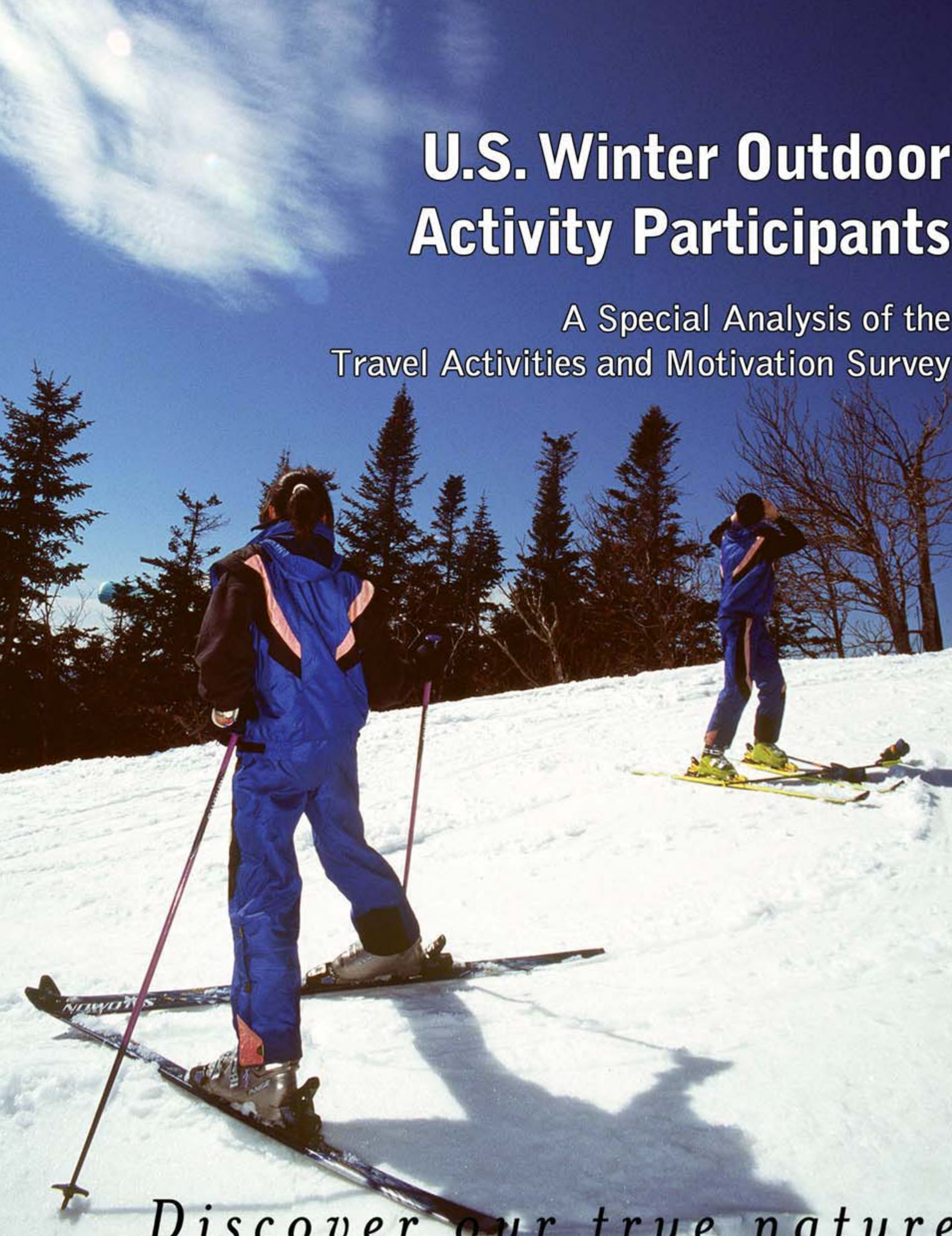
U.S. Winter Outdoor Activity Participants

A Special Analysis of the Travel Activities and Motivation Survey



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Canada

U.S. Winter Outdoor Activity Participants

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 **Winter Outdoor Activity Participants** – Americans who have taken leisure trips to Canada and engage in winter outdoor activities 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.

