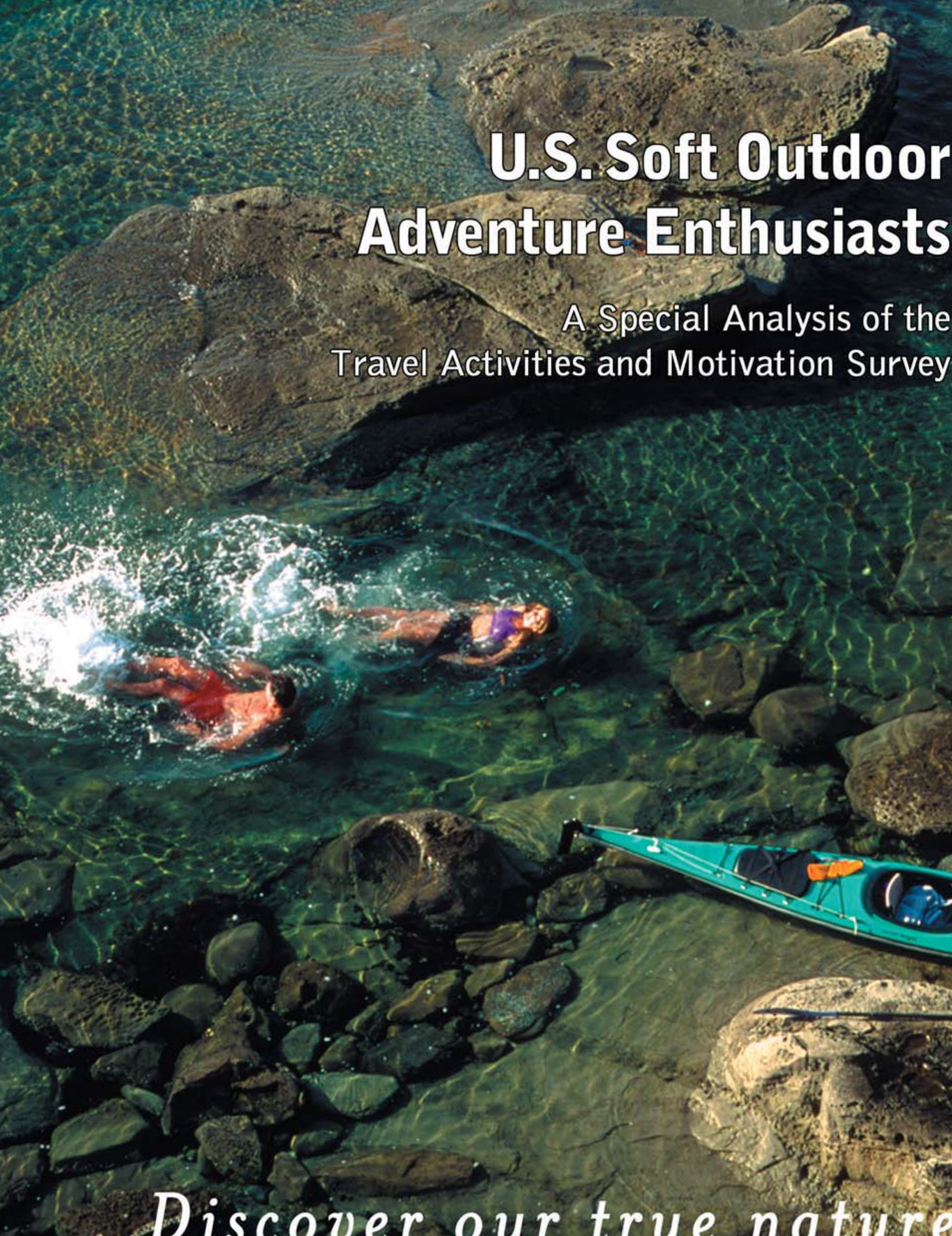

U.S. Soft Outdoor Adventure Enthusiasts

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. Soft Outdoor Adventure Enthusiasts

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

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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 **Soft Outdoor Adventure Enthusiasts** – Americans who have had some recent Canadian tourism experience and exhibit a particular interest in soft outdoor adventure. As such, they have taken leisure trips to Canada and, in most cases, to other destinations in the past couple of years and have included at least two of the following activities on these trips.

- biking
- motorcycling
- kayaking or canoeing
- motor boating
- sailing
- wind surfing
- hiking/backpacking
- horseback riding
- hot air ballooning
- cross-county skiing
- downhill skiing
- snowboarding
- snowmobiling

These tourists provide a rich source of information for tourism businesses and marketers who want to attract Soft Outdoor Adventure Enthusiasts to Canada in the future.

