

# A profile of travellers looking for accessible travel destinations

An Overview of North American Travellers based on the 2006 Travel Activities and Motivations Survey (TAMS)

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## EXECUTIVE SUMMARY

This report is based on the 2006 Travel Activities and Motivations Survey. In the survey, respondents were asked to indicate the importance (highly important, somewhat important or not at all important) of a **destination being disabled-person-friendly** in choosing a destination for an out-of-town pleasure or vacation trip.

In Canada, there were 1.2 million travellers (or 5.9% of all Canadian travellers) who indicated that an accessible travel destination was highly important to them when choosing a destination for an out-of-town pleasure or vacation trip. Another 3.2 million Canadian travellers (or 15.5%) indicated that this consideration was somewhat important to them in choosing their travel destination.

In the U.S., 16.1 million travellers (or 9.2% of all American travellers) indicated that an accessible travel destination was highly important to them when choosing a destination while another 32.5 million (or 18.4%) indicated it was somewhat important to them.

On average, Canadian and American travellers looking for accessible destinations are taking slightly fewer trips than other travellers.

The incidence of travel by those looking for accessible destinations is similar or a little lower than other travellers to destinations within their home country, but noticeably lower than other travellers outside of North America

Travellers who are looking for accessible travel destinations participate in a wide variety of activities while travelling, and though their participation rates are notably lower in some instances (e.g. hiking and skiing), they have similar or higher participation rates in almost half of the activities included in the survey.

There is, however, notable consistency among the most popular activities reported by travellers who are looking for accessible destinations and other travellers. In fact, of the top 25 activities listed by Canadian travellers who are looking for accessible destinations, only 4 do not factor on the list of top 25 activities of other Canadian travellers, while of the top 25 activities listed by American travellers who are looking for accessible destinations, only 3 are not on the list of top 25 activities of other American travellers.

There are a number of individual activities which are noticeably more or less popular among travellers looking for accessible travel destinations compared to other travellers.

Canadian travellers looking for accessible travel destinations:

- Have higher incidences than other travellers of attending horse races and competitions; attending aboriginal festivals; playing team sports like football and bowling; and participating in amateur tournaments and competitions other than sports
- Are much less likely than other travellers, however, to participate in active outdoor pursuits such as ocean snorkelling, ocean or freshwater kayaking/canoeing, hiking and skiing

American travellers looking for accessible travel destinations:

- Have much higher incidences than other travellers of attending comedy festivals; attending aboriginal festivals and outdoor adventure/sports activities; and going to the circus
- Are much less likely than other travellers, however, to participate in active outdoor pursuits such as skiing, ocean snorkelling, freshwater kayaking/canoeing, hiking and golfing

Travellers looking for accessible travel destinations reported many of the same trip motivators as did other travellers. Whereas there were similarities in terms of 'traditional' vacation trip activities such as visiting historic sites, natural wonders and nature parks, camping and going to amusement parks and casinos, there were also a number of trip motivators which emerged as notably more or less important among travellers looking for accessible travel destinations.

Looking at the 25 most popular activities which acted as trip motivators, Canadian travellers looking for accessible travel destinations:

- Reported shopping for clothes/shoes/jewellery, sunbathing/ sitting on a beach and fresh water fishing as their top three activities which were trip motivator
- Mentioned the following activities more frequently than other travellers → shopping for clothes/shoes/ jewellery, visiting amusement parks, going to casinos, eating at local restaurants, going to the zoo, seeing live theatre and staying at private campgrounds
- Mentioned the following activities less frequently than other travellers → sunbathing, swimming in oceans and strolling around a city to observe buildings and architecture

Looking at the 25 most popular activities which acted as trip motivators, American travellers looking for accessible travel destinations:

- Reported visiting amusement parks, going to casinos and eating in local restaurants as their top three activities which were trip motivators
- Mentioned the following activities more frequently than other travellers → going to casinos, eating at local restaurants, shopping for clothes/shoes/ jewellery, fresh water fishing and visiting aquariums and zoos
- Mentioned the following activities less frequently than other travellers → sunbathing / sitting on a beach or swimming in the ocean

Travellers looking for accessible travel destinations appear to seek a greater number of benefits from their travel experiences than do other travellers. Their incidence of rating benefits as highly important was higher than other travellers for each of the benefits presented in the survey, except for 'Taking a break from the day-to-day environment' – where their incidence of rating it as highly important was just slightly lower than other travellers.

The four most frequently mentioned benefits sought – to relax and relieve stress, enrich relationship with spouse/children, take a break from the day-to-day environment and create lasting memories were constant among travellers looking for accessible travel destinations and other travellers in both the Canadian and American markets.

The top benefits which were noticeably more important to travellers looking for accessible travel destinations than other travellers were:

- To have stories to share back at home or something interesting to talk about
- To be challenged physically / to feel physically energized
- To be pampered
- To stimulate the mind/ / be intellectually challenged

Travellers looking for accessible travel destinations appear to consider a greater number of factors in their choice of travel destinations than do other travellers. Their incidence of rating each of the considerations listed on the survey as highly important was markedly higher than other travellers in all cases, except for 'Availability of mid range accommodation' – where their incidence of rating it as highly important was only marginally higher than other travellers.

