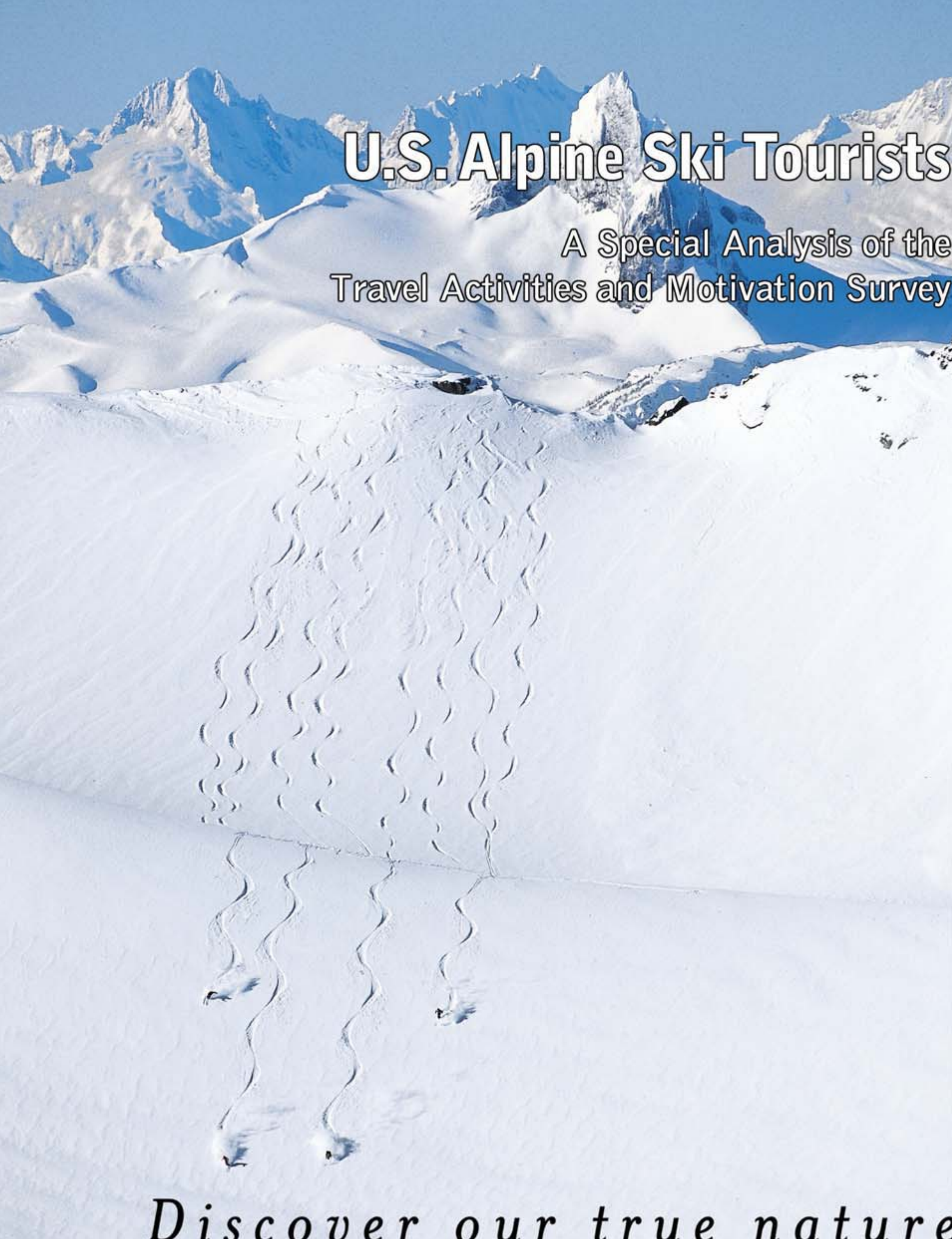
U.S. Alpine Ski Tourists

A Special Analysis of the Travel Activities and Motivation Survey



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Canada

U.S. Alpine Ski Tourists

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

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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 **Alpine Ski Tourists** – Americans who have taken leisure trips to Canada and engaged in alpine skiing when on recent trips. As such, they have taken leisure trips to Canada and, in many cases, to other destinations in the past couple of years and have included at least one of the following activities on these trips.

- Alpine skiing
- Snow boarding
- Heli-skiing
- Ski package

Alpine ski tourists may also have engaged in other winter sports activities such as cross country skiing, snowmobiling, ice fishing or ice climbing while on their travels, but these other sports are *not* used to define the group.