In addition to a *current* profile of Soft 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 the Soft Outdoor Adventure Enthusiast 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, Winter Outdoor Activity Participants, Alpine Ski Tourists, and Hard Outdoor Adventure Enthusiasts.

2. Executive Summary

2.1 Soft Outdoor Adventure Enthusiasts: Market Size

Of the 200.4 million American adults in 2000, about 35.5 million are Soft Outdoor Adventure Enthusiasts (18%). Of these, about 2-in-10 claim to have visited Canada on a leisure trip in the past two years. Thus, Canada's market for the soft outdoor adventure segment is close to 7.1 million American adults.

Canada draws a disproportionately high number of its Soft Outdoor Adventure Enthusiasts from border states: 18 per cent of the total U.S.A. population live in states on the Canada/U.S. border while 33 per cent of Soft Outdoor Adventure Enthusiasts who come to Canada do so. Attracting Soft Outdoor Adventure Enthusiasts from the long haul U.S.A. markets poses a greater challenge: 54 per cent of Americans live in Tier III states but only 36 per cent of Soft Outdoor Adventure Enthusiasts who come to Canada live in this southern band of states.

Over half of the tourists who comprise this outdoor segment have been to Ontario on recent trips, one-third have been to British Columbia and one-fifth have been to Quebec. Other regions, including Atlantic Canada, Alberta and Manitoba/Saskatchewan have each attracted less than one-tenth of the Soft Outdoor Adventurers who have recently taken a Canadian trip.

2.2 Soft Outdoor Adventure Enthusiasts: Demographic Characteristics

Soft Outdoor Adventure Enthusiasts are concentrated at the younger end of the adult age spectrum. Over half of them are between 18 and 44 years, with about equal proportions falling into the 18 to 34 year age group and the 35 to 44 year age group. Conversely, they are substantively under-represented at the older end of the age spectrum. Fewer than 1-in-10 are 65 years of age or over (8%) whereas close to 2-in-10 recent American leisure travellers to Canada as a whole fall into this older age group (17%).

The majority of Soft Outdoor Adventure Enthusiasts live in adult-only households (65%). Because of their relative youth, these outdoor-oriented tourists are, however, more likely than the "typical" American tourist to Canada to have children under 12 years of age in their households.

Soft Outdoor Adventure Enthusiasts are also more affluent than is the "typical" American traveller to Canada with an average household income of $71,000 (US$) compared to $65,200 (US$) for the typical American leisure visitor to Canada (1998 US dollars). Higher household incomes are consistent with higher levels of formal education: over one-third of Soft Outdoor Adventure Enthusiasts have at least one university degree (35%) and a further 45 per cent have had some post-secondary education.

2.3 Outdoor Activities among Soft Outdoor Adventure Enthusiasts

By definition, Soft Outdoor Adventure Enthusiasts participate in multiple outdoor activities while on trips. They may have engaged in these activities while on a recent trip to Canada or on trips to other destinations, worldwide. The most popular outdoor activities – sought by between one-half and one-third of these tourists while on a trip in the past couple of years – tend to be warm weather encounters with nature.

Activities Engaged in by 30 per cent to 50 per cent of Soft Outdoor Adventure Enthusiasts

- Wildlife viewing (53%)
- Hiking/backpacking in wilderness settings (47%)
- Fishing (44%)
- Wildflowers / flora viewing (40%)
- Motor boating (39%)
- Kayaking or canoeing (38%)
- Cycling (37%)
- Downhill skiing (33%)
- Golfing (32%)
- Horseback riding (31%)

Appreciation of Canada's natural beauty is consistent with the types of activities participated in by Soft Outdoor Adventure Enthusiasts. Not only do these tourists rate Canada very highly as a *place with beautiful scenery* (9.2 on a ten point scale) but they also have a penchant for activities that would allow them to experience this scenery first hand: viewing wildlife and flora as they hike through wilderness settings or kayak and canoe on lakes and waterways.

The strong participation in motor boating reflects the popularity of fishing within this segment. Over four-in-ten Soft Outdoor Adventure Enthusiasts fish in fresh or salt water on their trips (44%) and about the same proportion (39%) go motor boating. These enthusiasts are also quite positive in their perceptions of Canada as a *great place to go fishing* (8.7 on a ten point scale).

Alpine skiing may also lure Soft Outdoor Adventure Enthusiasts from the U.S.A. to Canada in the winter months, countering their strong tendency to engage in summer outdoor activities. To attract them, Canada's image as a *winter destination* may have to be improved among these outdoor-oriented tourists (6.5 on a ten point scale).

