



RESEARCH SERVICES

Travel Activities and Motivations of U.S. Residents: Activity Profile

Horseback Riding while on Trips

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Acknowledgments

The 2006 Travel Activities and Motivations Survey (TAMS), was a comprehensive survey of North American households designed to examine the recreational activities and travel habits and behaviours of Americans and Canadians over the past two-year period.

The survey was conducted in Canada and the United States between January 2006 and June 2006. Only adults (18 years and over) were recruited to complete the survey. The reference period for the data is 2004 and 2005.

TAMS was a partnership of the following organizations:

The Ontario Ministry of Tourism
The Ontario Tourism Marketing Partnership
The Canadian Tourism Commission
The Atlantic Canada Opportunities Agency
The Department of Canadian Heritage
Parks Canada
Statistics Canada

The Quebec Ministry of Tourism
Tourism Manitoba
Tourism Saskatchewan
Alberta Economic Development
Tourism British Columbia¹
The Government of Yukon
The Government of Northwest Territories

Alex Athanassakos of the Ontario Ministry of Tourism served as the project manager for the TAMS partnership.

This report was prepared by Lang Research Inc. on behalf of the project partners. Tourism British Columbia is pleased to acknowledge the major and continuing role played by the Ontario Ministry of Tourism in the TAMS partnership.

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Executive Summary

Over the last two years, 4.7% (10,506,278) of adult Americans went horseback riding while on an out-of-town, overnight trip of one or more nights. More adult Americans went on a sameday horseback riding excursion (4.6%) than went horseback riding with an overnight stop (0.6%). 24.7% of the Horseback Riders (2,590,739) reported that horseback riding was the main reason for taking at least one trip.

Unlike most other outdoor activity types, Horseback Riders are more likely to be female than male. The majority of horseback Riders range in age from 18 to 54 and they are typically married. They are more likely than the average U.S. Pleasure Traveler to have children under 18 living at home. They are very affluent with above-average household incomes and advanced university or post-graduate education. They are over-represented in Alaska and the Pacific, Mountain and East North Central regions of the United States.

Horseback Riders were more likely than the average U.S. Pleasure Traveler to have taken a trip to Canada in the past two years (24.8% versus 14.6%). The most common destinations were Ontario, British Columbia and Quebec; however, Horse-Back Riders were over-represented among U.S. Pleasure Travelers to all Canadian provinces and territories.

Horseback Riders were extremely active when on trips during the past two years. They were much more likely than the average U.S. Pleasure Traveler to participate in outdoor activities when on trips, and especially equestrian and nature-oriented activities. They exhibit particular interest in wildlife viewing, and hiking, climbing and paddling. They were also more likely than the average U.S. Pleasure Traveler to attend equestrian and western events, garden theme attractions and participate in agro-tourism. Wilderness tours and air tours in airplane or helicopter were also especially popular activities for this segment. Relative to the average U.S. Pleasure Traveler, Horseback Riders were more likely to have stayed at seaside resorts, public campgrounds, farm or guest ranches, ski or mountain resorts, and wilderness lodges.

Horseback Riders are most likely to consult the Internet when planning a trip and the majority (61.9%) have booked travel online. Horseback Riders are more likely than the average U.S. Pleasure Traveler to read the travel section of weekend newspapers and travel magazines, to watch travel-related television programs and to visit travel-related websites. They are also more likely than the average U.S. Pleasure Traveler to watch science and nature television programs and to read science and geography magazines.

Travel Activity and Motivation Survey (TAMS)

The TAMS survey examines the recreational activities and travel habits of Canadians and Americans. The survey examines out-of-town, travel behaviour of one or more nights over the past two years and provides detailed information on Travelers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

TAMS represents a comprehensive assessment of travel behaviour and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada. In particular, TAMS was designed to:

- Identify existing and potential tourism markets;
- Measure the likelihood of these tourism markets being attracted to vacation experiences in Canada;
- Create packaging opportunities for each of these markets;
- Determine how to reach these markets (i.e., in terms of media strategies); and
- Provide information on how to fine-tune and target existing marketing campaigns.

TAMS was sponsored by the following organizations:

Ontario Ministry of Tourism	Quebec Ministry of Tourism
Ontario Tourism Marketing Partnership Corporation	Travel Manitoba
Canadian Tourism Commission	Tourism Saskatchewan
Atlantic Canada Tourism Partnership	Parks Canada Agency
Department of Canadian Heritage	Tourism British Columbia
Alberta Tourism, Parks, Recreation and Culture	Government of Yukon
Government of Northwest Territories	Statistics Canada

The survey was conducted in Canada and the United States between January 2006 and June 2006 and it includes only adults (18 years and over). The reference period for the data is 2004 and 2005.

The U.S. database is used in this current report. This survey was conducted by mail with an established U.S. mail panel. 60,649 completed questionnaires were returned. The mail panel response rate for this survey was 71.3%. The data have been weighted to project the results to the United States population.

This report profiles persons who went horseback riding while on a trip, and compares them with other U.S. Pleasure Travelers (i.e., those who took at least one pleasure trip or vacation in the last two years). This report is part of a series of 43 Activity Reports prepared using the U.S. TAMS database.

Horseback Riding While on Trips

Market Incidence

Over the last two years, 4.7% (10,506,278) of adult Americans went horseback riding while on an out-of-town, overnight trip of one or more nights. 4.6% went horseback riding on a sameday excursion, 0.4% went horseback riding with an overnight stop and 0.3% participated in both activities.

Of those who went horseback riding while on trips, 24.7% (2,590,739 adult Americans) reported that this activity was the main reason for taking at least one trip in the past two years. Horseback riding with an overnight stop (63.4%) was much more likely than sameday excursions on horseback (22.5%) to be reported as the main reason for taking at least one trip during the past two years.

Fig. 1 Incidence of Horseback Riding While on Trips¹

	Number of Horseback Riders ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total U.S. Population ⁵
Size of Market	10,506,278	2,590,739	170,510,241	222,846,268
Horseback Riding (All Activities)	10,506,278	24.7%	6.2%	4.7%
Horseback riding sameday excursion	10,166,431	22.5%	6.0%	4.6%
Horseback riding with an overnight stop	945,959	63.4%	0.6%	0.4%
Participated in both activities	606,112	48.3%	0.4%	0.3%

- 1 - "Trips" are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.
- 2 - "Horseback Riders" are defined as individuals who went horseback riding while on an out-of-town, overnight trip of one or more nights during the past two years and who took at least one out-of-town pleasure trip of one or more nights during the past two years. This column reports the number of individuals who participated in the activity on at least one trip during the last two years.
- 3 - This column reports the percent who participated in each activity who stated that the activity was the main reason for taking at least one trip during the past two years.
- 4 - "Pleasure Travelers" are defined as individuals who have taken at least one out-of-town, overnight pleasure trip of one or more nights in the last two years. This column reports the percent of Pleasure Travelers who participated in each activity on at least one trip during the last two years.
- 5 - This column reports the percent of the Total U.S. Adult Market who participated in each activity on a trip during the past two years.