These tourists provide a rich source of information for tourism businesses and marketers who want to attract Alpine Ski Tourists to Canada in the future.

In addition to a *current* profile of these Americans, 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 the Alpine Ski Tourist market 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, Other Winter Outdoor Participants, Soft Outdoor and Hard Outdoor Adventure Enthusiasts.

2. Executive Summary

2.1 U.S. Alpine Ski Tourists: Market Size

Of the 200.4 million American adults in 2000, about 21.4 million are Alpine Ski Tourists (11%). 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 alpine ski products is in the range of 4.6 million American adults.

The downhill ski market draws particularly heavily on the U.S. border states but U.S. Alpine Ski Tourists are more apt to live in Tier III states – those most distant from the U.S./Canada border – than are most other segments of interest to the CTC. For example, over 4-in-10 Alpine Ski Tourists live in Tier III states compared to only 3-in-10 Americans who travel to Canada and participate in *other* winter outdoor activities such as snowmobiling or cross country skiing.

Perhaps because of the world class skiing opportunities in nearby British Columbia, Washington state residents represent more than 1-in-10 Alpine Ski Tourists to Canada but only 1-in-50 of the total U.S.A. adult population. Californians are also over-represented among Americans who take leisure trips to Canada and enjoy alpine skiing.

As a function of the predominance of Pacific region Americans in the Alpine Ski Tourist market, this group's travel patterns to Canada's regions differ somewhat from the way the "typical" American visits Canada. While skiers are most apt to have visited Ontario in the past couple of years (51%), their tendency to go to British Columbia (41%) and to Alberta (12%) is appreciably greater than is the case for the typical American visitor. Quebec too is somewhat over-represented as a destination within the skier market (29%) relative to the typical American visitation pattern (25%). In turn, regions with less developed alpine skiing products such as Ontario, Atlantic Canada and Manitoba/Saskatchewan, are somewhat under-represented as destinations for skiers.

There is a robust competitive environment for Canada within the Alpine Ski Tourist segment. These travellers display an almost universal tendency to take leisure trips *within* the United States (95%) and are also apt to travel to Mexico or the Caribbean (28%), Europe (27%) and, less commonly, to other countries (18%). These rates of overseas travel are appreciably higher than those evident for American adults in total and than those of the typical U.S. visitor to Canada.

2.2 U.S. Alpine Ski Tourists: Demographic Characteristics

Alpine Ski Tourists are more likely to be men (59%) than women (41%) and are concentrated at the younger end of the adult age spectrum. Almost two-thirds of them are between 18 and 44 years, with a higher proportion falling into the 18 to 34 year age group (36%) than in the 35 to 44 year age group (28%).

Most U.S. Alpine Skiers live in adult-only households – those with no members under the age of eighteen (65%), although one-third are likely to be in the market for alpine skiing experiences that take into account the interests and needs of teenagers or children (35%).

Alpine skiers are more affluent than is the "typical" American leisure traveller to Canada with an average household income of $74,900 (US$) compared to $65,200 (US$) for the typical visitor (1998 US dollars). Higher household incomes are consistent with higher levels of formal education: over two-fifths of these skiers have at least one university degree (43%) and a further 41 per cent have had some other form of post-secondary education.

2.3 Outdoor Activities among U.S. Alpine Ski Tourists

By definition, alpine skiers ski, use an overnight ski package, heli-ski and/or snowboard while on trips. They may have engaged in these activities while on a recent trip in Canada or on trips to other destinations, worldwide. The participation rate is highest for alpine skiing, followed by using a ski package (overnight), snowboarding and, at a considerable distance, by heli-skiing.

Ski Activities Engaged in on Trips in the Past 2 Years

- Alpine skiing (90%)
- Ski package (overnight) (28%)
- Snow boarding (17%)
- Heli-skiing (2%)

Even though they are not used to define the alpine ski segment, cross country skiing constitutes a trip activity for about 1-in-5 of these American downhill skiers and snowmobiling attracts about 1-in-7.