Other outdoor activities that attract between 10 per cent and 25 per cent of Soft Outdoor Adventure Enthusiasts include whale or bird watching, sailing, cross-country skiing, rafting, hunting and motorcycling.

Activities engaged in by 10 per cent to 25 per cent of Soft Outdoor Adventure Enthusiasts

- Whale watching (25%)
- Bird watching (22%)
- Sailing (18%)
- Cross-county skiing (17%)
- White water rafting (15%)
- Hunting (13%)
- Motorcycling (10%)

Niche outdoor activities such as hot air ballooning, scuba diving, ice fishing, wind surfing, ice or rock climbing have appeal to comparatively few Soft Outdoor Adventure Enthusiasts who travel in Canada.

2.4 Overlap With Other Activity-Based Segments

Soft Outdoor Adventure Enthusiasts with recent Canadian leisure travel experiences have relatively wide-ranging tourism interests. Two-fifths of these Americans are also Heritage Enthusiasts, about one-third are also Visual Arts Enthusiasts and about one-quarter are Wine/Culinary Enthusiasts.

These overlaps with other market segments of special interest to the CTC provide packaging, product development and marketing opportunities: they suggest that sub-groups within the Soft Outdoor Adventure Enthusiast segment might be attracted by *combinations* of products that meet their 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 Soft Outdoor Adventure Enthusiasts for attributes that support an *outdoors* image. These include the following:

- A place with beautiful scenery;
- A place that is very clean and well cared for;
- A great place to go for fishing;
- A great place to relax and get away from it all;
- A place with lots of things for mature adults to see and do;
- A place with lots of things for families to see and do.

This market segment also considers Canada to be a place that respects the natural environment, is safe for visitors, has friendly people, is one of the best destinations for outdoor activities, has a lot for young people to see and do and is among the best destinations to visit in the summer.

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

The similarity of ratings within the outdoors market segment and the "typical" American visitor to Canada poses a challenge for those who wish to target this segment. Elevating perceptions among Soft Outdoor Adventure Enthusiasts that Canada is *one of the best places for outdoor activities* and a *great place to experience adventure and excitement* as well as increasing Canada's image as a place that offers *value for money, winter* opportunities and *respect for the natural environment* may be required in order to entice more Soft Outdoor Adventure Enthusiasts to come to Canada for the expressed purpose of engaging in outdoor activities.

Image building and product awareness messages to Soft 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 Soft Outdoor Adventure Enthusiasts 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 Soft Outdoor Adventure Enthusiasts

There will be an increase in the absolute number of Americans who will be in the market for soft outdoor adventure activities between 2000 and 2025, from an estimated 35.5 million now to about 42.6 million in 2025. Canada's likely share of this market – those who will seek soft outdoor adventure and take leisure trips to Canada – is also expected to grow, from 7.1 million to 8.8 million.

These growth rates are *lower* than the population growth rate of the U.S.A. as a whole, primarily because soft outdoor adventure activities tend to appeal to 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 soft outdoor adventure – 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

The Soft Outdoors Adventure Enthusiast market for Canada from the U.S.A. is characterized by its relative youth, affluence and post-secondary education. It is highly concentrated in border states and particularly prone to visit Ontario and British Columbia. Outdoor activities with the greatest appeal to these tourists are those that are pursued during the *warm weather months* -- wildlife and flora viewing, hiking and backpacking, fishing, canoeing or kayaking and cycling.

Of the market segments of special interest to the CTC, Soft Outdoors Adventure Enthusiasts currently represent the largest pool of potential visitors from the United States – over 35.5 million adult Americans. Of this sizeable pool, Canada currently attracts about one-fifth (7.1 million), leaving ample opportunity for growth.

Despite the size of the potential market in the U.S.A., retention of the Soft Outdoor Adventure Enthusiast segment will become increasingly difficult as the U.S. population ages and migrates further away from the Canada/U.S. border.

As traditional markets in border states decline relative to Tier III states, Canada may have to develop a multi-pronged strategy to retain and/or grow the Soft Outdoor Adventure Enthusiast segment:

- Provide outdoor product with varying levels of physical exertion so that nature-based tourism businesses can continue to attract the energetic, action-oriented youth and family markets but can also attract the increasing number of older Americans who may retain their interest in the outdoors but will require gentler outdoor experiences;
- Package outdoor product with less strenuous and/or indoor activities that have considerable appeal to Soft Outdoor Adventure Enthusiasts -- heritage, arts and/or wine/culinary experiences;
- Learn more about how Canada can meet the specific outdoor interests of growth areas in the United States: the *long haul* markets in Tier III states.