Incidence by Region, State and Population Size

Horseback Riders tend to be over-represented relative to the average U.S. Pleasure Traveler in Alaska and the Pacific, Mountain and East North Central regions of the United States. They are more likely than average to live in either a town (population of 100,000 to 499,999) or in a large city (2 million or more).

Fig. 2 Geographic Distribution & Population Size of Those Who Go Horseback Riding While on Trips

	Total Population	Estimated Number Who Went Horseback Riding on a Trip	Percent of Pleasure Travelers in Region Who Went Horseback Riding on a Trip	Percent of Total Regional Population Who Went Horseback Riding on a Trip
United States	222,846,268	10,506,278	6.2%	4.7%
New England	11,095,629	427,712	5.0%	3.9%
Middle Atlantic	31,005,526	1,336,432	5.8%	4.3%
East North Central	34,621,254	1,685,464	6.3%	4.9%
West North Central	15,024,360	707,194	5.9%	4.7%
South Atlantic	42,602,998	1,925,130	6.0%	4.6%
East South Central	13,597,436	500,720	5.2%	3.7%
West South Central	24,853,901	1,123,426	6.2%	4.5%
Mountain	15,030,720	872,234	7.2%	5.8%
Pacific	34,529,689	1,892,522	6.8%	5.5%
Alaska	484,754	35,443	8.4%	7.3%
Not available	745,757	51,340	8.3%	6.9%
Less than 100,000	29,429,442	988,657	4.8%	3.4%
100,000 to 499,999	36,551,501	1,700,827	6.3%	4.7%
500,000 to 1,999,999	52,335,815	2,232,800	5.6%	4.3%
2,000,000 or more	103,783,753	5,532,654	6.7%	5.4%

Horseback Riders are most likely to live in Utah, Nevada, Alaska, New Mexico, North Dakota, Georgia and Colorado. They are least likely to be from Rhode Island, Mississippi, West Virginia, Vermont, Connecticut and North Carolina (see Fig. 3 on next page).

Demographic Profile

In contrast to most outdoor activity segments, Horseback Riders are more likely to be female than male. Horseback Riders are typically between the ages of 18 and 54. Most are married and they are more likely than the average U.S. Pleasure Traveler to have dependent children (under 18) living at home. This segment is also relatively affluent with above-average household incomes (\$90,481) and post-graduate education.

Fig. 4 Demographic Profile of Those Going Horseback Riding on a Trip
Relative to All U.S. Pleasure Travelers

Attribute	Size of Market	Horseback Riders	Non-Horseback Riders ¹	Pleasure Travelers	Index ²
		10,506,278	160,003,963	170,510,241	100
Gender	Male	45.5%	48.7%	48.5%	94
	Female	54.5%	51.3%	51.5%	106
Age of Respondent	18 to 24	14.4%	10.6%	10.8%	133
	25 to 34	23.0%	20.8%	21.0%	110
	35 to 44	21.8%	17.0%	17.3%	126
	45 to 54	26.0%	20.7%	21.0%	123
	55 to 64	10.8%	15.8%	15.5%	70
	65 Plus	4.0%	15.1%	14.4%	28
Average Age		40.4	45.8	45.4	N/A
Marital Status	Not married	27.7%	30.7%	30.5%	91
	Married	72.3%	69.3%	69.5%	104
Parental Status	No children under 18	60.9%	70.6%	70.0%	87
	Children under 18	39.1%	29.4%	30.0%	130
Education	High school or less	14.4%	20.9%	20.5%	70
	Trade, Technical, Community Col.	19.2%	21.5%	21.4%	90
	University Degree	45.3%	40.8%	41.1%	110
	Post Graduate Degree	21.1%	16.8%	17.1%	123
Household Income	Under \$20,000	5.2%	8.3%	8.1%	64
	\$20,000 to \$39,999	11.4%	16.6%	16.2%	70
	\$40,000 to \$59,999	13.9%	16.9%	16.7%	83
	\$60,000 to \$79,999	15.2%	14.6%	14.7%	104
	\$80,000 to \$99,999	12.6%	11.5%	11.6%	109
	\$100,000 to \$149,999	19.0%	14.0%	14.4%	132
	\$150,000 or more	12.2%	6.3%	6.7%	183
Not stated	10.5%	11.8%	11.7%	90	
Average Household Income		\$90,481	\$73,226	\$74,303	N/A

- 1 - "Non-Horseback Riders" are defined as individuals who took at least one out-of-town, overnight pleasure trip of one or more nights in the last two years but did not go horseback riding on any trip. The numbers of Horseback Riders and Non-Horseback Riders equal the number of Pleasure Travelers.
- 2 - The "Index" is calculated by dividing the percent for Horseback Riders in each group by the percent of U.S. Pleasure Travelers in each group. The Index indicates the extent to which Horseback Riders are over or under-represented relative to the average U.S. Pleasure Traveler. An index of 100 means the percent participating in the activity is the same as that of the average U.S. Pleasure Traveler. Index values over 100 indicate that those participating in the activity are over-represented relative to the average U.S. Pleasure Traveler. Index values less than 100 indicate that those participating in the activity are under-represented relative to the average U.S. Pleasure Traveler.

Travel Activity (During Last Two Years)

Horseback Riders were more likely than the average U.S. Pleasure Traveler to have traveled both within their own state and to other U.S. states in the past two years. They were also much more likely to have visited Mexico, the Caribbean and overseas destinations.

Horseback Riders were much more likely than the average U.S. Pleasure Traveler to have taken a trip to Canada in the past two years (23.5% versus 14.6%). They were most likely to have visited Ontario (14.0%), British Columbia (7.5%) and Quebec (5.3%). In relative terms, Horseback Riders were more likely than the average U.S. Pleasure Traveler to have visited all of the Canadian provinces or territories, and especially Alberta, Newfoundland and Labrador and Saskatchewan.