While on trips, over half of these American skiers view wildlife and two-fifths hike or backpack in wilderness settings. Approximately one-third cycle, golf, kayak or canoe, fish in fresh water, view wildflowers and other flora, and/or go motor boating while on trips. About one-quarter might be found watching whales or white water rafting. This wide array of popular outdoor activities on recent trips is suggestive of a market segment that enjoys the outdoors during *all seasons.*

Approximately half of U.S. alpine skiers went to zoos, aquariums, general history museums and art galleries on recent trips and somewhat fewer have been to live theatre performances, botanical gardens, and/or casinos on their trips. Since these attractions tend to be *indoors*, when packaged with skiing, they may provide welcome relief from the cold alpine slopes.

2.4 Overlap With Other Activity-Based Segments

Over half of Alpine Ski Tourists with recent Canadian leisure travel experiences are also Soft Outdoor Adventure Enthusiasts (54%) and about one-third are Heritage Tourism Enthusiasts (37%) or Visual Arts Enthusiasts (36%). Somewhat fewer are Wine/Culinary Enthusiasts (27%).

These overlaps suggest packaging, product development and marketing opportunities: sub-groups within the alpine ski segment might be attracted by *combinations* of products that meet their winter outdoor interests as well as their interests in museums, galleries, theatre, and food and wine experiences.

2.5 Image Challenges & Media Sources

Canada is most highly rated by alpine skiers for attributes that support a beautiful, relaxing, clean but somewhat sedate 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 with lots of things for mature adults to see and do
- A very safe place for visitors.

This market segment considers Canada to be a place with lots of things for families to see and do, that respects the natural environment, has friendly people, is one of the best destinations for outdoor activities, and has a lot for young people to see and do.

Less favourable ratings are accorded attributes associated with shopping opportunities, value for money, and cultural and urban attractions. American Alpine Ski Tourists are least positive about Canada 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 would be expected that ski enthusiasts would have a more favourable attitude toward Canada as a winter destination than do Americans who travel to Canada as a whole . . . and they do, but barely. These winter travellers rate Canada more favourably for its winter tourism experiences (7.0 on a ten point scale) than do American travellers to Canada as a whole (6.3 on a ten point scale). Nonetheless, skiers rate Canada significantly better as a summer destination (7.6 on a ten point scale) than as a place to go in the winter.

Image building and product awareness messages to alpine skiers 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 skiers among those measured in the survey.

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 U.S. Alpine Ski Tourists

There will be an increase in the absolute number of Americans who will be in the market for alpine skiing between 2000 and 2025, from an estimated 21.4 million now to about 25.7 million in 2025. Canada's likely share of this market – those who will elect to alpine ski and take leisure trips to Canada – is also expected to grow, from 4.6 million to 5.7 million.

These growth rates are *lower* than the population growth rate of the U.S.A. as a whole, primarily because alpine skiers tend be younger people. 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 alpine skiing – 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.

At the same time, Mountain and Pacific region states will experience the most dramatic population growth in the U.S. over the next two decades. The three Pacific states – California, Oregon and Washington – will increase from about 30 million now to over 44 million in two decades. Since the alpine skiers for Canada are heavily concentrated in the Pacific region, projected growth for this part of the United States should benefit Canada's alpine ski market in the medium to long term.

2.8 Summary

The Alpine Ski market for Canada from the U.S.A. is characterized by its youth, affluence and high incidence of post-secondary education. There are also more men than women in this market segment.

The market is highly concentrated in Pacific states and is particularly prone to visit British Columbia and Alberta.

Warm weather outdoor activities including wildlife and flora viewing, hiking and backpacking, fishing, canoeing or kayaking and cycling are also quite popular among these winter enthusiasts. There is moderate interest in live theatre, museums and art galleries that could prove to be useful in packaging indoor product for alpine skiers.

Of the market segments of special interest to the CTC, Alpine Skiers currently represent a *mid-size* group of potential visitors from the United States – almost 21.4 million adult Americans. Of this pool, Canada currently attracts about one-fifth (4.6 million), leaving ample opportunity for growth.

Despite the size of the potential market in the U.S.A. and expected population growth in the Pacific region, retention of alpine skiers will become increasingly difficult as the U.S. population ages.

Promotion of Canada's alpine ski products will have to take into account the ability of various regions of the country to *deliver* on expectations. With changing climate and snow cover levels, ensuring appropriate winter conditions for downhill skiing may become an increasing challenge for many of Canada's tourism regions.

3. U.S. Alpine Ski Tourists – 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 Soft Outdoor Adventure Enthusiasts, Wine and Culinary Enthusiasts, Alpine Ski Tourists, Other Winter Outdoor Activity Participants (non-alpine), Heritage Enthusiasts, Visual Arts Enthusiasts, and Performing Arts Enthusiasts (see Appendex 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 Alpine Ski Tourist segment.