- ice climbing
- dog sledding
- ice fishing
- snowmobiling
- cross-county skiing

Winter outdoor sports participants may also have engaged in downhill skiing or snowboarding while on their travels, but the alpine winter 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 Winter Outdoor Activity Participants 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 Winter Outdoor Activity Participant 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, Soft Outdoor and Hard Outdoor Adventure Enthusiasts, and Alpine Ski Tourists.

The reader is advised that the term *Winter Outdoors* is used throughout this report to describe the group of American travellers who engage in one or more winter outdoor activities apart from alpine skiing. As noted above, these individuals may also be skiers, but alpine skiing and snowboarding are not used to *define* the market segment.

2. Executive Summary

2.1 Winter Outdoor Activity Participants: Market Size

Of the 200.4 million American adults in 2000, about 15.0 million are Winter Outdoor Activity Participants (8%). Of these, about one-quarter claim to have visited Canada on a leisure trip in the past two years. Thus, the market for Canada's winter outdoor products apart from alpine skiing is in the range of 3.7 million American adults.

Many Winter Outdoor Activity Participants 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 Winter Outdoor Activity Participants represent twice this proportion, or two-fifths of the total market (41%).

The winter outdoors market is at close to parity for mid-tier states but Canada is comparatively unsuccessful in attracting Americans in this market segment who live considerable distances from the U.S./Canada border. Tier III states represent more than half of the U.S. adult population (54%) but fewer than one-third of the members of this winter outdoor group (30%).

The comparative strength of the market in the northern tiers of the U.S.A. relative to the southern tier likely reflects the fact that Americans who grow up with a winter that offers cold weather activities such as ice fishing, snowmobiling and cross-country skiing are more apt to engage in these sports than those who grow up in more moderate climate zones. Thus, these winter outdoor activities are likely to be *typical* of their winter activities for many Tier I Americans, whereas they are more apt to be *exotic* for their more southern neighbours. It may also be the case that northern state residents in the U.S.A. are more likely to own the equipment required to snowmobile and cross country ski than are Tier III Americans.

American Winter Outdoor Activity Participants 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 (62%), followed by British Columbia (26%) and Quebec (26%). Smaller proportions visit Atlantic Canada (11%) and the Prairie provinces – Alberta (6%) and Manitoba/Saskatchewan (8%). Ontario is the primary exception to the "typical" destination pattern for Americans. This province attracts 55 per cent of all American tourists over a two year period, but attracts 62 per cent of these winter enthusiasts.

There is a robust competitive environment for Canada within the Winter Outdoor Activity Participant 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 (23%), Europe (23%) and, less commonly, to other countries (10%).

2.2 Winter Outdoor Activity Participants: Demographic Characteristics

Winter Outdoor Activity Participants 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 a higher proportion falling into the 35 to 44 year age group (31%) than in the 18 to 34 year age group (26%).

Most Winter Outdoor Activity Participants live in adult-only households – those with no members under the age of eighteen (59%), although two-fifths are likely to be in the market for winter outdoor tourism experiences that take into account the interests and needs of teenagers or children (41%).

Winter Outdoor Activity Participants are also more affluent than is the "typical" American leisure traveller to Canada with an average household income of $72,400 (US$) compared to $65,200 (US$) for the typical visitor (1998 US dollars). Higher household incomes are consistent with higher levels of formal education: one-third of Winter Outdoor Activity Participants have at least one university degree (33%) and a further 46 per cent have had some other form of post-secondary education.

2.3 Outdoor Activities among Winter Outdoor Activity Participants

By definition, Winter Outdoor Activity Participants participate in at least one outdoor winter activity apart from downhill skiing 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 cross-country skiing, followed by snowmobiling and, at a considerable distance, by ice fishing.

Winter Outdoor Activities Engaged in on Trips in the Past 2 Years

- Cross country skiing (52%)
- Snowmobiling (40%)
- Ice fishing (19%)
- Ice climbing (7%)
- Dog sledding (5%)

Even though it is not used to define the Winter Outdoor Activity Participant segment, downhill skiing constitutes a trip activity for almost 2-in-5 of these Americans and snowboarding attracts about 1-in-14.