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

	Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market	10,506,278	160,003,963	170,510,241	100
All destinations	92.7%	84.9%	85.4%	108
Canada	23.5%	14.0%	14.6%	161
Newfoundland and Labrador	0.9%	0.4%	0.4%	220
Prince Edward Island	0.9%	0.6%	0.6%	155
New Brunswick	1.3%	0.8%	0.8%	157
Nova Scotia	2.1%	1.3%	1.3%	154
Quebec	5.3%	3.0%	3.1%	171
Ontario	14.0%	7.9%	8.3%	169
Manitoba	1.0%	0.5%	0.5%	187
Saskatchewan	1.0%	0.5%	0.5%	205
Alberta	2.8%	1.1%	1.2%	233
British Columbia	7.5%	3.9%	4.1%	181
Yukon	1.0%	0.5%	0.6%	173
Northwest Territories	0.6%	0.4%	0.4%	161
Nunavut	0.1%	< 0.1%	< 0.1%	174
Own State	87.4%	79.2%	79.7%	110
Other parts of the U.S.	95.4%	90.3%	90.6%	105
Mexico	25.9%	12.8%	13.6%	191
Caribbean	22.3%	12.1%	12.7%	175
All other destinations	17.1%	9.1%	9.6%	179

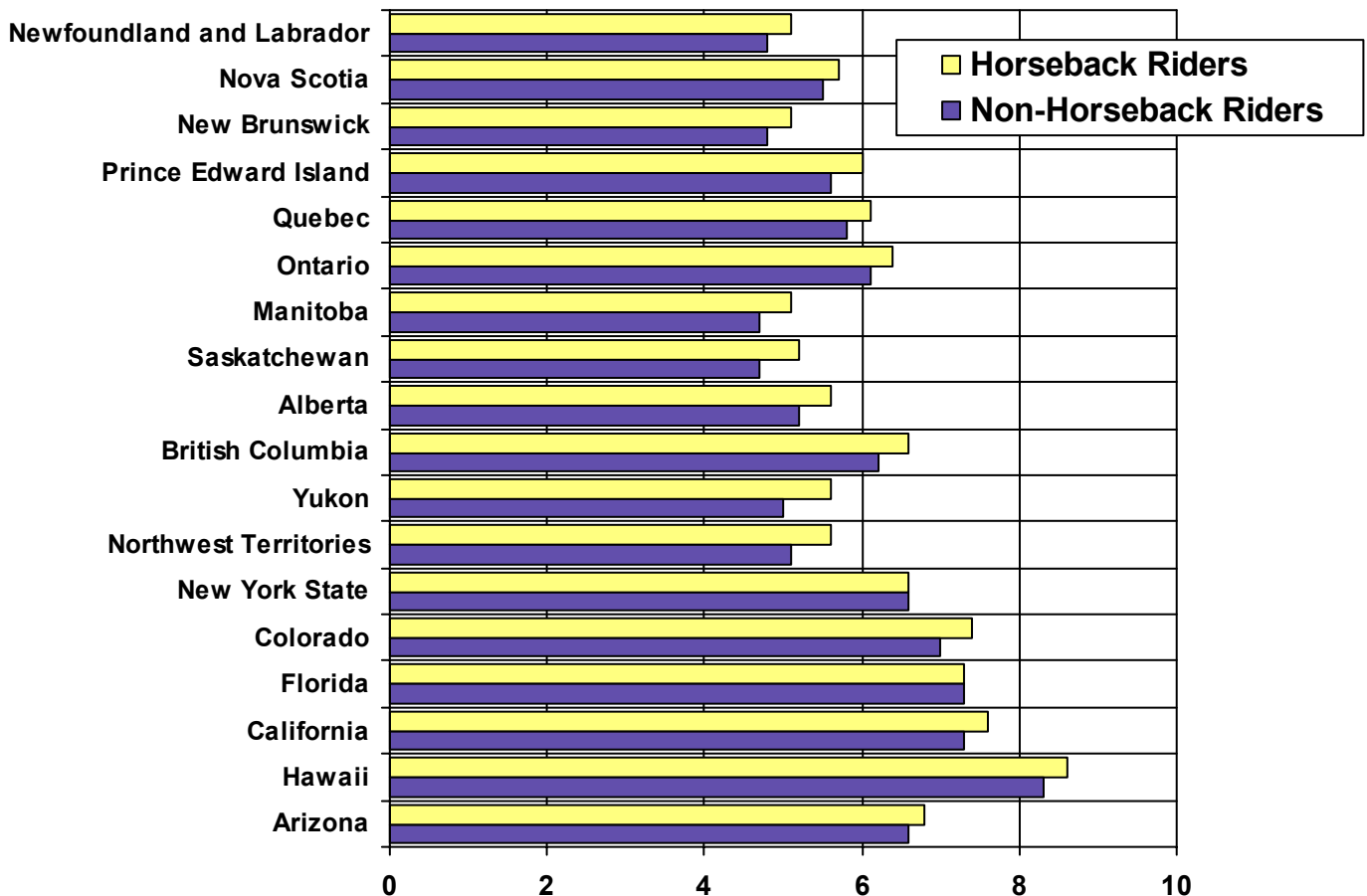
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

The respondents were asked to rate the appeal of each of Canada’s provinces and territories on a ten-point appeal scale where “10” is “Very Appealing” and “1” is “Very Unappealing”. They were also asked to rate selected U.S. states (New York State, Colorado, Florida, California, Hawaii and Arizona) to provide a frame of reference.

Overall, the appeal ratings of Horseback Riders tended to be higher than the ratings of those who did not go horseback riding on a trip regardless of the destination. British Columbia (6.6) was rated as the most appealing Canadian province, followed by Ontario (6.4), Quebec (6.1) and Prince Edward Island (6.0).

Overall, U.S. Pleasure Travelers rate the U.S. reference states as more appealing than the Canadian provinces or territories. Hawaii (8.6) received the highest rating among Horseback Riders.

Fig. 6 Overall Rating of Appeal of Provinces, Territories and Selected U.S. States on a 10-Point Appeal Rating Scale (Higher Scores=More Appealing)



Other Outdoor Activities Pursued While on Trips

Horseback Riders were extremely active while on trips in the past two years and were much more likely than the average U.S. Pleasure Traveler to have participated in all categories of outdoor activities. The majority of Horseback Riders participated in nature-oriented activities (e.g., ocean activities, wildlife viewing, and hiking, climbing and paddling) when on trips. Horseback Riders were also highly over-represented among those who participated in extreme skiing or extreme air sports, 'board & blade' activities (e.g., ice skating), sailing and surfing, cross-country skiing and snowshoeing, and scuba and snorkelling when on trips.