Of the 200.4 million American adults in 2000, about 21.4 million are Alpine Ski Tourists (11%). 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 alpine ski products is in the range of 4.6 million American adults.

Table 1: U.S.A. Alpine Ski Tourists –
Market Size & Comparisons With Other Segments

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Alpine Skiers
Adults 18+	*200.4 million*	*26.3 million*	*4.6 million*
Alpine Skiing	**21.4**	**4.6**	**4.6**
Soft Outdoor Adventure	35.5	7.1	2.5
Hard Outdoor Adventure	15.7	3.2	1.4
Wine/Culinary	21.6	5.5	1.3
Heritage	34.5	8.3	1.7
Performing Arts	15.6	3.8	1.0
Visual Arts	27.6	7.0	1.7
Winter Outdoors	15.0	3.7	1.5

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

Of the activity-based markets of special interest to the CTC, Alpine Ski Tourists is a *mid-sized* segment. At 21.4 million, there are more of them than would be found in the Performing Arts (15.6 million) or Other Winter Outdoor market segments (15.0 million), but fewer than Soft Outdoor Adventure Enthusiasts (35.5 million), Heritage Tourism Enthusiasts (34.5 million), Visual Arts Enthusiasts (27.6 million) or Wine & Culinary Enthusiasts (21.6 million).

Within the sub-group of Americans who have recent travel experience in Canada, the 4.6 million Alpine Ski Tourists represent a smaller market than those cited above, but include more American adults than do the Performing Arts Enthusiast (3.8 million), Other Winter Outdoor Participant (3.7 million) and Hard Outdoor Adventure tourist segments (3.2 million).

Over half of U.S. Alpine Ski Tourists with recent Canadian leisure travel experiences are also Soft Outdoor Adventure Enthusiasts (54%), about one-third are Heritage Tourism Enthusiasts (37%), Visual Arts Enthusiasts (36%) or engage in other winter sports (33%) and one-quarter are Wine/Culinary Enthusiasts (27%). These overlaps suggest packaging, product development and marketing opportunities: sub-groups within the alpine ski segment might be attracted by *combinations* of products that meet their winter outdoor adventure interests as well as their interests in museums, galleries, Aboriginal events, theatre, other live performances, and food and wine experiences.

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 alpine skiers live in Tier I states – those immediately adjacent to the Canadian border. About one-fifth of *all* American adults live in these border states (18%) but those who come to Canada and take trips on which they ski represent one-quarter the total market (26%). While the downhill ski 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. Alpine Ski Tourists

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Alpine Skiers
Adults 18+	*200.4 million*	*26.3 million*	*4.6 million*
Tier I (Border States)	18%	33%	26%
Tier II	28%	32%	32%
Tier III	54%	35%	43%

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

Although Canada is less successful in attracting Americans living considerable distances from the U.S./ Canada border than it is in attracting tourists from "near" markets, Alpine Ski Tourists are more apt to live in Tier III states (43%) than are most other segments of interest to the CTC. For example, over 4-in-10 Alpine Ski Tourists live in Tier III states compared to only 3-in-10 Americans who travel to Canada and participate in *other* winter outdoor activities such as snowmobiling or cross country skiing.

One U.S. Census Region – Pacific – is appreciably over-represented within the Alpine Ski Tourist segment. This region represents 15 per cent of all American adults and 18 per cent of *all* those who claim to have travelled to Canada in the past couple of years, but represents 27 per cent of the alpine ski market. Perhaps because of the world class skiing opportunities in nearby British Columbia, Washington state residents represent more than 1-in-10 Alpine Ski Tourists to Canada but only 1-in-50 American adults. Californians are also over-represented among Americans who take leisure trips to Canada and enjoy alpine skiing. This state represents 11 per cent of all adult Americans but 16 per cent of the Alpine Ski Tourist market for Canada. For more regional information, please refer to Summary Table A-2, appended.

As a function of the predominance of Pacific region Americans in the Alpine Ski Tourist market, this group's travel patterns to Canada's regions differ somewhat from the way the "typical" American visits Canada. While these skiers are most apt to have visited Ontario in the past couple of years (51%), their tendency to go to British Columbia (41%) and to Alberta (12%) is appreciably greater than is the case for the typical American visitor. Quebec too is somewhat over-represented within the skier market (29%) relative to the typical American visitation pattern (25%). In turn, regions with less developed alpine skiing products such as Ontario, Atlantic Canada and Manitoba/Saskatchewan, are somewhat under-represented as destinations for skiers.