Travellers looking for accessible travel destinations and other travellers share the same four top considerations when choosing a travel destination – feeling safe at the destination, no health concerns at the destination, convenient access by car and lots of things for adults to see and do. These four considerations were consistent for travellers in both the Canadian and American markets, though more American travellers – both those looking for accessible travel destinations and others – rated 'Convenient access by car' as highly important than 'No health concerns at the destination'.

The top considerations which were noticeably more important to Canadian travellers looking for accessible travel destinations than other Canadian travellers were:

- Being familiar with the culture and language of the destination
- Convenient access by train/bus
- Lots of things for children to see and do
- Having friends and family who live there

Meanwhile, American travellers looking for accessible travel destinations differed somewhat from their Canadian counterparts in terms of considerations which were more important to them than other travellers:

- Convenient access by train/bus
- Being at a place that is very different , culturally, than yours
- Having friends and family who live there
- Great shopping opportunities

Finally, in looking at the demographic profiles of Canadian and American travellers looking for accessible travel destinations, it can be seen that the segment is generally older than other travellers, less likely to have children under 18 living at home, has lower levels of education and has lower household incomes than other travellers.

## INTRODUCTION

This report is based on the 2006 Travel Activities and Motivations Survey (TAMS), which examines the recreational activities and travel habits of Canadians and Americans over a two-year period (2004 and 2005), relating to travel of one or more nights. The survey provides detailed information on travellers' activities, travel motivators, places visited, type of accommodation used, their impressions of Canada, demographics and media consumption patterns.

TAMS was sponsored by the following organizations:

Ontario Ministry of Tourism	Quebec Ministry of Tourism
Ontario Tourism Marketing Partnership	Tourism Manitoba
Canadian Tourism Commission	Tourism Saskatchewan
Atlantic Canada Opportunities Agency	Alberta Economic Development
Department of Canadian Heritage	Tourism BC
Parks Canada	Government of Yukon
Statistics Canada	Government of Northwest Territories

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

The Canadian survey consisted of a telephone and a mail back survey:

- The household response rate of the telephone survey was 65.4%
- The paper questionnaire response rate was 53.5%
- The Canadian database consists of 53,150 completed records from the telephone survey and 24,692 completed paper questionnaires

The U.S. survey consisted only of a mail back survey as it used an existing panel:

- The panel's response rate for this survey was 71.3%
- The U.S. database consists of 60,649 completed responses

This report will focus on travellers who are seeking accessible travel destinations. In the survey, respondents were asked to indicate the importance of a number of different conditions, including accessible travel destinations. This is how the question appeared:

**How important are each of the following conditions when choosing a destination for an out-of-town pleasure or vacation trip of one or more nights?**

**Please indicate whether each of the conditions listed below is of no importance, somewhat important, or highly important to you personally.**

**Destination is disabled-person-friendly**

The sample size of the segment seeking accessible travel destinations was as follows:

	Somewhat important	Highly important
	Number of records in the database	
U.S. survey	8,536	4,048
Canadian survey	3,687	1,396

This report will seek to develop a profile of those travellers, both from Canada and the U.S., who stated that a destination being disabled person-friendly was highly important to them in choosing a destination for a trip. By focusing on this group exclusively, the report will endeavour to provide a more specific and actionable profile for this travel segment.

Throughout the report, a number of tables will present an index to assist in identifying whether there are any differences in the travel behaviours, patterns and motivations of travellers who are looking for accessible travel destinations versus other travellers.

The index is calculated by dividing the percentage of travellers who are looking for accessible travel destinations by the percentage of other travellers and indicates the extent to which the segment under study is over or under-represented relative to other travellers across any of the response categories. When interpreting the values of the index, a value of 100 means the percentage of the specific segment is the same as that of other travellers. Index values over 100 indicate that the specific segment is over-represented relative to other travellers while index values less than 100 indicate that the specific segment is under-represented relative to other travellers.

### How many travellers are looking for accessible travel?

In Canada, 1.2 million travellers (or 5.9% of all Canadian travellers) indicated that an accessible travel destination was highly important to them when choosing a destination for an out-of-town pleasure or vacation trip. Another 3.2 million Canadian travellers (or 15.5%) indicated that this consideration was somewhat important to them in choosing their travel destination.

In the U.S., 16.1 million travellers (or 9.2% of all American travellers) indicated that an accessible travel destination was highly important to them when choosing a destination for a trip while another 32.5 million (or 18.4%) indicated it was somewhat important to them.

Table 1. North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	Somewhat important	Highly important	Total	Somewhat important	Highly important	Total
Number of travellers (000s)	3,226	1,232	4,458	32,543	16,161	48,704
As a % of total travellers	15.5%	5.9%	21.4%	18.4%	9.2%	27.6%

Certainly, with 21.4% of Canadian travellers and 27.6% of American travellers considering accessibility status when choosing travel destinations, this topic is one that must be looked at in greater detail in order to better understand and respond to the needs, behaviours and motivations of this important travel market.