3. U.S. Soft 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 and Culinary Enthusiasts, Alpine Skiers, Other Winter 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 Soft Outdoor Adventure Enthusiast segment.

Of the 200.4 million American adults in 2000, about 35.5 million are Soft Outdoor Adventure Enthusiasts (18%). Of these, about 2-in-10 claim to have visited Canada on a leisure trip in the past two years. Thus, the market for Canada's soft outdoor adventure products is in the range of seven million American adults (7.069 million).

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

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Soft Outdoor Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*7.1 million*
Soft Outdoor Adventure	**35.5**	**7.1**	**7.1**
Hard Outdoor Adventure	15.7	3.2	N/A
Wine/Culinary	21.6	5.5	1.9
Heritage	34.5	8.3	2.9
Performing Arts	15.6	3.8	1.3
Visual Arts	27.6	7.0	2.3
Winter Outdoors (excluding alpine skiing)	15.0	3.7	2.2
Alpine Skiing	21.4	4.6	2.5

Source: Special TAMS Tabulations, page 7-1. See Appendix for unweighted base sizes.
Note: By definition, "soft outdoor adventure enthusiasts" are NOT "hard outdoor adventure enthusiasts".

Of the activity-based market segments of special interest to the CTC, Soft Outdoor Adventure Enthusiasts represent the largest share of the total USA population (35.5 million adults), followed closely by Heritage Enthusiasts (34.5 million), and at a greater distance, by Visual Arts Enthusiasts (27.6 million). Within the sub-group of Americans who have recent travel experience in Canada, the 7.1 million Soft Outdoor Adventure Enthusiasts are about on par with Visual Arts Enthusiasts

(7.0 million) but represent fewer American tourists than are found in the Heritage Enthusiast market (8.3 million).

Soft Outdoor Adventure Enthusiasts with recent Canadian leisure travel experiences have relatively wide-ranging tourism interests. Two-fifths of these Americans are also Heritage Enthusiasts, about one-third are Visual Arts Enthusiasts and about one-quarter are Wine/Culinary Enthusiasts. These overlaps suggest packaging, product development and marketing opportunities: sub-groups within the Soft Outdoor Adventure Enthusiast segment might be attracted by *combinations* of products that meet their outdoor adventure interests as well as their interests in museums, galleries, Aboriginal events, theatre, other live performances, and food and wine experiences.

Since the Soft Outdoor Adventure Enthusiast segment includes Americans who may ski or engage in other winter sports, it is not surprising to find that about one-third of them fall into the Alpine Ski and Other Winter Outdoor market segments. This finding suggests that a substantial sub-set of the Soft Outdoor Adventure Enthusiast segment might be amenable to winter travel to Canada.

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 33 per cent, or 2.3 million of Soft 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 Soft Outdoor Adventure Enthusiasts represent one-third of the total market, suggesting that the Soft Outdoor Adventure market draws particularly heavily on *near* markets but is less successful in attracting Americans living considerable distances from the U.S./Canada border.

Table 2: Geographic Distribution of U.S.A. Soft Outdoor Adventure Enthusiasts

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Soft Outdoor Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*7.1 million*
Tier I (Border States)	18%	33%	33%
Tier II	28%	32%	33%
Tier III	54%	35%	35%

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

Regions that have noticeably higher proportions of Soft Outdoor Adventure Enthusiasts with Canadian experience than would be expected in light of the U.S. population distribution as a whole include East North Central and Mid Atlantic. For more regional information, please refer to Summary Table A-2, appended.

American Soft 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 (34%) and Quebec (22%).

Smaller proportions visit Atlantic Canada (9%) and the Prairie provinces – Alberta (9%) and Manitoba/Saskatchewan (6%).

Exceptions to the "typical" destination pattern for Americans who come to Canada on leisure trips are evident in the two coastal regions.

- Possibly as a function of its diverse outdoor product including coastal and mountain regions and its long-term marketing effort to position itself as a *super natural* destination, **British Columbia** attracts a disproportionately high share of U.S. Soft Outdoor Adventure Enthusiasts (34%) relative to "typical" American leisure visitors as a whole (30%).
- Soft Outdoor Adventure Enthusiasts are somewhat less likely to select a destination in **Atlantic Canada** (9%) than are Americans who have recent Canadian travel experience (12%).

There is a robust competitive environment for Canada within the Soft Outdoor Adventure Enthusiast segment. These tourists 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 (27%), Europe (18%) and other countries (16%).