While on trips, over half of American Winter Outdoor Activity Participants view wildlife and/or hike or backpack in wilderness settings and slightly fewer go fishing in fresh water while on trips. About two-fifths view wildflowers and other flora, cycle, go kayaking or canoeing, and/or golf while on their holidays. One-third also go motor boating, and one-quarter might be found watching whales or birds. This wide array of popular outdoor activities on recent trips is suggestive of a market segment that enjoys the outdoors during *all seasons*.

At least half of winter outdoor enthusiasts went to zoos, local festivals or fairs, and museums on recent trips and somewhat fewer have been to aquariums, art galleries, live theatre performances, botanical gardens, and/or casinos on their trips. Since these attractions tend to be *indoors*, they may provide welcome relief from the cold to Canadians on trips in which they spend time engaging in winter outdoor experiences.

2.4 Overlap With Other Activity-Based Segments

Over half of Winter Outdoor Activity Participants with recent Canadian leisure travel experiences are also Soft Outdoor Adventure Enthusiasts (59%), almost half are Heritage Tourism Enthusiasts (46%), about one-third are Visual Arts Enthusiasts (35%) and slightly fewer are Wine/Culinary Enthusiasts (32%).

These overlaps suggest packaging, product development and marketing opportunities: sub-groups within the Winter Outdoor Activity Participants 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.

2.5 Image Challenges & Media Sources

Canada is most highly rated by Winter Outdoor Activity Participants for attributes that support an *outdoors* image:

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

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, is one of the best destinations for outdoor activities, is safe for visitors, has friendly people, 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 Winter Outdoor Activity Participants are least positive about Canada as a place to visit in the winter, as a place to experience the "good life" and as a destination with a popular or trendy image.

In light of their tourism interests, it would be expected that winter 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 (6.8 on a ten point scale) than do American travellers to Canada as a whole (6.3 on a ten point scale). Nonetheless, Winter Outdoor Activity Participants rate Canada significantly better as a summer destination (7.8 on a ten point scale) than as a place to go in the winter.

Image building and product awareness messages to Winter Outdoor Activity Participants 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 Winter Outdoor Activity Participants among those measured in the survey.

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

Over one-quarter of these winter enthusiasts say that they attend sportsmen's shows and/or boat shows on a regular basis and slightly fewer claim to go to RV/camper shows regularly. These venues may prove to be important marketing channels to get information about Canada's winter outdoors products to American Winter Outdoor Activity Participants.

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 Winter Outdoor Activity Participants

There will be an increase in the absolute number of Americans who will be in the market for winter outdoor activities between 2000 and 2025, from an estimated 15.0 million now to about 16.6 million in 2025. Canada's likely share of this market – those who will seek outdoor winter experiences and take leisure trips to Canada – is also expected to grow, from 3.7 million to 4.7 million.

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

The southern shift in the distribution of the U.S. population will also require increased efforts to attract winter outdoor enthusiasts from farther a field than states on or near the Canada/ U.S.A. border.

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 Winter Outdoor Activity Participant market for Canada from the U.S.A. is characterized by its youth, affluence and post-secondary education. There are also more men than women in this market segment.

The market is highly concentrated in border states and particularly prone to visit Ontario. Winter outdoor activities with the greatest appeal to these tourists are cross country skiing and snowmobiling, with only lukewarm enthusiasm for ice fishing.

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.

Of the market segments of special interest to the CTC, Winter Outdoor Activity Participants currently represent the smallest pool of potential visitors from the United States – almost 15.0 million adult Americans. Of this pool, Canada currently attracts about one-quarter (3.7 million), leaving ample opportunity for growth.

Despite the size of the potential market in the U.S.A., retention of the winter market 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 winter outdoors segment:

- Provide winter 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 winter outdoor experiences;
- Package winter outdoor product with less strenuous and/or indoor activities that have considerable appeal to Winter Outdoor Activity Participants -- heritage, arts and/or wine/culinary experiences;
- Learn more about how Canada can meet the specific winter outdoor interests of growth areas in the United States: the *long haul* markets in Tier III states. *Nostalgia* for winter might act as a hook to interest Americans who have migrated to southern states from northern ones. For those raised in the southern states, however, appeal to the *exotic* nature of winter outdoor experiences in Canada may be more appropriate.

Promotion of Canada's winter outdoor 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 snowmobiling, ice fishing, dog sledding and cross country skiing may become an increasing challenge for the most accessible tourism regions of Canada.