## How frequently are they travelling?

Canadian travellers looking for accessible travel destinations took an average of 3.3 trips<sup>1</sup> during the two-year period covered in the survey, slightly fewer than the 3.7 trips reported by other Canadian travellers. The situation was similar for American travellers, with those looking for accessible travel destinations taking an average of 3.2 trips compared to other American travellers who took an average of 3.6 trips.

## Where are they travelling?

The incidence of travel by those travellers looking for accessible destinations is similar to or a little lower than other travellers when it comes to destinations within their home country, but noticeably lower than other travellers outside of North America (see Table 2).

Table 2. Destinations visited by North American travellers who are looking for accessible travel destinations

	Canadian travellers looking for accessible travel destinations			American travellers looking for accessible travel destinations		
	# of travellers	% of travel segment	Index <sup>2</sup>	# of travellers	% of travel segment	Index
U.S.	442,336	40%	72			
Your own state	-	-	-	12,246,136	76%	96
Some other state	-	-	-	13,339,685	83%	92
CANADA						
Newfoundland & Labrador	56,334	5%	106	73,495	1%	115
Prince Edward Island	82,168	7%	96	71,941	*	*
New Brunswick	157,954	13%	113	108,637	1%	83
Nova Scotia	186,367	15%	124	174,948	1%	82
Quebec	389,594	32%	82	403,269	3%	81
Ontario	617,115	50%	96	1,146,560	7%	87
Manitoba	120,169	10%	108	75,724	1%	92
Saskatchewan	130,573	11%	94	76,020	1%	100
Alberta	248,804	20%	80	162,029	1%	85
British Columbia	225,749	18%	61	500,527	3 %	76
Yukon	5,085	*	*	99,590	1%	114
Northwest Territories	5,728	*	*	83,895	1%	141
Nunavut	11,141	*	*	12,782	*	*
OTHER COUNTRIES						
Mexico	60,950	5%	41	1,494,711	9%	68
South/Central America	15,035	1%	25	337,841	2%	62
The Caribbean	94,675	8%	50	1,367,891	9%	67
Europe (incl. U.K. & Russia)	86,199	7%	45	526,123	3%	35
Australia/New Zealand <sup>3</sup>	12,932	1%	37	76,759	1%	49
Africa	-	-	-	74,000	1%	64
Asia	54,463	4%	80	174,684	1%	35

\* Small sample size, number has been suppressed

Note: Percentages do not add up to 100% because travellers may have visited more than one destination.

<sup>1</sup> The average number of trips excludes non responses and those travellers who did not take pleasure or vacations trips. Responses of five or more trips were interpreted as five trips.

<sup>2</sup> The "Index" is calculated by dividing the percentage of travellers who are looking for accessible travel destinations by the percentage of overall travellers. The index indicates the extent to which the specific segment is over or under-represented relative to other travellers. An index of 100 means the percentage of the specific segment is the same as that of other travellers. Index values over 100 indicate that the specific segment is over-represented relative to other travellers. Index values less than 100 indicate that the specific segment is under-represented relative to other travellers.

<sup>3</sup> The Canadian dataset combined Australia/New Zealand and Africa, # of travellers shown for is for combined category.

### **Canadian travellers**

Canadian travellers looking for accessible travel destinations are more likely to travel to Nova Scotia and New Brunswick than other Canadian travellers, but are somewhat less likely to visit British Columbia or Quebec (see Table 2).

Their incidence of visitation to Ontario is slightly below that of other Canadian travellers.

Interestingly, travellers looking for accessible travel destinations are more likely to reside in the Atlantic provinces than other travellers (see Table 3), potentially accounting for their higher incidence of travel to most that region.

This segment's incidence of travel to the U.S. is lower than other Canadian travellers (about 25% less than other travellers), while their travel to other countries is also markedly lower. In fact, their incidence of travel to Mexico, South/Central America, the Caribbean and Europe is half or less than that of other Canadian travellers.

Table 3. Place of residence of Canadian travellers who are looking for accessible travel destinations

	Canadian travellers looking for accessible travel destinations		
	# of travellers	% of travel segment	Index
Atlantic Provinces	164,192	13.3%	201
Quebec	238,900	19.4%	84
Ontario	483,981	39.3%	101
Manitoba	45,918	3.7%	114
Saskatchewan	52,141	4.2%	145
Alberta	107,867	8.8%	81
British Columbia	138,537	11.2%	78

### **American travellers**

American travellers looking for accessible travel destinations are a little less likely to visit their own state than other travellers (4% lower incidence than other travellers), while their incidence of visitation of other states is 8% lower than the average American traveller (see Table 2).

Their incidence of visitation to Canada is lower than that of other American travellers (25% less than other American travellers). Reduced incidence of visitation can be seen in most of Canada, with the exception of the territories and Newfoundland.

Their travel to other countries is at least one third lower than other American travellers. In fact, the incidence of travel to either Europe or Asia for the segment looking for accessible travel destinations was only 35% of what it was for other American travellers.