Fig. 7 Other Outdoor Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Outdoor Activity)

	Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market	10,506,278	160,003,963	170,510,241	100
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	66.7%	37.8%	39.6%	169
Wildlife Viewing	61.9%	33.1%	34.9%	177
Hiking, Climbing & Paddling	55.3%	21.4%	23.5%	236
Games & Individual Sports (e.g., tennis, board games)	47.3%	20.6%	22.2%	213
Boating & Swimming (e.g., motorboating, swimming in lakes)	45.1%	19.5%	21.0%	215
Fishing	33.7%	17.4%	18.4%	183
Exercising and Jogging	30.9%	13.0%	14.1%	220
Downhill Skiing and Snowboarding	21.2%	7.2%	8.0%	264
Snowmobiling & ATVing	20.6%	6.2%	7.1%	289
Golfing	20.1%	10.0%	10.7%	188
Team Sports (e.g., football, baseball, basketball)	18.6%	7.2%	7.9%	235
Cycling	17.4%	5.6%	6.3%	275
Sailing and Surfing (e.g., sailing, windsurfing, parasailing)	16.0%	4.0%	4.8%	336
Board and Blade (e.g., skateboarding, ice-skating)	14.9%	3.3%	4.0%	370
Scuba & Snorkelling	12.8%	3.5%	4.1%	315
Hunting	12.1%	5.0%	5.4%	224
Motorcycling	8.1%	2.7%	3.1%	265
Extreme Air Sports (e.g., parachuting, bungee jumping)	7.0%	1.4%	1.7%	408
Cross-country Skiing & Snowshoeing	6.3%	1.6%	1.9%	334
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	1.4%	0.3%	0.3%	415

Outdoor Activities Pursued While Not on Trips

The very high level of activity among Horseback Riders while on trips was also apparent when they were NOT traveling. When not on a trip, most Horseback Riders went on day outings to a park and picnicking, went swimming, exercised at home or at a fitness club, gardened at home and went hiking. Besides horseback riding, this segment was also much more likely than average to participate in cross-country skiing, ice skating, downhill skiing, snowboarding, and canoeing or kayaking when not traveling.

Fig. 8 Outdoor Activities Pursued While NOT on Trips

	Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market	10,506,278	160,003,963	170,510,241	100
Day outing to a park	73.3%	62.4%	63.1%	116
Swimming	71.4%	55.5%	56.5%	126
Exercising at home or at a fitness club	66.1%	55.4%	56.0%	118
Gardening	58.3%	52.7%	53.1%	110
Picnicking	57.1%	47.1%	47.7%	120
Hiking	50.1%	31.3%	32.5%	154
Horseback riding	43.9%	6.3%	8.6%	511
Fishing	41.0%	32.2%	32.8%	125
Camping	39.7%	25.8%	26.7%	149
Cycling	36.3%	22.0%	22.9%	159
Jogging	30.0%	18.8%	19.5%	154
Sailing or other boating	28.5%	19.4%	20.0%	143
Hunting	24.4%	17.9%	18.3%	134
Playing team sports	24.2%	15.2%	15.8%	153
Playing racquet sports (e.g., tennis or badminton)	23.1%	12.5%	13.2%	175
Riding an all-terrain vehicle (ATV)	19.5%	11.0%	11.5%	169
Hunting	18.5%	11.3%	11.8%	157
Canoeing or kayaking	15.8%	7.3%	7.8%	202
Rollerblading	13.8%	6.9%	7.3%	188
Ice-skating	12.2%	5.1%	5.5%	222
Downhill skiing	12.1%	5.3%	5.7%	211
Snowmobiling	6.4%	3.1%	3.3%	195
Cross-country skiing	5.7%	2.3%	2.5%	226
Snowboarding	5.7%	2.5%	2.7%	210
Skateboarding	4.3%	2.1%	2.2%	195

Culture and Entertainment Activities Pursued While on Trips

Horseback Riders were much more likely than the average U.S. Pleasure Traveler to participate in culture and entertainment activities in natural or outdoor settings, including participatory historical activities, equestrian and western events, aboriginal cultural experiences, archaeological digs and agro-tourism. They were also more likely to have attended sporting events (e.g., national & international sporting events, amateur tournaments) than the average U.S. Pleasure Traveler.

Fig. 9 Cultural and Entertainment Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Culture & Entertainment Activity)

	Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market	10,506,278	160,003,963	222,846,268	100
Shopping and Dining	90.6%	76.9%	60.4%	150
Historical Sites, Museums & Art Galleries	73.3%	52.2%	40.9%	179
Theme Parks & Exhibits	70.9%	47.5%	37.8%	188
Fairs and Festivals	63.7%	39.5%	31.7%	201
Casino, Theatre and Comedy Clubs	62.5%	44.3%	35.1%	178
Fine Dining and Spas	51.7%	31.7%	25.5%	203
Science and Technology Exhibits	42.0%	23.7%	19.1%	220
Wine, Beer and Food Tastings	41.4%	21.7%	17.7%	234
Equestrian & Western Events	35.9%	14.1%	12.0%	300
Rock Concerts and Recreational Dancing	31.6%	14.2%	11.8%	269
Agro-Tourism	29.3%	12.5%	10.4%	281
Garden Theme Attractions	27.9%	12.7%	10.5%	265
Professional Sporting Events	26.6%	15.4%	12.5%	214
High Art Performances	24.8%	10.0%	8.5%	293
Aboriginal Cultural Experiences	19.3%	7.9%	6.6%	292
Theatre, Film & Musical Festivals	18.0%	7.7%	6.5%	279
Amateur Tournaments	16.8%	7.1%	5.9%	284
Archaeological Digs & Sites	12.5%	5.1%	4.2%	295
Participatory Historical Activities	9.3%	3.6%	3.0%	308
National & International Sporting Events	6.2%	1.6%	1.4%	430

Culture and Entertainment Activities Pursued While Not on Trips

The majority of Horseback Riders dine in restaurants, attend festivals and fairs and visit zoos and aquariums when NOT traveling. They are also much more likely than the average U.S. Pleasure Traveler to attend rodeos when not on trips.