There is a robust competitive environment for Canada within the Alpine Ski Tourist segment. These travellers display an almost universal tendency to take leisure trips *within* the United States (95%) and are also apt to travel to Mexico or the Caribbean (28%), Europe (27%) and, less commonly, to other countries (18%). These rates of overseas travel are appreciably higher than those evident for American adults in total and than those of the typical U.S. visitor to Canada.

Table 3: U.S.A. Alpine Ski Tourists – Destinations Visited in Past 2 Years

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Alpine Skiers
Adults 18+	*200.4 million*	*26.3 million*	*4.6 million*
Canadian Destinations	13%	100%	100%
Atlantic Canada	2%	12%	6%
Quebec	3%	25%	29%
Ontario	7%	55%	51%
Manitoba/Saskatchewan	1%	7%	6%
Alberta	1%	10%	12%
British Columbia	4%	30%	41%
Territories	1%	4%	2%
Other Destinations			
Any U.S.A. Destination	69%	93%	95%
Mexico/Caribbean	15%	25%	28%
U.K./Other Europe	8%	18%	27%
Other Countries	7%	15%	18%
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 Alpine Ski Tourists

Alpine Ski Tourists are more likely to be men (59%) than women (41%) and are concentrated at the younger end of the adult age spectrum. Almost two-thirds of them are between 18 and 44 years, with a higher proportion falling into the 18 to 34 year age group (36%) than in the 35 to 44 year age group (28%).

Table 4: Demographics of U.S.A. Alpine Ski Tourists – Gender & Age

	Recent Leisure Travellers to Canada	
	Total	Alpine Skiers
Adults 18+	*26.3 million*	*4.6 million*
Men	51%	59%
Women	49%	41%
18 - 34 years	24%	36%
35 - 44 years	20%	28%
45 - 54 years	20%	17%
55 - 64 years	14%	9%
65+ years	17%	5%
Average Age	47.3 years	40.1 years

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

Compared to the total market for Canadian leisure experiences over the past couple of years, Alpine Ski Tourists are substantively under-represented among older Americans. One-third as many of these skiers are 65 years of age or older (5%) as is the case among recent American leisure travellers to Canada as a whole (17%). The over-representation of younger Americans and under-representation of older Americans explain why the average alpine skier is only 40 years of age, compared to the 47 year average of the "typical" American visitor to Canada.

Skiers and snow boarders span the income and education spectrums but are concentrated at the highly educated and affluent ends. Nonetheless, one-fifth of them fall 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; and over one-quarter say their income is between $60,000 to $100,000 US. Incomes in excess of $100,000 US are characteristic of close to one-third of these outdoor enthusiasts (31%).

Table 5: Demographics of U.S.A. Alpine Ski Tourists – Income & Education

	Recent Leisure Travellers to Canada	
	Total	Alpine Skiers
Adults 18+	*26.3 million*	*4.6 million*
Household Income		
Under $40,000	26%	22%
$40,000 - $59,999	24%	19%
$60,000 - $99,999	31%	28%
$100,000 or more	19%	31%
Average	$65,200 US	$74,900 US
Education		
Some Secondary or Less	6%	2%
Completed Secondary	19%	14%
Some Post Secondary	45%	41%
Graduated University	30%	43%

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 Alpine Ski Tourists are more affluent than is the "typical" American traveller to Canada, with fewer skiers in the lowest income group and 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 alpine ski market – $74,900 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: over one-third of Alpine Ski Tourists have at least one university degree (43%) and a further 41 per cent have had some other form of post-secondary education.

Most Alpine Ski Tourists live in adult-only households – those with no members under the age of eighteen (65%), although one-third are likely to be in the market for ski or other winter outdoor tourism experiences that take into account the interests and needs of teenagers or children (35%). While adult-only households predominate among skiers, these Americans are somewhat more likely to live in households with children under twelve years of age (27%) than is the typical leisure tourist to Canada from the U.S.A. (22%). The greater likelihood of children in the household is undoubtedly related to the comparative youthfulness of the alpine ski market segment.