3. U.S. Winter Outdoor Activity Participants – 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 Outdoor Activity Participants (non-alpine), Heritage Enthusiasts, Visual Arts Enthusiasts, and Performing Arts Enthusiasts (see Appendix for definitions). The table below provides information on the total size of each of these market segments, the number who have travelled to a Canadian destination in the past couple of years and the degree of overlap within the Winter Outdoor Activity Participant segment.

Of the 200.4 million American adults in 2000, about 15.0 million are Winter Outdoor Activity Participants (8%). Of these, about one-quarter claim to have visited Canada on a leisure trip in the past two years. Thus, the market for Canada's winter outdoor products apart from alpine skiing is in the range of 3.7 million American adults.

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

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Winter Outdoors
Adults 18+	*200.4 million*	*26.3 million*	*3.7 million*
Winter Outdoors	**15.0**	**3.7**	**3.7**
Soft Outdoor Adventure	35.5	7.1	2.2
Hard Outdoor Adventure	15.7	3.2	1.1
Wine/Culinary	21.6	5.5	1.2
Heritage	34.5	8.3	1.7
Performing Arts	15.6	3.8	1.0
Visual Arts	27.6	7.0	1.3
Alpine Skiing	21.4	4.6	1.5

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

Of the activity-based market segments of special interest to the CTC, Winter Outdoor Activity Participants are among the smallest. At 15.0 million, this segment is appreciably smaller than Soft Outdoor Adventure Enthusiasts (35.5 million), Heritage Tourism Enthusiasts (34.5 million), Visual Arts Enthusiasts (27.6 million), and Wine/Culinary Enthusiasts (21.6 million).

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

Over half of Winter Outdoor Activity Participants with recent Canadian leisure travel experiences are also Soft Outdoor Adventure Enthusiasts (59%), almost half are Heritage Tourism Enthusiasts (46%), about one-third are Visual Arts Enthusiasts (35%) and slightly fewer are Wine/Culinary Enthusiasts (32%). These overlaps suggest packaging, product development and marketing opportunities: sub-groups within the Winter Outdoor Activity Participants 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.

Many of these outdoor enthusiasts will also be found skiing on slopes – two-fifths of the "other" winter outdoor activity participants also claim to alpine ski and/or snowboard while on recent trips (1.5 million).

3.2 Where They Live & Where They Travel

Since Canada attracts the majority of its U.S.A. market from border states, it is not too surprising that many Winter Outdoor Activity Participants live in Tier I states – those immediately adjacent to the Canadian border. The level of prominence of Tier I state residents within this group is, however, somewhat surprising. Only about one-fifth of all American adults live in these border states (18%) but those who come to Canada and are Winter Outdoor Activity Participants represent twice this proportion, or two-fifths of the total market (41%). While the winter outdoors market draws particularly heavily on *near* markets, it is at close to parity for mid-tier states.

Canada is, however, comparatively unsuccessful in attracting Americans living considerable distances from the U.S./Canada border. Tier III states represent more than half of the U.S. adult population (54%) but fewer than one-third of the members of this winter outdoor group (30%).

Table 2: Geographic Distribution of U.S.A. Winter Outdoor Activity Participants

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Winter Outdoors
Adults 18+	*200.4 million*	*26.3 million*	*3.7 million*
Tier I (Border States)	18%	33%	41%
Tier II	28%	32%	29%
Tier III	54%	35%	30%

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 Winter Outdoor Activity Participants 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. U.S. Census regions that are particularly *under*-represented within this winter outdoor market segment include East South Central, South Atlantic and West South Central. For more regional information, please refer to Summary Table A-2, appended.

The comparative strength of the market in the northern tiers of the U.S.A. relative to the southern tier likely reflects the fact that Americans who grow up with a winter that offers cold weather activities such as ice fishing, snowmobiling and cross-country skiing are more apt to engage in these sports than those who grow up in more moderate climate zones. Thus, these winter outdoor activities are likely to be *typical* of their winter activities for many Tier I Americans, whereas they are more apt to be *exotic* for their more southern neighbours. It may also be the case that northern state residents in the U.S.A. are more likely to own the equipment required to snowmobile and cross country ski than are Tier III Americans.