## What activities is this segment participating in?

Travellers who are looking for accessible travel destinations participate in a wide variety of activities while travelling, and though their participation rates are notably lower in some instances (e.g. hiking and skiing), they are similar or higher in almost half of the activities included in the survey.

### **Most Popular Activities**

There is notable consistency among the most popular activities when comparing travellers who are looking for accessible destinations with other travellers.

In fact, of the top 10 activities reported by Canadian travellers looking for accessible travel destinations, 8 are also on the top 10 list of other travellers (see Table 4). Among the top 25 activities listed by travellers looking for accessible destinations, only 4 do not factor on the top 25 activities list of other Canadian travellers.

Table 4. Comparison of top 25 activities for Canadian travellers who are looking for accessible travel destinations vs. other Canadian travellers

Top 25 activities:	Canadian travellers looking for accessible travel destinations			Other Canadian travellers	
	Rank	% who participated	Index	Rank	% who participated
Shop/browse – clothing, shoes, jewellery	1	55%	95	2	58%
Restaurants - local ingredients/recipes	2	51%	88	1	58%
Shop/browse – bookstores or music stores	3	36%	85	3	42%
Went to local outdoor cafes	4	31%	78	6	40%
Shop local arts-crafts studio/exhibition	5	29%	76	7	38%
Went to casino(s)	6	29%	113	15	25%
Strolled around a city observe its buildings and architecture	7	28%	68	4	42%
Went to the movies/cinema	8	27%	95	12	28%
Swimming in lakes	9	26%	73	8	36%
Sunbathing/sitting on beach	10	25%	59	5	41%
Shop/browse – antiques	11	24%	100	19	24%
Farmers' markets or country fairs	12	23%	116	25	20%
Visited amusement parks	13	23%	104	22	22%
Nature park	14	22%	73	9	31%
Visited known historic sites/ buildings	15	21%	71	10	30%
Stayed at public campground park	16	21%	80	14	26%
Shop/browse – greenhouse/garden centre	17	21%	123	35	17%
Visited museum- general history/heritage	18	19%	80	20	24%
Fishing - fresh water	19	18%	87	23	21%
Dining in other high-end restaurants	20	18%	63	13	28%
Stayed at private campground	21	18%	93	27	19%
Visited zoos	22	17%	103	34	17%
Stayed in lakeside/riverside resort	23	17%	76	21	23%
Visited well known natural 'wonders'	24	17%	70	18	9%
Attended fireworks displays	25	17%	106	37	6%

The consistencies in terms of most popular activities are even more noticeable when looking at the American market, with the top 5 activities for travellers looking for accessible travel destinations identical to those listed by other American travellers (see Table 5). Among the top 25 activities listed by travellers looking for accessible destinations, only 3 do not factor on the top 25 activities list of other American travellers.

Table 5. Comparison of top 25 activities for American travellers who are looking for accessible travel destinations vs. other American travellers

Top 25 activities:	American travellers looking for accessible travel destinations			Other American travellers	
	Rank	% who participated	Index	Rank	% who participated
Restaurants – local ingredients/recipes	1	53%	89	1	60%
Shop/browse - clothing, shoes and jewelry	2	49%	97	2	51%
Went to casino(s)	3	35%	97	3	36%
Shop/browse - bookstores or music stores	4	33%	93	4	35%
Amusement park	5	32%	93	5	35%
Shop/browse - local arts & crafts studios or exhibitions	6	29%	83	7	35%
Strolling around a city to observe its buildings and architecture	7	26%	76	6	35%
Shop/browse - antiques	8	26%	108	16	24%
Went to the movies/cinema	9	25%	93	13	27%
Well known historic sites or buildings	10	25%	79	8	31%
Farmers' markets or country fairs	11	24%	126	22	19%
Went to local outdoor cafes	12	22%	76	10	29%
Other historic sites, monuments and buildings	13	22%	86	14	26%
Nature park	14	21%	79	12	27%
Zoos	15	21%	103	19	21%
Aquariums	16	21%	101	18	21%
Dining - other high-end restaurants	17	20%	77	15	26%
Sunbathing / sitting on a beach	18	19%	63	9	31%
Firework displays	19	19%	117	30	16%
Well known natural wonders	20	18%	82	17	22%
Swimming in oceans	21	18%	60	11	29%
Museum - general history or heritage	22	18%	87	20	20%
Fishing - fresh water	23	16%	110	32	15%
Stayed at a public campground	24	16%	93	24	17%
Shop/browse - gourmet foods in retail stores	25	16%	97	29	16%

### **Differences between the segments**

There are a number of individual activities which are noticeably more or less popular among travellers looking for accessible travel destinations compared to other travellers.

Canadian travellers looking for accessible travel destinations have higher incidences of attending horse races and competitions, attending aboriginal festivals, playing team sports like football and bowling, and participating in amateur tournaments and competitions other than sports (see Table 6). They are much less likely than other travellers, however, to participate in active outdoor pursuits such as ocean snorkelling, ocean or freshwater kayaking/canoeing, hiking and skiing.