Table 6: Demographics of U.S.A. Alpine Ski Tourists – Household Composition

	Recent Leisure Travellers to Canada	
	Total	Alpine Skiers
Adults 18+	*26.3 million*	*4.6 million*
Adult Only	71%	65%
Any Teens/Children	29%	35%
Any Children under 12	22%	27%

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

3.4 Travel Activities Among Alpine Ski Tourists

3.4.1 Winter Outdoor Activities

Of the activities used to define Alpine Ski Tourists, downhill skiing has almost universal participation (90%), followed by ski packages for getaways or longer holidays (28%) and, at some distance, snow boarding (17%). Heli-skiing remains a *niche* activity, with only 1-in-50 skiers with recent Canadian travel experience claiming to have engaged in the sport in the past couple of years.

Table 7: U.S.A. Alpine Ski Tourists – Activities Used To Define Market Segment

	Alpine Skiers
Adults 18+	*4.6 million*
Defining Activities	
Downhill skiing	90%
Ski package	28%
Snowboarding	17%
Heli skiing	2%
Other Winter Activities	
Cross-county skiing	22%
Snowmobiling (net)	14%
Day use	13%
Overnight touring	3%
Ice fishing	5%
Dog sledding	3%
Ice climbing	2%

Source: Special TAMS Tabulations, page 8.

There is surprisingly little overlap between downhill skiing and other winter outdoor activities. For example, only about one-fifth of alpine skiers say that they went cross-country skiing on a trip in the past couple of years (22%) and even fewer have been snowmobiling (14%). Ice fishing, dog sledding and ice climbing are not widely popular among American alpine ski tourists who travel to Canada.

3.4.2 Other Outdoor Activities

The popularity of many warm weather outdoor activities among Alpine Ski Tourists is consistent with the high level of overlap between these Americans and the Soft Outdoor Adventure Enthusiast segment. While on trips, over half of these American skiers view wildlife and two-fifths hike or backpack in wilderness settings. Approximately one-third cycle, golf, kayak or canoe, fish in fresh water, view wildflowers and other flora, and/or go motor-boating while on trips. About one-quarter might be found watching whales or white water rafting. This wide array of popular outdoor activities on recent trips is suggestive of a market segment that enjoys the outdoors during *all seasons.*

Table 8: U.S.A. Alpine Ski Tourists – Other Outdoor Activities

	ALPINE SKIERS
Adults 18+	*4.6 million*
Wildlife viewing	51%
Hiking/backpacking in wilderness settings	41%
Cycling	37%
Golfing	37%
Kayaking or canoeing	32%
Fishing - fresh water	31%
Wildflowers/flora viewing	30%
Motor boating	30%
Whale watching	24%
White water rafting	22%
Fishing - salt water	18%
Sailing	18%
Hunting	15%
Bird watching	14%
Rock climbing	10%

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

3.4.3 Heritage Activities

As noted earlier, there is some overlap between the 4.6 million Alpine Ski Tourists and the group of American travellers who are defined as Heritage Enthusiasts. The heritage experiences that might prove most attractive to downhill skiers include general history museums, local festivals and fairs as well as science and technology museums. These heritage experiences have attracted at least two-fifths of the alpine ski segment while on a trip in the past couple of years.

Table 9: U.S.A. Alpine Ski Tourists – Heritage Activities

	ALPINE SKIERS
Adults 18+	*4.6 million*
General history museums	47%
Local festivals or fairs	41%
Science & tech museums	41%
Historic sites	38%
Farmers' fairs or markets	31%
Historical replicas of cities/towns	26%
Children's museums	20%
Pow Wow/other Aboriginal celebrations/attractions	19%
Pick your own farms / harvesting	17%
French Canadian cultural experiences	17%
Western theme events	12%
Carnivals such as Caribana/ Mardi Gras or Rio's Carnival	10%

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

Other heritage attractions widely sought by downhill skiers while on their travels include historic sites, farmers' fairs or markets, and replicas of historic towns or cities. These heritage activities – along with visits to general history museums, winter festivals or fairs and science and technology museums – might be packaged with alpine ski experiences to attract U.S. skiers.

3.4.4 Performing & Visual Arts Activities

With the exception of live theatre performances (42%), there is not a great deal of overlap between Alpine Ski Tourists and activities that characterize Performing Arts Enthusiasts when they travel.