Fig. 10 Cultural and Entertainment Activities Pursued While Not on Trips

	Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market	10,506,278	160,003,963	170,510,241	100
Going out to eat in restaurants	94.2%	92.7%	92.8%	101
Going to festivals or fairs	73.8%	64.9%	65.5%	113
Going to zoos or aquariums	56.6%	44.9%	45.6%	124
Going to amusement or theme parks	47.5%	37.5%	38.1%	125
Going to amateur sporting events	46.6%	39.4%	39.9%	117
Going to historic sites or heritage buildings	46.5%	39.7%	40.1%	116
Going to museums	45.5%	37.0%	37.5%	121
Going to professional sporting events	43.1%	34.3%	34.9%	124
Going to live theatre	37.6%	28.6%	29.2%	129
Going to pick-your-own farms or farmers' market	37.1%	31.2%	31.6%	118
Going to art galleries or art shows	35.8%	27.2%	27.8%	129
Going to bars with live pop or rock bands	33.7%	22.9%	23.6%	143
Going dancing	31.3%	20.1%	20.8%	150
Going to rock music concerts	30.8%	20.7%	21.3%	145
Going to gamble in casinos	29.0%	27.9%	28.0%	104
Going to botanical gardens	25.0%	19.6%	20.0%	125
Going to classical music concerts	20.5%	14.5%	14.9%	138
Going to day spas	19.4%	9.7%	10.3%	189
Going to rodeos	18.3%	7.5%	8.2%	223
Staying overnight in a hotel or B&B in own city	16.3%	10.2%	10.6%	155
Going to jazz clubs	12.6%	7.6%	7.9%	160
Going to the ballet	12.0%	6.7%	7.0%	171
Going to the opera	8.8%	5.5%	5.7%	153

Accommodations Stayed In While on Trips

In the past two years, Horseback Riders tended to stay at a seaside resort or in a public campground while on a trip. This segment is also much more likely than the average U.S. Pleasure Traveler to have stayed at a farm or guest ranch, and at a wilderness lodge (including a lodge accessible by car and a remote or fly-in wilderness outpost or lodge). They were also more likely than the average U.S. Pleasure Traveler to have stayed at a cooking and wine tasting school while on a trip.

Fig. 11 Accommodations Stayed In While on Trips

	Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market	10,506,278	160,003,963	170,510,241	100
Seaside Resort	44.5%	37.0%	37.7%	118
A Public Campground in a National, State, Provincial or Municipal Park	41.9%	34.1%	34.8%	120
Lakeside / Riverside Resort	35.7%	24.5%	25.6%	139
Ski Resort or Mountain Resort	30.0%	17.2%	18.4%	163
A Private Campground	24.0%	20.6%	20.9%	115
A Camp Site in a Wilderness Setting (Not a Campground)	15.7%	9.0%	9.6%	163
Wilderness Lodge You Can Drive to by Car	14.2%	6.4%	7.2%	198
Health Spa	11.9%	5.9%	6.5%	184
Farm or Guest Ranch	11.2%	3.4%	4.1%	273
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	10.6%	8.5%	8.7%	122
Country Inn or Resort with Gourmet Restaurant	6.9%	3.8%	4.1%	170
On a Houseboat	5.8%	2.6%	2.9%	198
Remote or Fly-In Wilderness Lodge	3.9%	1.5%	1.7%	230
Cooking School	2.8%	1.0%	1.2%	239
Remote or Fly-In Wilderness Outpost	2.5%	0.7%	0.9%	273
Wine Tasting School	1.8%	0.8%	0.9%	207

Tours and Cruises Taken During Past Two Years

Horseback Riders were more likely than the average U.S. Pleasure Traveler to have taken tours or cruises during the past two years. They were especially likely to have taken an air tour as pilot or passenger of an airplane or helicopter, a Great Lakes cruise, a wilderness tour, a winery tour and a factory tour.

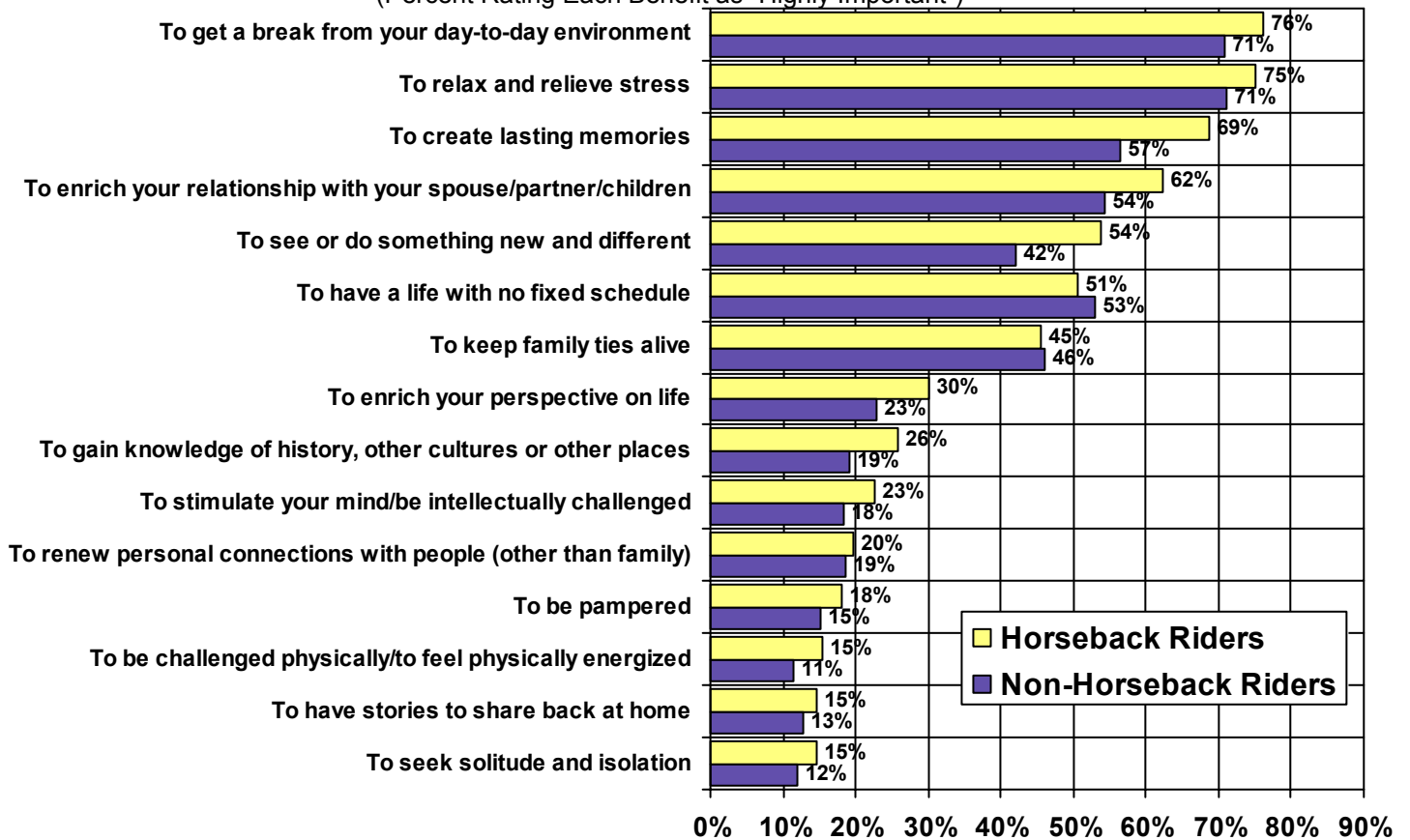
Fig. 12 Tours and Cruises Taken During Past Two Years

	Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market	10,506,278	160,003,963	170,510,241	100
An organized sameday guided tour while on an overnight trip	32.6%	17.6%	18.5%	176
A self-guided sameday tour while on an overnight trip	31.8%	18.4%	19.2%	166
Around the city	25.3%	15.1%	15.8%	160
Around the country side - scenic drives	24.1%	12.4%	13.1%	184
A self-guided overnight tour where you stayed in different locations	19.5%	9.8%	10.4%	188
Wilderness tour	17.7%	6.8%	7.4%	238
On the water (sightseeing cruise)	15.5%	7.3%	7.8%	199
Some other type of tour	14.7%	8.4%	8.8%	166
Caribbean ocean cruise	14.0%	8.7%	9.0%	156
An organized overnight guided tour where you stayed in different locations	13.1%	7.5%	7.9%	166
An organized overnight guided tour where you stayed in a single location	10.2%	6.5%	6.7%	151
Ocean cruise - Other	8.7%	4.5%	4.8%	182
To a casino	8.3%	4.7%	4.9%	169
To a winery	7.8%	3.3%	3.6%	218
Alaskan ocean cruise	4.3%	2.4%	2.5%	173
To a factory	4.3%	1.7%	1.8%	236
In the air as a pilot or passenger of an airplane or helicopter	4.2%	1.2%	1.4%	301
Cruise on another lake or river	3.7%	1.9%	2.0%	190
Some other type of cruise	3.1%	1.6%	1.7%	180
Great Lakes cruise	1.1%	0.3%	0.4%	292
Cruise on the St. Lawrence River	0.4%	0.3%	0.3%	155
Submarine cruise	0.4%	0.2%	0.2%	157

Benefits Sought While on Vacation

Most Horseback Riders take vacations in order to get a break from their day-to-day environment, to relax and relieve stress, to create lasting memories, to enrich family relationships, to see and do something new and different, and to live without a fixed schedule. Relative to the average U.S. Pleasure Traveler, Horseback Riders consider it more important that a vacation creates lasting memories and helps to enrich family relations and that the destination allows them to see or do something new and different. They are also more likely than average to seek out vacations that are intellectually stimulating, provide an enriched perspective on life and allow them to learn about the history and culture of the destination.

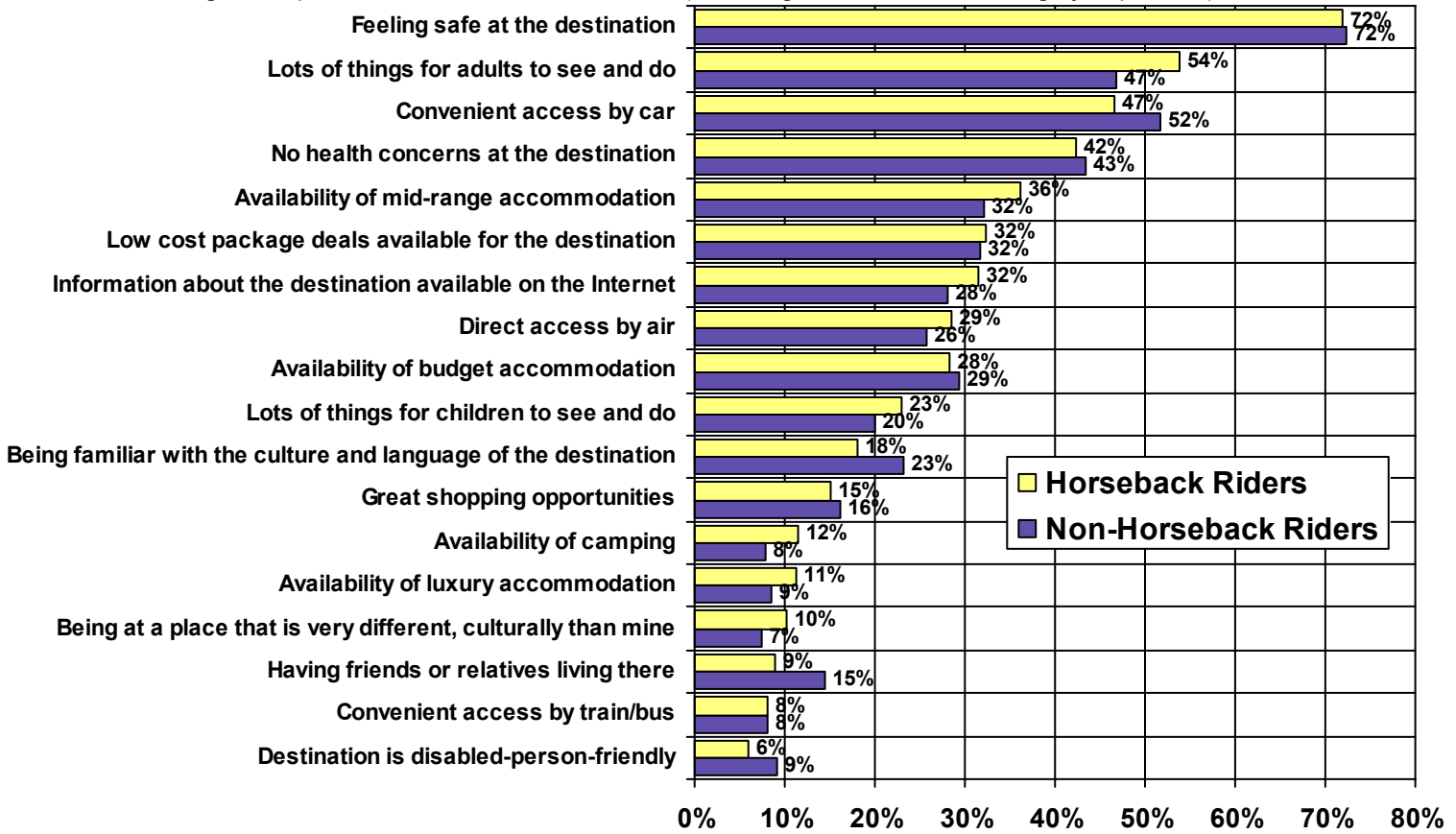
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

The majority of Horseback Riders consider it important that a destination is safe and offers lots of things for adults to see and do. They are less likely than those who do not go horseback-riding to consider it important that a destination is conveniently accessible by car, has a familiar culture and language and is situated in close proximity to their friends or relatives.

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



How Destinations Are Selected

Similar to the average U.S. Pleasure Traveler, most Horseback Riders start planning their trips with a particular destination in mind. However, they are more likely than the average U.S. Pleasure Traveler to begin planning a trip by thinking about specific activities that they want to do or by looking for package deals with no destination in mind.