American Winter Outdoor Activity Participants 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 (62%), followed by British Columbia (26%) and Quebec (26%). Smaller proportions visit Atlantic Canada (11%) and the Prairie provinces – Alberta (6%) and Manitoba/Saskatchewan (8%).

Ontario is the primary exception to the "typical" destination pattern for Americans. This province attracts 55 per cent of all American tourists over a two year period, but attracts 62 per cent of these winter enthusiasts.

There is a robust competitive environment for Canada within the Winter Outdoor Activity Participant 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 (23%), Europe (23%) and, less commonly, to other countries (10%).

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

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Winter Outdoors
Adults 18+	*200.4 million*	*26.3 million*	*3.7 million*
Canadian Destinations	**13%**	**100%**	**100%**
Atlantic Canada	2%	12%	11%
Quebec	3%	25%	26%
Ontario	7%	55%	62%
Manitoba/Saskatchewan	1%	7%	8%
Alberta	1%	10%	6%
British Columbia	4%	30%	26%
Territories	1%	4%	3%
Other Destinations			
Any U.S.A. Destination	69%	93%	95%
Mexico/Caribbean	15%	25%	23%
U.K./Other Europe	8%	18%	23%
Other Countries	7%	15%	10%
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 Winter Outdoor Activity Participants

Winter Outdoor Activity Participants are more likely to be men (58%) than women (42%) and are concentrated at the younger end of the adult age spectrum. Over half of them are between 18 and 44 years, with a higher proportion falling into the 35 to 44 year age group (31%) than in the 18 to 34 year age group (26%).

Table 4: Demographics of U.S.A. Winter Outdoor Activity Participants – Gender & Age

	Recent Leisure Travellers to Canada	
	Total	Winter Outdoors
Adults 18+	*26.3 million*	*3.7 million*
Men	51%	58%
Women	49%	42%
18 - 34 years	24%	26%
35 - 44 years	20%	31%
45 - 54 years	20%	23%
55 - 64 years	14%	11%
65+ years	17%	8%
Average Age	47.3 years	43.5 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, Winter Outdoor Activity Participants are substantively under-represented among older Americans. Half as many Winter Outdoor Activity Participants are at least 65 years of age (8%) as is the case among recent leisure travellers to Canada as a whole (17%). The over-representation of younger Americans and under-representation of older Americans explain why the average Winter Outdoor Activity Participants is only 43 or 44 years of age, compared to the 47 year average of the "typical" American visitor to Canada.

Winter Outdoor Activity Participants span the income and education spectrums, with 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. A slightly higher proportion claim to have household incomes in the $40,000 to $60,000 US range; and one third say their income is between $60,000 to $100,000 US. Incomes in excess of $100,000 US are characteristic of one-quarter of these outdoor enthusiasts (24%).

Table 5: Demographics of U.S.A. Winter Outdoor Activity Participants – Income & Education

	Recent Leisure Travellers to Canada	
	Total	Winter Outdoors
Adults 18+	*26.3 million*	*3.7 million*
Household Income		
Under $40,000	26%	20%
$40,000 - $59,999	24%	22%
$60,000 - $99,999	31%	34%
$100,000 or more	19%	24%
Average	$65,200 US	$72,400 US
Education		
Some Secondary or Less	6%	6%
Completed Secondary	19%	15%
Some Post Secondary	45%	46%
Graduated University	30%	33%

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 Winter Outdoor Activity Participants are somewhat more affluent than is the "typical" American traveller to Canada, with fewer winter outdoor sports participants 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 winter sports market – $72,400 US – than is the case for the typical American leisure visitor to Canada is $65,200 US.

Higher household incomes are consistent with higher levels of formal education: over one-third of Winter Outdoor Activity Participants have at least one university degree (33%) and a further 46 per cent have had some post-secondary education.

Most Winter Outdoor Activity Participants live in adult-only households – those with no members under the age of eighteen (59%), although two-fifths are likely to be in the market for winter outdoor tourism experiences that take into account the interests and needs of teenagers or children (41%). While adult-only households predominate among Winter Outdoor Activity Participants, these Americans are appreciably more likely to live in households with children under twelve years of age (34%) than is the typical leisure tourist to Canada from the U.S.A. (22%).