Table 10: U.S.A. Alpine Ski Tourists – Performing & Visual Arts Activities

	ALPINE SKIERS
Adults 18+	*4.6 million*
Performing Arts	
Theatre	42%
Ballet or other dance	17%
Music festivals	17%
Jazz music concerts	16%
Classical music concerts	15%
Opera	14%
Theatre festivals	11%
Musical attractions such as Jazzland	10%
Literary festivals	6%
Visual Arts	
Local arts & crafts studios	62%
Art galleries	53%
International film festivals	5%

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

Conversely, shopping or browsing in local arts and crafts studios (62%) and, to a lesser extent, going to art galleries (53%) are fairly widely sought by skiers while on their trips. These activities that characterize the Visual Arts Enthusiast segment might be paired with alpine ski 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 about half of those who have visited Canada in the past couple of years and are alpine skiers claim to have gone to a zoo or aquarium while on trips in the recent past. Approximately one-third have also gone to a casino and/or botanical garden while on trips. Since these attractions are *indoors,* they may provide welcome relief to Americans on trips in which they spend time on the lifts and slopes.

Table 11: U.S.A. Alpine Ski Tourists – Other Activities

	ALPINE SKIERS
Adults 18+	*4.6 million*
Zoos	50%
Aquariums	47%
Casinos	38%
Botanical gardens	32%
Planetariums	19%
Horse races	11%
Auto races	11%

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

3.5 Ratings of Canada

Alpine Ski Tourists 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 downhill ski market who refrain from offering an opinion.

In this context, Canada is most highly rated by alpine skiers for attributes that support a beautiful, relaxing, clean but somewhat sedate 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 with lots of things for mature adults to see and do
- A very safe place for visitors.

This market segment also considers Canada to be a place with lots of things for *families to see and do*, that *respects the natural environment*, has *friendly people*, is one of the best destinations for *outdoor activities*, and has a lot for *young people to see and do*. Of those who provide a rating, Canada is also rated favourably for being a great place for *hunting* but half of the Americans in the ski 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 Alpine Ski Tourists are least positive about Canada 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 would be expected that ski enthusiasts would have a more favourable attitude toward Canada as a *winter destination* than do Americans who travel to Canada as a whole . . . and they do, but barely. These winter travellers rate Canada more favourably for its winter tourism experiences (7.0 on a ten point scale) than do American travellers to Canada as a whole (6.3 on a ten point scale). Nonetheless, skiers rate Canada significantly better as a *summer* destination (7.6 on a ten point scale) than as a place to go in the *winter*.

Table 12: U.S.A. Alpine Ski Tourists – Attitudes Toward Canada

	Recent Leisure Travellers to Canada		
	Total	Alpine Skiers	
Adults 18+	*26.3 million*	*4.6 million*	
	Average #	Average #	Can't Rate %
Beautiful scenery	9.2	9.3	3%
Great place for fishing	8.7	8.7	37%
Great place to relax	8.6	8.6	5%
Clean/well cared for	8.7	8.6	4%
Lots for mature adults	8.6	8.4	12%
Great place for hunting	8.4	8.4	52%
Safe for visitors	8.3	8.4	8%
Lots for families	8.5	8.3	13%
Respects natural environment	8.5	8.3	10%
Place with friendly people	8.4	8.3	4%
One of best destinations for outdoor activities	8.2	8.2	13%
Lots for young adults	8.1	8.1	19%
Great place to experience adventure & excitement	8.0	8.0	13%
Offers excellent value for money	7.9	7.8	10%
One of best summer destinations	8.1	7.6	12%
Place with interesting shops	8.0	7.6	16%
Great place to experience city life	7.7	7.5	12%
Many cultural events & attractions	7.8	7.4	13%
Great place to experience different cultures	7.6	7.1	17%
One of best winter destinations	6.3	7.0	15%
Place for romance	7.2	6.9	20%
Great place to see historic sites	7.5	6.8	15%
Great place for Aboriginal culture	7.4	6.8	39%
Great place to experience "good life"	7.1	6.7	24%
Popular, trendy place	6.6	6.3	18%

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 Alpine Ski Tourists

There are several measures within TAMS that may help marketers reach American skiers with their messages:

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

Americans in the alpine ski segment are avid local newspaper readers. Furthermore, about half of them claim to read the travel section of weekday editions of daily newspapers on a regular basis and almost three-fifths claim to read or look through the travel section of the weekend editions of a local newspaper.