Table 3: U.S.A. Soft Outdoor Adventure Enthusiasts – Destinations Visited in Past 2 years

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Soft Outdoor Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*7.1 million*
Canadian Destinations	**13%**	**100%**	**100%**
Atlantic Canada	2%	12%	9%
Quebec	3%	25%	22%
Ontario	7%	55%	56%
Manitoba/Saskatchewan	1%	7%	6%
Alberta	1%	10%	9%
British Columbia	4%	30%	34%
Territories	1%	4%	4%
Other Destinations			
Any U.S.A. Destination	69%	93%	95%
Mexico/Caribbean	15%	25%	27%
U.K./Other Europe	8%	18%	18%
Other Countries	7%	15%	16%
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 Soft Outdoor Adventure Enthusiasts

Soft Outdoor Adventure Enthusiasts are slightly more likely to be men than women and are concentrated at the younger end of the adult age spectrum. Over half of them are between 18 and 44 years, with about equal proportions falling into the 18 to 34 year age group and the 35 to 44 year age group.

Table 4: Demographics of U.S.A. Soft Outdoor Adventure Enthusiasts – Gender & Age

	Recent Leisure Travellers to Canada	
	Total	Soft Outdoor Enthusiasts
Adults 18+	*26.3 million*	*7.1 million*
Men	51%	53%
Women	49%	47%
18 - 34 years	24%	25%
35 - 44 years	20%	28%
45 - 54 years	20%	21%
55 - 64 years	14%	14%
65+ years	17%	8%
Average Age	47.3 years	44.1 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, Soft Outdoor Adventure Enthusiasts are substantively under-represented among older Americans. Half as many Soft Outdoor Adventure Enthusiasts are at least 65 years of age (8%) as is the case among recent leisure travellers to Canada as a whole (17%).

Table 5: Demographics of U.S.A. Soft Outdoor Adventure Enthusiasts – Income & Education

	Recent Leisure Travellers to Canada	
	Total	Soft Outdoor Enthusiasts
Adults 18+	*26.3 million*	*7.1 million*
Household Income		
Under $40,000	26%	21%
$40,000 - $59,999	24%	21%
$60,000 - $99,999	31%	37%
$100,000 or more	19%	22%
Average	$65,200 US	$71,000 US
Education		
Some Secondary or Less	6%	5%
Completed Secondary	19%	14%
Some Post Secondary	45%	45%
Graduated University	30%	35%

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

Soft Outdoor Adventure Enthusiasts span the income and education spectrums, with about one-fifth falling into a relatively low income group (under $40,000 US), possibly because of the over-representation of younger people in this market segment; the same proportion claiming to have household incomes in the $40,000 to $60,000 range; and over-one third between $60,000 to $100,000. Incomes in excess of $100,000 are characteristic of over one-fifth of these outdoor enthusiasts (22%). This income pattern, while similar to all recent leisure travellers from the U.S.A., suggests that Soft Outdoor Adventure Enthusiasts are somewhat more affluent than is the "typical" American traveller to Canada: the average household income for the typical American leisure visitor to Canada is $65,200 and the average for the sub-group with a particular interest in Canada's outdoors is $71,000.

Higher household incomes are consistent with higher levels of formal education: over one-third of Soft Outdoor Adventure Enthusiasts have at least one university degree (35%) and a further 45 per cent have had some post-secondary education.

Most Soft Outdoor Adventure Enthusiasts live in adult-only households – those with no members under the age of eighteen. Only 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 (35%). While adult-only households predominate among Soft Outdoor Adventure Enthusiasts (65%), these Americans are more likely to live in households with children under twelve years of age (28%) than is the typical leisure tourist to Canada from the U.S.A. (22%).

Table 6: Demographics of U.S.A. Soft Outdoor Adventure Enthusiasts – Household Composition

	Recent Leisure Travellers to Canada	
	Total	Soft Outdoor Enthusiasts
Adults 18+	*26.3 million*	*7.1 million*
Adult Only	71%	65%
Any Teens/Children	29%	35%
Any Children under 12	22%	28%

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

3.4 Travel Activities Among Soft Outdoor Adventure Enthusiasts

3.4.1 Outdoor Activities

Of the activities used to define Soft Outdoor Adventure Enthusiasts, hiking and backpacking has the largest following. Close to 5-in-10 of these enthusiasts claim to have participated in this activity on a leisure trip in the past couple of years. It is important to note that even though these Soft Outdoor Adventure Enthusiasts travelled to Canada during the past several years, the survey findings do not provide an indication of whether their hiking/backpacking experience or any other activity discussed in this report took place on a *Canadian* trip.

