvesting.

Any Alpine - alpine skiers (alpine, heli skiing, snowboarding) and/or ski package.

Any Other Winter - Any of: ice climbing, dog sledding, ice fishing, snowmobiling, cross country skiing (any or as a touring trip) [excludes alpine skiers and snowboarders].

5.2 Unweighted Base Sizes

Table A-1: Activity-Based Market Segments: Unweighted Base Sizes From the U.S. TAMS Mailback Questionnaire

	UNWEIGHTED RECORDS – MAILBACK
Adult Leisure Travellers to Canada in the Past 2 Years	1,509
Soft Outdoor Adventure Enthusiasts	419
Hard Outdoor Adventure Enthusiasts	**177**
Wine/Culinary Enthusiasts	341
Heritage Enthusiasts	498
Performing Arts Enthusiasts	244
Visual Arts Enthusiasts	429
Winter Outdoors (excluding alpine skiing)	227
Alpine Skiing	254

Source: Special TAMS U.S.A. Tabulations, page 1.
Note: Segments are based on past two year leisure travel to a Canadian destination and participation in a pre-defined set of activities while on trips taken to any destination in the past two years.

5.3 Additional Summary Tables

Table A-2: U.S.A. Hard Outdoor Adventure Enthusiasts – Census Regions

	USA Adults	Recent Travellers to Canada	
	Total 200.4 million	Total 26.3 million	Hard Outdoor Adventure 3.2 million
New England	5%	8%	6%
Mid Atlantic	14%	19%	17%
South Atlantic	18%	12%	13%
East North Central	16%	23%	26%
West North Central	7%	5%	3%
East South Central	6%	3%	3%
West South Central	11%	5%	6%
Mountain	6%	6%	8%
Pacific	15%	18%	19%

Source: Special TAMS Tabulations, pages 1; 23. Percentages may not add to 100 per cent due to rounding.

Table A-3: Shifts in USA Adult Population – U.S. Census Regions

	U.S.A. Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Numbers in millions	2000	2025		
Total USA	**200.4**	**254.3**	**27%**	
New England	10.2	11.9	16%	-39%
Mid Atlantic	28.9	32.2	11%	-59%
South Atlantic	36.9	49.4	34%	26%
East North Central	32.9	36.4	10%	-61%
West North Central	13.9	16.5	19%	-30%
East South Central	12.1	15.2	25%	-5%
West South Central	21.6	29.2	35%	31%
Mountain	12.1	17.4	43%	60%
Pacific	30.4	44.3	46%	69%

Source: Special TAMS U.S.A. Tabulations, Table 5.

5.4 Definition of USA Tiers

In TAMS analysis, the following states were assigned to three tiers, based on their distance from the USA/Canada border.

Tier I (Canada's Border States): Washington, Montana, North Dakota, Minnesota, Wisconsin, Michigan, New York, Vermont, New Hampshire, Maine, Alaska.

Tier II: Oregon, Idaho, Wyoming, South Dakota, Nebraska, Iowa, Illinois, Indiana, Ohio, Pennsylvania, Massachusetts, Connecticut, Washington D.C., Virginia, Maryland.

Tier III: Nevada, Utah, Colorado, Kansas, Missouri, Kentucky, Tennessee, West Virginia, Delaware, New Jersey, Rhode Island, California, Arizona, New Mexico, Texas, Oklahoma, Arkansas, Louisiana, Mississippi, Alabama, Georgia, North Carolina, South Carolina, Florida, Hawaii.

5.5 Activities Measured in TAMS

Codes For NET Activities: TAMS

Bird watching
Whale watching
Other wildlife viewing
Wildflowers / flora viewing
Recreational biking
Mountain biking
Biking – as an overnight touring trip
Motorcycling – day excursions on an overnight touring trip
Motorcycling – as an overnight touring trip
Kayaking or canoeing
Motor boating
Sailing

Wind surfing

White water rafting

Ice climbing
Rock climbing

Dog sledding
Seeing northern lights or other arctic experiences
Fishing – fresh water
Fishing – salt water
Ice fishing
Working out in a fitness centre
Jogging outdoors

Going on picnics in park settings
Golfing – play an occasional game while on a trip

Golfing – stay at a golf resort for one or more nights
Golfing – take a packaged golf tour to play on various courses

Hang-gliding
Hiking or back-packing in wilderness settings
Horseback riding
Hot air ballooning
Hunting – big game
Hunting – birds or small game
Parachuting

Bungee jumping

Playing baseball or softball
Playing basketball
Going bowling
Playing chess or backgammon
Curling
Playing football
Playing ice hockey
Playing squash
Playing soccer
Playing tennis
Playing volleyball
Ice skating
In-line / roller skating

Professional football games (as a spectator)
Professional golf tournaments (as a spectator)
Professional ice hockey games (as a spectator)
Horse races