Fig. 15 How Destinations Are Selected (Summer and Winter Vacations)

	Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market	10,506,278	160,003,963	170,510,241	100
Summer				
Started with a desired destination in mind	55.9%	58.4%	58.2%	96
Started by considering specific activities wanted to do	12.8%	9.7%	9.9%	129
Started with a certain type of vacation experience in mind	19.4%	17.1%	17.3%	112
Looked for packaged deals - no destination in mind	2.7%	1.0%	1.1%	242
Considered something else first	3.3%	4.7%	4.6%	72
Don't Know / Other	6.0%	9.1%	8.9%	68
Winter				
Started with a desired destination in mind	55.4%	59.2%	58.9%	94
Started by considering specific activities wanted to do	16.4%	10.8%	11.3%	146
Started with a certain type of vacation experience in mind	15.2%	14.7%	14.8%	103
Looked for packaged deals - no destination in mind	2.2%	1.4%	1.4%	151
Considered something else first	3.3%	5.5%	5.3%	62
Don't Know / Other	7.4%	8.3%	8.3%	89

Trip Planning and Information Sources Consulted

Most Horseback Riders are solely (41.6%) or partially responsible (17.4%) for planning vacation trips. They are more likely than the average U.S. Pleasure Traveler to consult a wide range of information sources when planning vacation trips. The majority of Horseback Riders consult Internet websites and consider their own past experiences and the advice of family and friends when planning vacation trips. Relative to the average U.S. Pleasure Traveler, Horseback Riders are particularly likely to obtain vacation travel information from trade, travel and sports shows, television programs and advertising, and travel guide books (e.g., Fodor's).

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market		10,506,278	160,003,963	170,510,241	100
Who Plans Trips?	Respondent plans trips	41.6%	39.0%	39.2%	106
	Trip planning a shared responsibility	17.4%	17.6%	17.6%	99
	Someone else plans trips	41.0%	43.4%	43.2%	95
Information Sources Consulted	An Internet website	86.6%	75.3%	76.0%	114
	Past experience / Been there before	60.3%	54.1%	54.5%	111
	Advice of others / Word-of-mouth	55.3%	44.7%	45.4%	122
	Maps	40.2%	32.2%	32.7%	123
	Official travel guides or brochures from state / province	32.3%	19.8%	20.6%	157
	An auto club such as AAA	30.4%	23.6%	24.0%	127
	Visitor information centres	29.9%	19.7%	20.4%	146
	Articles in newspapers / magazines	28.8%	17.4%	18.1%	159
	A travel agent	26.2%	18.1%	18.6%	141
	Travel information received in the mail	24.6%	15.2%	15.8%	156
	Travel guide books such as Fodor's	20.2%	11.4%	12.0%	169
	Advertisements in newspapers / magazines	17.7%	10.4%	10.9%	162
	Programs on television	12.4%	6.8%	7.1%	174
	An electronic newsletter or magazine received by e-mail	9.8%	5.7%	6.0%	163
	Advertisements on television	5.5%	3.9%	4.0%	139
Visits to trade, travel or sports shows	4.8%	2.3%	2.4%	197	

Use of the Internet to Plan and Arrange Trips

The Internet is a very important tool for Horseback Riders when planning and arranging their travel. The large majority (80.6%) use the Internet when planning trips and they are more likely than the average U.S. Pleasure Traveler to book at least part of their trip online (61.9%).

Most Horseback Riders use travel planning / booking sites such as Expedia, and hotel and airline sites. The majority have booked airline tickets and accommodations over the Internet for a trip. Horseback Riders are particularly more likely than the average U.S. Pleasure Traveler to have used the Internet to purchase vacation packages as well as rail, bus or boat / ship fares.

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

		Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market		10,506,278	160,003,963	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	19.3%	31.7%	31.0%	62
	Uses Internet to plan trips only	18.7%	20.2%	20.1%	93
	Uses Internet to book part of trip	61.9%	48.1%	48.9%	127
Types of Websites Consulted	A travel planning / booking website	66.5%	54.8%	55.6%	120
	A website of a hotel or resort	60.0%	52.8%	53.3%	113
	An airline's website	53.7%	44.9%	45.6%	118
	A tourism website of a country / region / city	46.5%	34.2%	35.1%	132
	A website of an attraction	43.0%	32.6%	33.4%	129
	Some other website	30.0%	24.7%	25.1%	120
	A cruise line website	18.5%	11.9%	12.4%	149
	A motorcoach website	1.7%	1.3%	1.3%	129
Parts of Trips Booked Over The Internet	Air tickets	78.1%	69.9%	70.6%	111
	Accommodations	77.7%	71.4%	71.9%	108
	Car rental	47.5%	37.2%	38.0%	125
	Tickets or fees for specific activities or attractions	34.9%	25.6%	26.3%	133
	A package containing two or more items	26.2%	17.1%	17.8%	147
	Tickets for rail, bus or boat / ship fares	20.0%	11.2%	11.9%	168
	Other	3.0%	2.9%	2.9%	101

Media Consumption Habits

Horseback Riders are very interested in travel-related media. Most Horseback Riders read the travel section of the weekend newspaper and visit travel websites. They are also more likely than the average U.S. Pleasure Traveler to read travel magazines and to watch travel-related programs on television. The Horseback Riders' interest in nature is also evident in their above-average consumption of science and geography magazines, and science and nature television programming. Horseback Riders exhibit particular interest in multicultural radio programming relative to the average U.S. Pleasure Traveler.