Table 6: Demographics of U.S.A. Winter Outdoor Activity Participants – Household Composition

	Recent Leisure Travellers to Canada	
	Total	Winter Outdoors
Adults 18+	*26.3 million*	*3.7 million*
Adult Only	71%	59%
Any Teens/Children	29%	41%
Any Children under 12	22%	34%

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

3.4 Travel Activities Among Winter Outdoor Activity Participants

3.4.1 Winter Outdoor Activities

Of the activities used to define Winter Outdoor Activity Participants, cross-country skiing has the largest following, attracting over half of these winter enthusiasts (52%). Snowmobiling, whether as day use on an organized trail (39%), or less commonly, as an overnight touring trip (8%) has been a leisure trip activity for two-fifths of these domestic tourists (40%, net). Ice fishing attracts about 1-in-5 Winter Outdoor Activity Participants on recent trips (19%) while ice climbing (7%) and dog sledding (5%) remain *niche* activities, appealing to comparatively few Winter Outdoor Activity Participants.

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

	Winter Outdoors
Adults 18+	*3.7 million*
Defining Activities	
Cross-county skiing	52%
Snowmobiling (net)	40%
Day use	39%
Overnight touring	8%
Ice fishing	19%
Ice climbing	7%
Dog sledding	5%
Other Winter Activities	
Downhill skiing	38%
Snowboarding	7%

Source: Special TAMS Tabulations, page 8.

Even though it is not used to define the Winter Outdoor Activity Participant segment, downhill skiing constitutes a trip activity for almost 2-in-5 of these Americans and snowboarding attracts about 1-in-14.

3.4.2 Other Outdoor Activities

The popularity of many warm weather outdoor activities among Winter Outdoor Activity Participants is consistent with the high level of overlap between these Americans and the Soft Outdoor Adventure Enthusiast segment. While on trips, over half of American Winter Outdoor Activity Participants view wildlife and/or hike or backpack in wilderness settings and slightly fewer go fishing in fresh water while on trips. About two-fifths view wildflowers and other flora, cycle, go kayaking or canoeing, and/or golf while on their holidays. One-third also go motor boating, and one-quarter might be found watching whales or birds. 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. Winter Outdoor Activity Participants – Other Outdoor Activities

	WINTER OUTDOORS
Adults 18+	*3.7 million*
Wildlife viewing	62%
Hiking/backpacking in wilderness settings	51%
Fishing - fresh water	45%
Wildflowers/flora viewing	43%
Cycling	41%
Kayaking or canoeing	40%
Golfing	38%
Motor boating	36%
Whale watching	27%
Bird watching	26%
Fishing - salt water	22%
Hunting	21%
White water rafting	19%
Sailing	18%

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

In fact, at least as many of these American winter enthusiasts claim to have been viewing wildlife or fishing on trips in the past two years as say they had been cross country skiing or snowmobiling (see 3.4.1).

3.4.3 Heritage Activities

As noted earlier, there is considerable overlap between the 3.7 million Winter Outdoor Activity Participants and the group of American travellers who are defined as Heritage Enthusiasts. The heritage experiences that might prove most attractive to Winter Outdoor Activity Participants include local festivals and fairs, general history museums as well as farmers' fairs or markets and science and technology museums. These heritage experiences have attracted close to half of the winter outdoors market segment while on a trip in the past couple of years.

Table 9: U.S.A. Winter Outdoor Activity Participants – Heritage Activities

	WINTER OUTDOORS
Adults 18+	*3.7 million*
Local festivals or fairs	54%
General history museums	50%
Farmers' fairs or markets	45%
Science & tech museums	45%
Historic sites	35%
Historical replicas of cities/towns	29%
Pow Wow/other Aboriginal celebrations/attractions	28%
Pick your own farms / harvesting	25%
Children's museums	23%
French Canadian cultural experiences	19%
Western theme events	15%
Carnivals such as Caribana/ Mardi Gras or Rio's Carnival	14%

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

Other heritage attractions widely sought by Winter Outdoor Activity Participants while on their travels include historic sites, replicas of historic towns or cities, and Aboriginal celebrations, attractions and events. Many of Canada's Aboriginal tourism experiences take place in settings that also offer outdoor winter experiences such as cross country skiing, snowmobiling, ice fishing and dog sledding. These heritage activities – along with visits to general history museums or science and technology museums – might be packaged with winter outdoor experiences to attract winter outdoor experiences.