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

	SOFT OUTDOOR ENTHUSIASTS
Adults 18+	*7.1 million*
Hiking/backpacking in wilderness settings	47%
Motor boating	39%
Kayaking or canoeing	38%
Cycling	37%
Downhill skiing	33%
Horseback riding	31%
Sailing	18%
Cross-county skiing	17%
Snowmobiling	12%
Motorcycling	10%
Snowboarding	7%
Hot air ballooning	5%
Wind surfing	2%

Source: Special TAMS Tabulations, page 8.

Other popular *defining* activities include motor boating, kayaking or canoeing – likely related to the popularity of fishing among Soft Outdoor Adventure Enthusiasts (see following section). Close to 2-in-5 engage in these water-based activities while on trips. Cycling, alpine skiing and horseback riding are also comparatively widespread among Soft Outdoor Adventure Enthusiasts, capturing at least 3-in-10 participants on recent leisure trips.

Sailing and cross-country skiing attracted fewer than 2-in-10 Soft Outdoor Adventure Enthusiasts on trips in recent years while snowmobiling and motorcycling attracted about 1-in-10. Other defining activities for the market segment, including snowboarding, hot air ballooning and wind surfing are best described as *niche* activities within the segment.

3.4.2 Other Outdoor Activities

While on trips, over half of Soft Outdoor Adventure Enthusiasts view wildlife and about two-fifths observe wild flora and/or go fishing, especially in fresh water. About one-third golf while on their holidays with most playing the occasional game (30%) rather than staying at a golf resort (13%) or taking a golfing tour to play on various courses (9%). Between one-quarter and one-fifth go whale watching and/or bird watching. This wide array of popular outdoor activities on recent trips makes these American tourists excellent targets for many of Canada's regions and product offerings.

Table 8: U.S.A. Soft Outdoor Adventure Enthusiasts – Other Outdoor Activities

	SOFT OUTDOOR ENTHUSIASTS
Adults 18+	*7.1 million*
Wildlife viewing	53%
Fishing – any (NET)	44%
Fishing – fresh water	38%
Fishing – salt water	19%
Ice fishing	4%
Wildflowers / flora viewing	40%
Golfing – any (NET)	32%
Golfing – occasional game while on a trip	30%
Golfing – golf resort for one or more nights	13%
Golfing – packaged golf tour to play on various courses	9%
Whale watching	25%
Bird watching	22%
White water rafting	15%
Hunting – any (NET)	13%
Hunting – big game	11%
Hunting – birds or small game	9%
Scuba diving	5%
Ice climbing	2%
Rock climbing	2%
Bungee jumping	1%
Dog sledding	*
Parachuting	*

*Source: Special TAMS Tabulations, pages 8-1/3. *Less than 0.5 per cent.*

Niche activity markets that might attract the Soft Outdoor Adventure Enthusiast include hunting for big and small game, scuba diving, and, at a much more limited level, ice and/or rock climbing.

3.4.3 Heritage Activities

As noted earlier, there is considerable overlap between the 7.1 million Soft Outdoor Adventure Enthusiasts and the group of American travellers who are defined as Heritage Enthusiasts. The heritage experiences that might prove most attractive to Soft Outdoor Adventure Enthusiasts include general history museums, local festivals and fairs as well as farmers' fairs or markets. These heritage experiences have attracted close to half of the Soft Outdoor Adventure Enthusiast segment while on a trip in the past couple of years.

Table 9: U.S.A. Soft Outdoor Adventure Enthusiasts – Heritage Activities

	SOFT OUTDOOR ENTHUSIASTS
Adults 18+	*7.1 million*
General history museums	51%
Local festivals or fairs	50%
Farmers' fairs or markets	46%
Science & tech museums	40%
Historic sites	40%
Historical replicas of cities/towns	31%
Pow Wow/other Aboriginal celebrations/attractions	25%
Pick your own farms / harvesting	22%
Children's museums	20%
French Canadian cultural experiences	13%
Western theme events	12%
Carnivals such as Caribana/ Mardi Gras or Rio's Carnival	7%

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

Other heritage attractions widely sought by Soft Outdoor Adventure Enthusiasts while on their travels include science and technology museums and historic sites. There is also comparatively robust interest in Aboriginal celebrations, attractions and events among the soft outdoor segment. Since many of Canada's Aboriginal tourism experiences take place in natural settings, there is likely to be considerable synergy between the outdoor segment's interest in canoeing, kayaking, fishing, hiking and backpacking and Aboriginal cultural experiences.

3.4.4 Performing & Visual Arts Activities

With the exception of live theatre performances (40%), there is not a great deal of overlap between Soft Outdoor Adventure Enthusiasts and activities that characterize Performing Arts Enthusiasts when they travel.