Table 6. Comparison of activities which are notably MORE or LESS popular among Canadian travellers who are looking for accessible travel destinations vs. other Canadian travellers

	Canadian travellers looking for accessible travel destinations		Other Canadian travellers
	% who participated	Index	% who participated
<b>MORE POPULAR WITH TRAVELLERS LOOKING FOR ACCESSIBLE DESTINATIONS:</b>			
Attended horse races	7%	249	3%
Attended equine (horse) competitions	3%	211	1%
Aboriginal festivals and events	5%	189	3%
Participated in teams sport – football	2%	178	1%
Participated in amateur tournaments/competitions other than sports	2%	165	1%
Learned harvesting/other farm operations	5%	159	3%
Attended religious festivals	8%	155	5%
Participated in teams sport – bowling	6%	154	4%
Went fruit picking at farms/open fields	17%	152	11%
Stayed in RV while travelling/touring	7%	151	5%
<b>LESS POPULAR WITH TRAVELLERS LOOKING FOR ACCESSIBLE DESTINATIONS:</b>			
Snorkelling in sea/ocean	3%	29	11%
Kayaking or canoeing – ocean	1%	36	4%
Hiking - same day excursion	10%	41	25%
Skiing – downhill	6%	44	13%
Skiing - cross country	3%	46	6%
Snowshoeing	2%	47	4%
Mountain climbing/trekking	2%	51	3%
In-line/roller blading	2%	51	3%
Kayaking/canoeing – freshwater	6%	51	12%
Swimming in oceans	16%	55	29%

American travellers looking for accessible travel destinations have much higher incidences of attending comedy festivals, attending aboriginal festivals and aboriginal outdoor adventure/sports activities, and going to the circus (see Table 7). They are much less likely than other travellers, however, to participate in active outdoor pursuits such as skiing, ocean snorkelling of scuba, freshwater kayaking/canoeing, hiking and golfing.

Table 7. Comparison of activities which are notably MORE or LESS popular among American travellers who are looking for accessible travel destinations vs. other American travellers

	American travellers looking for accessible travel destinations		Other American travellers
	% who participated	Index	% who participated
<b>MORE POPULAR WITH TRAVELLERS LOOKING FOR ACCESSIBLE DESTINATIONS:</b>			
Comedy Festivals	3%	330	1%
Aboriginal outdoor adventure/ sports	3%	296	1%
Cooking school	1%	276	1%
Historical re-enactments (as an actor)	2%	250	1%
Aboriginal festivals and events	6%	234	2%
Attended professional figure skating	1%	198	1%
Learned harvesting /other farm operations	3%	195	2%
Circus	7%	192	4%
Hot air ballooning	2%	183	1%
Participated in amateur tournaments/competitions other than sports	2%	182	1%
<b>LESS POPULAR WITH TRAVELLERS LOOKING FOR ACCESSIBLE DESTINATIONS:</b>			
Skiing - downhill	2%	32	7%
Snorkelling in sea / ocean	4%	37	11%
White water rafting	1%	45	3%
Scuba diving in sea / ocean	2%	47	3%
Parasailing	1%	48	2%
Hiking - same day excursion while on a trip of one or more nights	9%	49	18%
Golfing - played during a stay at a golf resort for one or more nights	2%	49	3%
Kayaking or canoeing - freshwater	3%	50	5%
Golfing - played an occasional game while on a trip	5%	51	10%
Water skiing	3%	56	4%

For a more detailed review of the participation rates of the segment of travellers looking for accessible destinations across various activity categories, please consult the Appendix at the end of this report.

## What activities are trip motivators for this segment?

When asked whether any of the activities that they had participated in while on a trip was the main reason for taking at least one of their trips, travellers looking for accessible travel destinations reported many of the same trip motivators as did other travellers in general.

There was much overlap in terms of general pleasure or vacation trips activities such as visiting historic sites, natural wonders and nature parks, camping and going to amusement parks and casinos. Beyond these, the trip motivators of the segment looking for accessible travel destinations varied from those of other travellers. The differences are in some cases notable, and show variation between the Canadian and American markets.

### *Canadian Travellers*

The top three activities which were trip motivators for Canadian travellers looking for accessible travel destinations were shopping for clothes/shoes/jewellery, sunbathing/sitting on a beach and fresh water fishing (see Table 8).

Some of the more popular trip motivators for the segment looking for accessible travel destinations varied from those mentioned by other Canadian travellers.

Looking at the 25 most popular trip motivators for the segment looking for accessible travel destinations, shopping for clothes/shoes/ jewellery, visiting amusement parks, going to casinos, eating at local restaurants, going to the zoo, seeing live theatre, and staying at private campgrounds was mentioned more frequently by this segment than by other Canadian travellers. On the other hand, this segment was less likely than other Canadian travellers to report that sunbathing, swimming in oceans and strolling around a city to observe buildings and architecture was the main purpose for at least one of their trips.