3.4.4 Performing & Visual Arts Activities

With the exception of live theatre performances (43%), there is not a great deal of overlap between Winter Outdoor Activity Participants and activities that characterize Performing Arts Enthusiasts when they travel.

Table 10: U.S.A. Winter Outdoor Activity Participants – Performing & Visual Arts Activities

	WINTER OUTDOORS
Adults 18+	*3.7 million*
Performing Arts	
Theatre	43%
Ballet or other dance	23%
Classical music concerts	21%
Music festivals	20%
Jazz music concerts	20%
Theatre festivals	16%
Opera	14%
Musical attractions such as Jazzland	12%
Literary festivals	12%
Visual Arts	
Local arts & crafts studios	59%
Art galleries	47%
International film festivals	8%

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

Conversely, shopping or browsing in local arts and crafts studios (59%) and, to a lesser extent, going to art galleries (47%) are fairly widely sought by Winter Outdoor Activity Participants while on their trips. These activities that characterize the Visual Arts Enthusiast segment might be paired with winter outdoor experiences to help attract this market segment to Canadian destinations.

3.4.5 Other Attraction-Based Activities

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

Table 11: U.S.A. Winter Outdoor Activity Participants – Other Activities

	WINTER OUTDOORS
Adults 18+	*3.7 million*
Zoos	60%
Aquariums	47%
Botanical gardens	45%
Casinos	37%
Planetariums	24%
Horse races	18%
Auto races	16%

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

Since these attractions are *indoors*, they may provide welcome relief to Americans on trips in which they spend time engaging in winter outdoor experiences.

3.5 Ratings of Canada

Winter Outdoor Activity Participants 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 winter outdoor market who refrain from offering an opinion.

In this context, Canada is most highly rated by Winter Outdoor Activity Participants for attributes that support an *outdoors* image:

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

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*, is one of the best destinations for *outdoor activities*, is *safe* for visitors, has *friendly people*, 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 winter outdoors market are unable to rate the country on this dimension.

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

In light of their tourism interests, it would be expected that winter 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 (6.8 on a ten point scale) than do American travellers to Canada as a whole (6.3 on a ten point scale). Nonetheless, Winter Outdoor Activity Participants rate Canada significantly better as a *summer* destination (7.8 on a ten point scale) than as a place to go in the *winter*.

Table 12: U.S.A. Winter Outdoor Activity Participants – Attitudes Toward Canada

	Recent Leisure Travellers to Canada		
	Total	Winter Outdoors	
Adults 18+	*26.3 million*	*3.7 million*	
	Average #	Average #	Can't Rate %
Beautiful scenery	9.2	9.2	2%
Great place for fishing	8.7	8.7	29%
Great place to relax	8.6	8.7	3%
Clean/well cared for	8.7	8.6	2%
Lots for mature adults	8.6	8.5	6%
Lots for families	8.5	8.4	11%
Respects natural environment	8.5	8.3	5%
Great place for hunting	8.4	8.3	48%
One of best destinations for outdoor activities	8.2	8.3	11%
Safe for visitors	8.3	8.2	7%
Place with friendly people	8.4	8.2	2%
Lots for young adults	8.1	8.1	18%
Great place to experience adventure & excitement	8.0	8.1	6%
Offers excellent value for money	7.9	7.9	8%
One of best summer destinations	8.1	7.8	6%
Place with interesting shops	8.0	7.6	11%
Many cultural events & attractions	7.8	7.5	10%
Great place to experience city life	7.7	7.4	10%
Great place to experience different cultures	7.6	7.4	12%
Great place to see historic sites	7.5	7.2	9%
Great place for Aboriginal culture	7.4	7.2	32%
Place for romance	7.2	7.0	19%
One of best winter destinations	6.3	6.8	14%
Great place to experience "good life"	7.1	6.6	20%
Popular, trendy place	6.6	6.2	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 Winter Outdoor Activity Participants

There are several measures within TAMS that may help marketers reach Winter Outdoor Activity Participants with their messages:

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

Americans in the winter outdoor 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. Winter Outdoor Activity Participants – Print Media Read Regularly

	WINTER OUTDOORS
Adults 18+	*3.7 million*
Daily Newspaper (Any)	**89%**
Weekday edition	80%
Travel section of weekday edition	52%
Weekend edition	82%
Travel section of weekend edition	64%
Community newspapers	74%
Any Magazines	**95%**
News magazines	53%
Hobby magazines	44%
National Geographic	41%
Travel magazines	40%
Sports magazines	38%
Fashion/homemaking magazines	26%
General interest/city life magazines	20%

Source: Special TAMS Tabulations, page 14.