Table 10: U.S.A. Soft Outdoor Adventure Enthusiasts – Performing & Visual Arts Activities

	SOFT OUTDOOR ENTHUSIASTS
Adults 18+	*7.1 million*
Performing Arts	
Theatre	40%
Ballet or other dance	19%
Classical music concerts	18%
Music festivals	15%
Jazz music concerts	15%
Theatre festivals	12%
Opera	12%
Musical attractions such as Jazzland	10%
Literary festivals	7%
Visual Arts	
Local arts & crafts studios	63%
Art galleries	47%
International film festivals	4%

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

Conversely, shopping or browsing in local arts and crafts studios (63%) and, to a lesser extent, going to art galleries (47%) are fairly widely sought by Soft Outdoor Adventure Enthusiasts while on their trips. These activities that characterize the Visual Arts Enthusiast segment might be paired with soft outdoor experiences to help attract the outdoors 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 and aquariums on their travels. Thus, it is not surprising that over half of those who have visited Canada in the past couple of years and are Soft Outdoor Adventure Enthusiasts claim to have sought these attractions while on trips in the recent past.

Table 11: U.S.A. Soft Outdoor Adventure Enthusiasts – Other Activities

	Soft Outdoor Enthusiasts
Adults 18+	*7.1 million*
Zoos	56%
Aquariums	51%
Casinos	41%
Botanical gardens	39%
Planetariums	19%
Auto races	15%
Horse races	13%

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

Botanical gardens and casinos are also relatively common travel experiences among Soft Outdoor Adventure Enthusiasts, with 2-in-5 claiming to have been to these types of attractions on trips over the past two years or so.

3.5 Ratings of Canada

Soft Outdoor Adventure Enthusiasts 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 Soft Outdoor Adventure Enthusiast segment who refrain from offering an opinion.

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

- A place with beautiful scenery
- A place that is very clean and well cared for
- A great place to go for fishing
- A great place to relax and get away from it all
- A place with lots of things for mature adults to see and do
- A place with lots of things for families to see and do

This market segment also considers Canada to be a place that respects the natural environment, is safe for visitors, has friendly people, is one of the best destinations for outdoor activities, has a lot for young people to see and do and is among the best destinations to visit in the summer.

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

One might have expected the outdoor-oriented characteristics to be more enthusiastically rated by those who seek outdoor adventure activities than by the "typical" American visitor to Canada but Soft Outdoor Adventure Enthusiasts have impressions of Canada that are virtually identical to *all* Americans with recent travel experience in Canada.

The similarity of ratings within the outdoors market segment and the "typical" visitor poses a challenge for those who wish to target this segment. Elevating perceptions among Soft Outdoor Adventure Enthusiasts that Canada is *one of the best places for outdoor activities* and a *great place to experience adventure and excitement* as well as increasing Canada's image as a place that offers *value for money*, *winter* opportunities and *respect for the natural environment* may be required in order to entice more Soft Outdoor Adventure Enthusiasts to come to Canada for the expressed purpose of engaging in outdoor activities.

Table 12: U.S.A. Soft Outdoor Adventure Enthusiasts – Attitudes Toward Canada

	Recent Leisure Travellers to Canada		
	Total	Soft Outdoor Enthusiasts	
Adults 18+	*26.3 million*	*7.1 million*	
	Average #	Average #	Can't Rate %
Beautiful scenery	9.2	9.2	4%
Clean/well cared for	8.7	8.7	4%
Great place for fishing	8.7	8.7	35%
Great place to relax	8.6	8.6	7%
Lots for mature adults	8.6	8.6	11%
Lots for families	8.5	8.5	12%
Respects natural environment	8.5	8.4	9%
Safe for visitors	8.3	8.3	10%
Place with friendly people	8.4	8.3	5%
Great place for hunting	8.4	8.3	51%
One of best destinations for outdoor activities	8.2	8.2	16%
Lots for young adults	8.1	8.2	21%
One of best summer destinations	8.1	8.0	10%
Great place to experience adventure & excitement	8.0	8.0	13%
Place with interesting shops	8.0	7.9	13%
Offers excellent value for money	7.9	7.9	9%
Many cultural events & attractions	7.8	7.7	15%
Great place to experience city life	7.7	7.5	15%
Great place to experience different cultures	7.6	7.4	16%
Great place to see historic sites	7.5	7.3	14%
Great place for Aboriginal culture	7.4	7.3	36%
Place for romance	7.2	7.1	23%
Great place to experience "good life"	7.1	6.9	27%
One of best winter destinations	6.3	6.5	19%
Popular, trendy place	6.6	6.5	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 Soft Outdoor Adventure Enthusiasts

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

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

Americans in the Soft Outdoor Adventure Enthusiast 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 two-thirds claim to read or look through the travel section of the weekend editions of a local newspaper.