There were similarities between Canadian travellers looking for accessible travel destinations and other Canadian travellers in terms of a number of the activities which acted as trip motivators for their travel during the study period. Some of the most significant common trip motivators include fresh water fishing, staying in public campgrounds, visiting nature parks and swimming in lakes.

There were also a number of trip motivators which were reported within the top 25 by Canadian travellers looking for accessible travel destinations which did not factor in the top 25 mentioned by other Canadian travellers. These included visiting water theme parks, going to farmers markets or country fairs, motor boating, going to exhibitions/fairs, and attending free outdoor concerts. Other Canadian travellers included downhill skiing, staying at seaside or ski/mountain resorts, and sameday or overnight hiking excursions among their top trip motivators while these did not appear on the list of the segment looking for accessible travel destinations.

Table 8. Comparison of top 25 activities acting as trip motivators for Canadian travellers who are looking for accessible travel destinations vs. other Canadian travellers

Top 25 activities listed as main reason of at least one trip:	Canadian travellers looking for accessible travel destinations			Other Canadian travellers
	Rank as top 25 main reasons	% indicating activity was main purpose	Index	% indicating activity was main purpose
<b>MORE FREQUENTLY MENTIONED BY TRAVELLERS LOOKING FOR ACCESSIBLE DESTINATIONS:</b>				
Shop clothes/ shoes/jewellery	1	19%	191	10%
Amusement parks	4	16%	129	12%
Went to casino(s)	7	14%	164	8%
Restaurant w/ local ingredients/recipes	9	12%	154	8%
Private campground	10	12%	127	9%
Zoos	11	12%	193	6%
Live theatre	13	10%	129	8%
<b>LESS FREQUENTLY MENTIONED BY TRAVELLERS LOOKING FOR ACCESSIBLE DESTINATIONS:</b>				
Sunbathing/sitting on beach	2	18%	71	18%
Swimming in oceans	19	9%	74	9%
Observe buildings & architecture	20	9%	73	9%
<b>SIMILAR FOR BOTH SEGMENTS:</b>				
Fishing - fresh water	3	16%	110	15%
Public campground	5	15%	91	17%
Nature park	6	14%	84	16%
Swimming in lakes	8	13%	105	13%
Lakeside/riverside resort	12	11%	107	11%
Well known natural wonders	15	10%	116	9%
Rock roll concerts	17	10%	117	9%
Amateur sport tournament/comp.	23	9%	109	8%
Known historic sites/buildings	24	8%	90	9%
Other historic sites/monuments/buildings	25	8%	90	6%
<b>ONLY MENTIONED BY TRAVELLERS LOOKING FOR ACCESSIBLE DESTINATIONS:</b>				
Water theme park	14	10%	236	-
Farmers markets/ country fair	16	10%	185	-
Motor boating	18	9%	177	-
Exhibitions/fairs	21	9%	170	-
Free outdoor concerts	22	9%	185	-
<b>NOT MENTIONED BY TRAVELLERS LOOKING FOR ACCESSIBLE DESTINATIONS:</b>				
Downhill skiing	-	-	-	12%
Seaside resort	-	-	-	10%
Hiking – same day excursion	-	-	-	8%
Ski resort/mountain resort	-	-	-	8%
Hiking - overnight	-	-	-	6%

### ***American Travellers***

The top three activities which were trip motivators for American travellers looking for accessible travel destinations were visiting amusement parks, going to casinos, and eating in local restaurants (see Table 9).

Some of the more popular trip motivators for the segment looking for accessible travel destinations varied from those mentioned by other American travellers. Looking at the 25 most popular activities which acted as trip motivators for the segment looking for accessible destinations, going to casinos, eating at local restaurants, shopping for clothes/shoes/ jewellery, fresh water fishing, visiting aquariums and zoos, and visiting other historic sites were mentioned more frequently by this segment than by other American travellers. On the other hand, this segment was less likely than other American travellers to report that sunbathing /sitting on a beach or swimming in the ocean was the main purpose for at least one of their trips.

A number of trip motivators were reported by similar proportions of both American travellers looking for accessible travel destinations and other American travellers. Some of the most significant include: going to amusement parks, visiting nature parks, well known historic sites/buildings and natural wonders, strolling around the city to observe architecture, and staying at public campgrounds.

There were also a number of trip motivators which were reported in the top 25 by American travellers looking for accessible travel destinations which did not factor in the top 25 mentioned by other American travellers. These included visiting farmers markets or country fairs, going to the movies, shopping for arts & crafts, books or antiques, viewing fireworks or going to museums. Other American travellers included rock & roll concerts, downhill skiing, staying at lakeside or ski resorts, hiking, attending baseball games, and swimming in lakes among their top trip motivators while these did not appear on the top 25 list of trip motivators of the segment looking for accessible travel destinations.