National or international sporting events such as the Olympic

Skiing – cross country
Skiing – cross country as an overnight touring trip
Skiing – downhill
Heli-skiing
Snowboarding
Snowmobiling – day use on organized trail
Snowmobiling – as an overnight touring trip
Sunbathing or sitting on a beach
Scuba diving
Swimming in lakes
Swimming in oceans
Aboriginal (e.g., Native American) cultural experiences in a remote or rural setting where you stayed for one or more nights
Pow Wows or other aboriginal (e.g., Native American) celebrations, such as the Wikwemikong Pow-Wow
Aboriginal (e.g., Native American) attractions such as the Indian Museum of North America in Arizona or the Polynesian Cultural Centre in Hawaii
French Canadian cultural experiences
Musical festivals such as the jazz festival in Montréal or the Chicago Blues Festival
International film festivals such as the Cannes Film Festival
Literary festivals or events
Theatre festivals
Carnivals such as Mardi Gras or Rio's Carnival
Western theme events, such as rodeos or the Calgary Stampede
Farmers' fairs or markets
Local festivals or fairs such as fall fairs, winter carnivals, Highland Games, Octoberfests, folklore festivals
Art galleries
Children's museums
General history or heritage museums

Science or technology museums such as the Smithsonian National Air and Space Museum
Opera
Ballet or other dance performances
Theatre
Concerts – classical
Concerts – jazz
Concerts – rock & roll / popular
Musical attractions such as the Rock 'n Roll Museum or Jazzland
Historical replicas of cities or towns with historic re-enactments such as Williamsburg
Historic sites such as Statue of Liberty, Acropolis or Fort Alamo
Movie theme parks like MGM studios
Science & technology theme parks like Epcot
Amusement parks like Disneyland
Garden attractions such as Cypress Gardens or Tivoli Park
Botanical gardens
Planetariums
Zoos
Aquariums
Natural wonders such as Niagara Falls or the Grand Canyon
Auto races (as a spectator)
Professional baseball games (as a spectator)
Professional basketball games (as a spectator)
Professional figure skating (as a spectator)
Scenic day or evening tours by boat
Scenic day tours by train
Going to wineries for day visits and tastings
BUSINESS ACTIVITIES
(WHILE ON A TRIP OF ONE OR MORE NIGHTS)
Attend business meetings out of town

Games (as a spectator)
Amateur sports / arts / hobby tournaments and competitions (as a spectator or participant)
Recreational dancing
Casinos
Local outdoor cafes
Movies
Restaurant dining – regional or local cooking
Restaurant dining – internationally acclaimed restaurants
Shop or browse – bookstores or music stores
Shop or browse – antiques
Shop or browse – gourmet foods in retail stores or farms
Shop or browse – local arts & crafts studios or exhibitions
Shop or browse – clothing, shoes and jewellery
Pick-your-own farms or participating in harvesting
Read for relaxation or personal interest (while on trip)
Camping – in large public campgrounds in national, state or provincial parks
Camping – in campgrounds outside national, state or provincial parks
Camping – in wilderness settings
Staying at a lakeside resort in summer
Staying at a lakeside resort in winter
Staying at a ski resort or mountain resort in summer
Staying at a ski resort or mountain resort in winter

Staying at a seaside resort in summer
Staying at a seaside resort in winter
Staying at a remote or fly-in lodge
Staying at a remote or fly-in outpost

Staying at a wilderness lodge you can drive to by car
Staying at a private cottage or condo you own
Staying at a private cottage or condo you rent
Staying at a cooking school with accommodation on the premises
Staying at a wine tasting school with accommodation on the premises
Staying at a gourmet restaurant with accommodation on the premises
Staying at a health spa
Staying at a working farm or guest ranch
Staying at a bed & breakfast
TOURING AND CRUISING (OVERNIGHT)
Guided scenic tours in the countryside, like fall colour tours where you stay one or more nights
Wandering around small towns and villages where you stay one or more nights
Touring a region's wineries where you stay one or more nights
Great Lakes cruises where you stay on board one or more nights
Submarine "cruises" where you stay on board one or more nights
Ocean cruises where you stay on board one or more nights
DAY TOURING
(WHILE ON A TRIP OF ONE OR MORE NIGHTS)
Coastal or lakeshore scenic drives in your own / rental vehicle
Guided bus day tours in a city
Scenic day tours in the countryside by bus
Scenic day tours by air

Attend trade shows out of town

Attend business conventions out of town
Attend conferences or seminars out of town
Attend company paid training out of town
Take a vacation paid for by your company (Incentive Travel)

Q.3 Getaways/Q. 8 Vacations
Took at least 1 trip in the **winter**
Took at least 1 trip in the **spring**
Took at least 1 trip in the **summer**
Took at least 1 trip in the **fall**

Q. 6 Getaways/Q.11 Vacations Use in Past 2 Years
Homes of friends & relatives
Hotels / Resorts / Country Inns

Motels

Bed & Breakfasts
Cottage, rented
Cottage, your own
Fishing or Hunting Lodges
Campgrounds / RV Parks – Fully serviced (water, sewer, electricity)
Campgrounds / RV Parks – Electricity only
Unserviced campgrounds or backcountry
Other
IF CAMPING:
What type of camping equipment did you use ***most often***?
Tent
Tent Trailer
Truck camper or van
Travel Trailer / Fifth wheel
Motorhome

Q. 15 – Package Used in past two years

Motorcoach touring package
A resort or cruise package
A theatre package
An adventure package
A ski package

A city package

An educational package
Some other type of package
Travel to Ontario
Ever
Never