They are also avid magazine readers (95%), with about 4-in-10 claiming to read hobby magazines, National Geographic, and/or travel magazines on a regular basis.

Daily and weekend newspapers may have better reach among Winter Outdoor Activity Participants 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 (60%), followed by early evening news broadcasts (56%), and evening sitcoms (54%).

Table 14: U.S.A. Winter Outdoor Activity Participants – Television Programs Viewed Regularly

	WINTER OUTDOORS
Adults 18+	*3.7 million*
Movies	71%
Nature shows	65%
Professional sports	60%
Early evening news	56%
Evening sitcoms	54%
Evening drama	45%
Late evening news	43%
Instructional/hobby shows	42%
Morning news	35%
Daytime programs on weekdays	12%

Source: Special TAMS Tabulations, page 16.

In light of the fact that over two-fifths of Winter Outdoor Activity Participants 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 enthusiasts.

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

Over one-quarter of these winter enthusiasts say that they attend sportsmen's shows and/or boat shows on a regular basis and slightly fewer claim to go to RV/camper shows regularly. These venues may prove to be important marketing channels to get information about Canada's winter outdoors products to American Winter Outdoor Activity Participants.

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

	WINTER OUTDOORS
Adults 18+	*3.7 million*
Club/Organization Membership	
Auto club	52%
Sports club	41%
Art gallery/museum	23%
Nature organization	21%
Zoo/botanical garden	18%
Gardening club	5%
Regular Attendance at Travel/Trade Shows	
Sportsmen's shows	27%
Boat shows	27%
RV/Camper shows	20%
Travel shows	14%

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 winter outdoor 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 in1998 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 per cent, 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 Winter Outdoor Activity Participants

As noted in the demographic profile section of this report, the Winter Outdoor Activity Participants 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, and to one that is less concentrated in the northern tier states, the very characteristics that define Winter Outdoor Activity Participants help explain why growth in this market is predicted to be 59 per cent **lower** than would have been expected given today's population structure. The total Winter Outdoor Activity Participant market in the U.S.A. is predicted to grow from 15.0 million in 2000 to 16.6 million by 2025.

A similar pattern is evident for changes in the Winter Outdoor Activity Participant segment that takes leisure trips to Canada. This population is expected to increase from 3.7 million now to 4.7 million in 2025. This growth rate, at 26 per cent, is about 2 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 winter outdoor activity 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

Adults 18+ in millions	% of Adult Population In . . . 2000	2025	Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Total U.S.A. Adult Population	**200.4**	**254.3**	**27%**	
Winter Outdoor Activity Participants	15.0	16.6	11%	-59%
Winter Outdoor Activity Participants Who Take Leisure Trips to Canada	**3.7**	**4.7**	**26%**	**-2%**
Other CTC Activity Groups - Leisure Trips in Canada				
Soft Outdoor Adventure Enthusiasts	7.1	8.8	25%	-7%
Alpine Skiing	4.6	5.7	25%	-8%
Heritage Enthusiasts	8.3	12.3	47%	76%
Performing Arts Enthusiasts	3.8	5.1	35%	30%
Visual Arts Enthusiasts	7.0	9.2	31%	16%
Wine/Culinary Enthusiasts	5.5	7.5	35%	31%

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

5. Appendix

5.1 TAMS Definitions

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

	USA Adults	Recent Travellers to Canada	
	Total 200.4 million	Total 26.3 million	Winter Outdoors 3.7 million
New England	5%	8%	6%
Mid Atlantic	14%	19%	18%
South Atlantic	18%	12%	12%
East North Central	16%	23%	25%
West North Central	7%	5%	11%
East South Central	6%	3%	2%
West South Central	11%	5%	2%
Mountain	6%	6%	8%
Pacific	15%	18%	15%

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