Table 13: U.S.A. Soft Outdoor Adventure Enthusiasts – Print Media Read Regularly

	SOFT OUTDOOR ENTHUSIASTS
Adults 18+	*7.1 million*
Daily Newspaper (Any)	**89%**
Weekday edition	76%
Travel section of weekday edition	50%
Weekend edition	81%
Travel section of weekend edition	63%
Community newspapers	75%
Any Magazines	**94%**
Travel magazines	42%
National Geographic	34%
Sports magazines	33%
Hobby magazines	42%
News magazines	47%
Fashion/homemaking magazines	28%
General interest/city life magazines	20%

Source: Special TAMS Tabulations, page 14.

They may be avid magazine readers (94%), but only about 4-in-10 read travel magazines on a regular basis. At the same time, one-third say that they read National Geographic regularly.

Daily and weekend newspapers may have better reach among Soft 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. Professional sports broadcasts are also particularly popular within this market segment (62%), followed by early evening news broadcasts (59%), evening sitcoms (55%), dramas (51%) and late evening news (50%).

Table 14: U.S.A. Soft Outdoor Adventure Enthusiasts – Television Programs Viewed Regularly

	SOFT OUTDOOR ENTHUSIASTS
Adults 18+	*7.1 million*
Movies	70%
Nature shows	65%
Professional sports	62%
Early evening news	59%
Evening sitcoms	55%
Evening drama	51%
Late evening news	50%
Instructional/hobby shows	43%
Morning news	40%
Daytime programs on weekdays	16%

Source: Special TAMS Tabulations, page 16.

Overlap with the heritage and visual arts segments is manifest in the comparatively robust level of membership in art galleries and museums among Soft Outdoor Adventure Enthusiasts (23%). Membership lists from these types of attractions in the U.S.A. may be ways to reach Soft Outdoor Adventure Enthusiasts in the market for tourism experiences that blend outdoors and culture.

In light of the fact that at least one-third of Soft Outdoor Adventure Enthusiasts live in border states and would likely drive to Canada, the high level of auto club membership (e.g., AAA) among them makes this type of organization an opportune way to reach these enthusiasts.

Table 15: U.S.A. Soft Outdoor Adventure Enthusiasts – Club/Organization Memberships

	SOFT OUTDOOR ENTHUSIASTS
Adults 18+	*7.1 million*
Auto club	50%
Sports club	37%
Nature organization	16%
Art gallery/museum	23%
Zoo/botanical garden	16%
Gardening club	3%

Source: Special TAMS Tabulations, page 17.

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 Soft Outdoor Adventure Enthusiast 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 . . .		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.

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 . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
	2000	2025		
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 2000 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 Soft Outdoor Adventure Enthusiasts

As noted in the demographic profile section of this report, the Soft Outdoor Adventure Enthusiast market segment tends to attract comparatively young travellers and those with 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 Soft Outdoor Adventure Enthusiasts help explain why growth in this market is predicted to be 25 per cent **lower** than would have been expected given today's population structure. The total Soft Outdoor Adventure Enthusiast market in the U.S.A. is predicted to grow from 35.5 million in 2000 to 42.6 million by 2025.

A similar pattern is evident for changes in the Soft Outdoor Adventure Enthusiast segment that takes leisure trips to Canada. This population is expected to increase from 7.1 million now to 8.8 million in 2025. This growth rate, at 25 per cent, is about 7 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 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%	
Total Soft Outdoor Adventure Enthusiasts	35.5	42.6	20%	-25%
Soft Outdoor Adventure Enthusiasts Who Take Leisure Trips to Canada	**7.1**	**8.8**	**25%**	**-7%**
Other CTC Activity Groups - Leisure Trips in Canada				
Alpine Skiing	4.6	5.7	25%	-8%
Other Winter Outdoors	3.7	4.7	26%	-2%
Hard Outdoor Adventure Enthusiasts	3.2	3.8	20%	-25%
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 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 predefined 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. Soft Outdoor Adventure Enthusiasts – Census Regions

	USA Adults	Recent Travellers to Canada	
	Total 200.4 million	Total 26.3 million	Soft Outdoor Enthusiasts 7.1 million
New England	5%	8%	4%
Mid Atlantic	14%	19%	18%
South Atlantic	18%	12%	15%
East North Central	16%	23%	23%
West North Central	7%	5%	8%
East South Central	6%	3%	3%
West South Central	11%	5%	4%
Mountain	6%	6%	9%
Pacific	15%	18%	17%

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