Table 13: U.S.A. Alpine Ski Tourists – Print Media Read Regularly

	ALPINE SKIERS
Adults 18+	*4.6 million*
Daily Newspaper (Any)	**88%**
Weekday edition	79%
Travel section of weekday edition	50%
Weekend edition	79%
Travel section of weekend edition	59%
Community newspapers	68%
Any Magazines	**94%**
News magazines	48%
Hobby magazines	43%
Travel magazines	39%
National Geographic	35%
Sports magazines	35%
Fashion/homemaking magazines	26%
General interest/city life magazines	23%

Source: Special TAMS Tabulations, page 14.

They are also avid magazine readers (94%), with about 4-in-10 claiming to read hobby and/or travel magazines on a regular basis.

Daily and weekend newspapers may have better reach among alpine skiers than does any particular type of television programming. Seven-in-ten of these tourists say they watch televised movies on a regular basis and only slightly fewer claim to watch professional sports shows regularly. Nature show broadcasts are also particularly popular within this market segment (61%), followed by evening sitcoms (58%), the early evening news (54%) and evening dramas (53%).

Table 14: U.S.A. Alpine Ski Tourists – Television Programs Viewed Regularly

	ALPINE SKIERS
Adults 18+	4.6 million
Movies	70%
Professional sports	65%
Nature shows	61%
Evening sitcoms	58%
Early evening news	54%
Evening drama	53%
Late evening news	47%
Instructional/hobby shows	36%
Morning news	32%
Daytime programs on weekdays	12%

Source: Special TAMS Tabulations, page 16.

In light of the fact that over one-quarter of Alpine Ski Tourists 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 ski enthusiasts.

Overlap with the heritage and visual arts segments is manifest in the comparatively robust level of membership in art galleries and museums among alpine skiers (19%). Membership lists from these types of attractions in the U.S.A. and from nature organizations (19%) may be ways to reach alpine skiers in the market for tourism experiences that blend outdoors, culture and nature.

Over one-fifth of these American alpine skiers say that they attend *boat* shows on a regular basis. This type of venue may prove to be an important marketing channel to get information about Canada's alpine ski products to potential American tourists.

Table 15: U.S.A. Alpine Ski Tourists – Club/ Organization Memberships & Consumer Trade Show Attendance

	ALPINE SKIERS
Adults 18+	*4.6 million*
Club/Organization Membership	
Auto club	50%
Sports club	44%
Art gallery/museum	19%
Nature organization	19%
Zoo/botanical garden	14%
Gardening club	4%
Regular Attendance at Travel/Trade Shows	
Boat shows	22%
Sportsmen's shows	16%
RV/Camper shows	13%
Travel shows	10%

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 alpine ski 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).

Since the alpine skiers for Canada are heavily concentrated in the Pacific region, projected growth for this part of the United States should benefit Canada's alpine ski market in the medium to long term.

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	% of Adult Population In . . . 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	% of Adult Population In . . . 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 Alpine Ski Tourists

As noted in the demographic profile section of this report, the Alpine Ski Tourist segment tends to attract comparatively young travellers and those with no children living in the household. Older Americans, and particularly those over 65 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 and childless one, the very characteristics that define Alpine Ski Tourists help explain why growth in this market is predicted to be 24 per cent **lower** than would have been expected given today's population structure. The total Alpine Ski Tourist market in the U.S.A. is predicted to grow from 21.4 million in 2000 to 25.7 million by 2025.

A similar pattern is evident for changes in the Alpine Ski Tourist segment that takes leisure trips to Canada. This population is expected to increase from 4.6 million now to 5.7 million in 2025. This growth rate, at 25 per cent, is about 8 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 alpine skiers 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%	
Alpine Ski Tourists	21.4	25.7	20%	-24%
Alpine Ski Tourists Who Take Leisure Trips to Canada	**4.6**	**5.7**	**25%**	**-8%**
Other CTC Activity Groups - Leisure Trips in Canada				
Soft Outdoor Adventure Enthusiasts	7.1	8.8	25%	-7%
Other Winter Outdoors	3.7	4.7	26%	-2%
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 behavior 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 minimum of two of the following activities if one activity is white water rafting; if no white water rafting, any one of: 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. Alpine Ski Tourists – Census Regions

	USA Adults	Recent Travellers to Canada	
	Total 200.4 million	Total 26.3 million	Alpine Ski Tourists 4.6 million
New England	5%	8%	7%
Mid Atlantic	14%	19%	11%
South Atlantic	18%	12%	15%
East North Central	16%	23%	19%
West North Central	7%	5%	5%
East South Central	6%	3%	1%
West South Central	11%	5%	8%
Mountain	6%	6%	7%
Pacific	15%	18%	27%

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