Table 9. Comparison of top 25 activities acting as trip motivators for American travellers who are looking for accessible travel destinations vs. other American travellers

Top 25 activities listed as main reason of at least one trip:	American travellers looking for accessible travel destinations			Other American travellers
	Rank as top 25 main reasons	% indicating activity was main purpose	Index	% indicating activity was main purpose
<b>MORE FREQUENTLY MENTIONED BY TRAVELLERS LOOKING FOR ACCESSIBLE DESTINATIONS:</b>				
Went to casino(s)	2	24%	126	19%
Restaurant w/ local ingredients/recipes	3	16%	201	8%
Shop clothes/ shoes/jewellery	6	14%	196	7%
Fishing - fresh water	8	12%	151	8%
Aquariums	9	12%	162	7%
Zoos	10	11%	151	8%
Other historic sites/monuments/buildings	14	10%	130	8%
Lakeside/riverside resort	20	8%	130	6%
<b>LESS FREQUENTLY MENTIONED BY TRAVELLERS LOOKING FOR ACCESSIBLE DESTINATIONS:</b>				
Sunbathing/sitting on beach	4	14%	78	18%
Swimming in oceans	15	10%	81	12%
<b>SIMILAR FOR BOTH SEGMENTS:</b>				
Amusement parks	1	26%	100	26%
Nature park	5	14%	95	15%
Known historic sites/buildings	7	13%	120	11%
Public campground	11	11%	110	10%
Observe buildings & architecture	13	11%	111	10%
Well known natural wonders	16	10%	98	10%
Water theme park	21	8%	120	7%
Seaside resort	22	8%	81	10%
<b>ONLY MENTIONED BY TRAVELLERS LOOKING FOR ACCESSIBLE DESTINATIONS:</b>				
Farmers markets/ country fair	12	11%	236	5%
Movies	17	10%	222	4%
Shop/browse – arts & crafts	18	9%	213	4%
Fireworks	19	8%	177	5%
Shop/browse – bookstores and music	23	8%	212	4%
Museums – general history/heritage	24	8%	150	5%
Shop/browse - Antiques	25	7%	204	4%
<b>NOT MENTIONED BY TRAVELLERS LOOKING FOR ACCESSIBLE DESTINATIONS:</b>				
Rock roll concerts	-	-	-	8%
Downhill skiing	-	-	-	7%
Lakeside/riverside resort	-	-	-	6%
Hiking – same day	-	-	-	6%
Attending baseball game	-	-	-	6%
Swimming in lakes	-	-	-	5%
Staying at a ski/mountain resort	-	-	-	5%

## Is this segment interested in camping?

Travellers who are looking for accessible travel destinations have a similar incidence of camping to other travellers (see Table 10).

And although a significant share of this segment uses a tent when camping (52% of Canadians and 40% of Americans looking for accessible destinations), the proportion of the group using a tent is much lower than for travellers in general. Relative to other travellers, this segment is more likely to stay in motor homes or trailers than other travellers.

Table 10. Participation rates in camping, and type of shelter used during camping trips by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
<b>PARTICIPATED IN CAMPING:</b>						
No	821,341	67%	96	11,517,682	71%	96
Yes	410,195	33%	109	4,643,131	29%	102
<b>TYPES OF SHELTER USED BY THOSE WHO WENT CAMPING:</b>						
Tent	212,097	52%	81	1,870,570	40%	72
Tent trailer	39,157	10%	123	304,647	7%	126
Truck camper or van	22,162	5%	108	334,748	7%	164
Travel trailer/fifth wheel	79,966	20%	131	765,953	17%	116
Motor home or RV	56,192	14%	165	933,993	20%	157

## Does this segment participate in tours?

Travellers who are looking for accessible travel destinations appear to participate in fewer tours than other travellers, with the exception of guided tours with a stay of one or more nights in a single location. The same trend is shown for both the Canadian and American segments (see Table 11).

Table 11. Participation in tours by North American travellers who are looking for accessible travel destinations

TYPES OF TOURS:	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
Guided tour with overnight stay(s) different locations	101,425	10.4%	85	1,180,796	10.4%	95
Guided group tour with overnight stay(s) in single location	95,346	9.7%	105	1,235,552	9.7%	119
Guided group SAME-DAY tour	156,800	16.0%	61	2,194,252	16.0%	74
Self-guided SAME-DAY tour	254,901	26.0%	76	2,519,885	26.0%	82
Self-guided tour with overnight stay(s) different locations	167,709	17.1%	81	1,370,701	17.1%	83

When looking at same day tours, the incidence of participation of Canadian travellers looking for accessible travel destinations is notably higher than other travellers in terms of taking same day tours to a casino (almost twice that of other travellers) and a little higher in terms of visiting factories (see Table 12). This segment participates in same day city tours at a similar rate to other travellers.

American travellers looking for accessible travel destinations are equally or more likely to participate in most same day tours as other American travellers, with the exception of wilderness/outdoor tours.