Fig. 18 Media Consumption Habits

		Horseback Riders	Non-Horseback Riders	Pleasure Travelers	Index
Size of Market		10,506,278	160,003,963	170,510,241	100
Newspaper Readership	Reads daily newspaper	58.5%	60.0%	59.9%	98
	Reads weekend edition of newspaper	55.4%	55.5%	55.5%	100
	Reads local neighbourhood or community newspapers	50.7%	49.5%	49.5%	102
	Reads other types of newspapers	15.6%	13.8%	13.9%	112
	Frequently or occasionally reads travel section of daily newspaper	47.5%	42.7%	43.0%	111
	Frequently or occasionally reads travel section of weekend newspaper	56.1%	48.9%	49.3%	114
Types of Magazines Read (Top 5 Indexed)	Travel (e.g., Condé Nast)	18.5%	10.1%	10.6%	174
	Photography and video	6.7%	3.7%	3.9%	171
	Magazines about your city	11.0%	6.6%	6.9%	160
	Outdoor activities/sports	16.9%	10.3%	10.7%	158
	Science and geography	20.5%	13.6%	14.0%	146
Type of Television Programs Watched (Top 5 Indexed)	Science & nature shows	44.1%	36.3%	36.8%	120
	Travel shows	33.9%	28.6%	28.9%	117
	Science fiction / Fantasy shows	27.9%	23.7%	24.0%	116
	Music/Music video shows / channels	32.0%	27.8%	28.1%	114
	Biography	36.8%	32.6%	32.9%	112
Type of Radio Programs Listened To (Top 5 Indexed)	Multicultural	8.2%	4.5%	4.7%	173
	Top 40 / Current hits	34.0%	25.6%	26.1%	130
	Modern rock / Alternative rock	42.5%	32.3%	32.9%	129
	Country music	38.9%	32.0%	32.4%	120
	Jazz / Big band	11.8%	9.9%	10.0%	118
Types of Websites Visited (Top 5 Indexed)	Sites for specific activities or interests	41.8%	31.9%	32.5%	129
	Travel	58.9%	47.2%	48.0%	123
	Magazine sites	18.0%	14.6%	14.8%	122
	House and home	34.2%	28.3%	28.7%	119
	Network news sites (e.g., CNN)	45.6%	38.2%	38.7%	118

Appendix One: U.S. TAMS 2006 Outdoor Activity Segmentation		
Activity Segment	Activities in Segment	
Golfing	Played During a Stay at a Golf Resort with Overnight Stay	Golf Tour Package to Play on Various Courses
	Played an Occasional Game While on a Trip	
Hunting	Hunting for Small Game	Hunting for Birds
	Hunting for Big Game	
Fishing	Fresh Water Fishing	Salt Water Fishing
	Ice Fishing	Trophy Fishing
Wildlife Viewing	Viewing Land Based Animals	Bird Watching
	Whale Watching & Other Marine Life	Visited National, Provincial /State Park
	Wildflowers /Flora Viewing	Viewing Northern Lights
Hiking, Climbing & Paddling	Mountain Climbing /Trekking	Fresh Water Kayaking /Canoeing
	Rock Climbing	White Water Rafting
	Hiking /Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
	Ice Climbing	Wilderness Skills Courses
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkelling in Sea /Ocean
	Sunbathing, Sitting on a Beach	Ocean Kayaking or Canoeing
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Scuba & Snorkelling	Scuba Diving in Lakes /Rivers	Scuba Diving in Sea /Ocean
	Snorkelling in Lakes /Rivers	
Exercising & Jogging	Working Out in Fitness Centre	Jogging or Exercising Outdoors
Cycling	Overnight Touring Trip	Recreational - Same Day Excursion
	Mountain Biking	
Motorcycling	Overnight Touring Trip	Same Day Excursion
Horseback Riding	With an Overnight Stop	Same Day Excursion
Snowmobiling & ATVing	All Terrain Vehicle - Overnight Touring Trip	Snowmobiling As an Overnight Touring Trip
	All Terrain Vehicle - Same Day Excursion	Snowmobiling Day Use on Organized Trail
Downhill Skiing & Snowboarding	Snowboarding	Downhill Skiing
Cross-country Skiing & Snowshoeing	Cross-country Skiing	Snowshoeing
Extreme Skiing	Heli-Skiing	Cross Country or Back Country as an Overnight Touring Trip
	Ski Jouring	
Hockey, Skating, Rollerblading & Skateboarding	Ice-Hockey	In-Line /Rollerblading
	Ice-Skating	Skateboarding
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	Bungee Jumping
Team Sports	Football	Basketball
	Baseball or Softball	Soccer
Games & Individual Sports	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	

Appendix Two U.S. TAMS 2006 Culture and Entertainment Segmentation		
Activity Segment	Activities in Segment	
Historical Sites, Museums & Art Galleries	Well-known Historic Sites or Buildings	Well-known Natural Wonders
	Other Historic Sites, Monuments and Buildings	Historical Replicas of Cities or Towns With Historic Re-Enactments
	Strolling Around a City to Observe Buildings and Architecture	Museum - Military /War Museums
	Museum - General History or Heritage Museums	Art Galleries
Shopping & Dining	Shop Or Browse - Bookstore or Music Store	Shop Or Browse - Antiques
	Shop Or Browse - Clothing, Shoes and Jewellery	Shop Or Browse - Gourmet Foods in Retail Stores
	Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	Shop Or Browse - Greenhouse or Garden Centre
	Dining - Restaurants Offering Local Ingredients and Recipes	Went to Local Outdoor Cafes
Aboriginal Cultural Experiences	Aboriginal Cuisine (Tasted or Sampled)	Aboriginal Arts and Crafts Shows
	Aboriginal Heritage Attractions (e.g., Museums, Interpretive Centres)	Aboriginal Cultural Experiences in a Remote or Rural Setting
	Aboriginal Festivals & Events (e.g., Powwows)	Aboriginal Outdoor Adventure and /or Sports
Fairs & Festivals	Farmers' Markets or Country Fairs	Firework Displays
	Carnivals	Ethnic Festivals
	Exhibition or Fairs	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Food /Drink Festivals	Circus
Science & Technology Exhibits	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
Theme Parks & Exhibits	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Wax Museums
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	Jazz Concert
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	
Theatre, Film & Musical Festivals	Theatre Festivals	International Film Festivals
	Comedy Festivals	Music Festivals
	Literary Festivals or Events	
Tastings	Went to Wineries for Day Visits and Tasting	Cooking /Wine Tasting Courses
	Went to Breweries for Day Visits and Tasting	Visited Food Processing Plants (e.g., Cheese Factory)
Casino, Theatre & Comedy Clubs	Stand-Up Comedy Clubs and Other Variety Shows	Live Theatre with Dinner
	Went to a Casino	Live Theatre
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National /Provincial Park
	Curatorial Tours	
National & International Sporting Events	National /International Sporting Events such as the Olympic Games	Curling Bonspiel
	Professional Figure Skating	Professional Soccer Games

Appendix Two		
U.S. TAMS 2006 Culture and Entertainment Segmentation		
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Rock Concerts & Dancing	Rock & Roll /Popular Music Concert	Recreational Dancing
Archaeological Digs & Sites	Archaeological Digs	Paleontological /Archaeological Sites
Equestrian & Western Events	Equine (Horse) Competitions	Country /Western Music Concerts
	Western Theme Events (e.g., Rodeos)	Auto Races
	Horse Races	
Fine Dining & Spas	High-End Restaurants with an International Reputation	Day Visit to a Health and Wellness Spa while on an Overnight Trip
	Other High-End Restaurants	
Agro-Tourism	Dining At A Farm	Harvesting and /or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	Entertainment Farms (e.g., Corn Maze, Petting Barnyard)
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related