Table 12. Participation in same day tours by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
Same-day: countryside - scenic drive	199,656	54.1%	85	1,959,753	50.5%	117
Same-day: tour around the city	230,948	62.5%	105	2,213,541	57.1%	109
Same-day: pilot/passenger airplane/helicopter	14,845	4.0%	61	185,329	4.8%	102
Same-day: water tour (sightseeing cruise)	127,174	34.4%	76	1,001,889	25.8%	100
Same-day: winery/wineries	42,290	11.4%	81	488,698	12.6%	106
Same-day: factory/factories	27,371	7.4%	112	313,103	8.1%	136
Same-day: tour to a casino	113,940	30.8%	197	1,029,738	26.6%	171
Same-day: wilderness/outdoor tour	102,124	27.6%	85	737,981	19.0%	75
Same-day: some other type of tour	75,566	20.5%	83	1,134,116	29.2%	99

## What are the benefits sought from travel by this segment?

Travellers looking for accessible travel destinations appear to seek a greater number of benefits from their travel experiences than do other travellers (see Table 13). Their incidence of rating each of the listed benefits as highly important was higher than other travellers in all cases, except for 'Taking a break from the day-to-day environment' – where their incidence of rating it as highly important was just slightly lower than other travellers.

The four most frequently mentioned benefits sought – to relax and relieve stress, enrich relationship with spouse/children, take a break from the day-to-day environment and create lasting memories were constant among travellers looking for accessible travel destinations and other travellers in both the Canadian and American markets.

Those benefits which were noticeably more important to travellers looking for accessible travel destinations than other travellers were:

- To have stories to share back at home or something interesting to talk about
- To be challenged physically / to feel physically energized
- To be pampered
- To stimulate the mind/ / be intellectually challenged

Table 13. Benefits sought from pleasure travel by North American travellers who are looking for accessible travel destinations

BENEFITS SOUGHT FROM TRAVEL:	Canadian travellers HIGHLY IMPORTANT			American travellers HIGHLY IMPORTANT		
	# of travellers who said	% of travel segment	Index	# of travellers	% of travel segment	Index
To relax and relieve stress	812,934	66%	102	12,105,826	75%	106
Enrich relationship spouse/children	802,779	65%	126	10,214,140	63%	118
Break from day-to-day environment	771,478	63%	95	11,268,682	70%	99
Create lasting memories	768,206	62%	122	10,796,422	67%	120
Keep family ties alive	737,671	60%	142	10,009,877	62%	141
Have life with no fixed schedule	698,107	57%	120	10,040,354	62%	121
Do something different	555,283	45%	103	7,651,695	47%	113
Enrich your perspective on life	404,777	33%	120	5,200,751	32%	145
Renew personal connections	404,175	33%	181	4,955,733	31%	177
Knowledge of history/cultures/ places	350,961	29%	119	4,515,024	28%	148
Be physically challenged/energized	347,126	28%	189	3,785,573	23%	225
Stories share/something talk about	333,668	27%	226	4,280,453	27%	233
To be pampered	324,437	26%	210	4,647,366	29%	206
Stimulate mind -intellectually	318,031	26%	151	5,143,631	32%	184
Seek solitude and isolation	148,676	12%	130	2,693,074	17%	140

## What other considerations are important to this segment when they choose a travel destination?

Travellers looking for accessible travel destinations appear to consider a greater number of factors in their choice of travel destinations than do other travellers (see Table 14). Their incidence of rating each of the listed considerations as highly important was markedly higher than other travellers in all cases, except for 'Availability of mid range accommodation' – where their incidence of rating it as highly important was marginally higher than other travellers.

Travellers looking for accessible travel destinations share the same four top considerations as other travellers when choosing a travel destination:

- Feeling safe at the destination
- No health concerns at the destination
- Convenient access by car
- Lots of things for adults to see and do

These four considerations were consistent for travellers in both the Canadian and American markets, though more American travellers – both those looking for accessible travel destinations and others – rated 'Convenient access by car' as highly important than 'No health concerns at the destination'.

The top considerations which were noticeably more important to Canadian travellers looking for accessible travel destinations than other Canadian travellers were:

- Being familiar with the culture and language of the destination
- Convenient access by train/bus
- Lots of things for children to see and do
- Having friends and family who live there

American travellers looking for accessible travel destinations differed somewhat from their Canadian counterparts in terms of considerations which were more important to them than other travellers:

- Convenient access by train/bus
- Being at a place that is very different , culturally, than yours
- Having friends and family who live there
- Great shopping opportunities

Table 14. Considerations of North American travellers who are looking for accessible travel destinations when choosing a travel destination

CONSIDERATIONS IN CHOOSING A TRAVEL DESTINATION:	Canadian travellers HIGHLY IMPORTANT			American travellers HIGHLY IMPORTANT		
	# of travellers who said	% of travel segment	Index	# of travellers	% of travel segment	Index
Feeling safe at the destination	1,031,435	84%	129	14,233	88%	125
No health concerns at destination	818,848	67%	136	10,646	66%	161
Convenient access by car	811,194	66%	158	11,883	74%	150
Lots of things for adults to see/do	721,293	59%	160	10,467	65%	143
Low cost package deals for destination	609,418	50%	229	8,924	55%	187
Availability of budget accommodation	494,489	40%	192	7,916	49 %	178
Lots of things for children see/do	493,816	40%	266	6,016	37%	203
Direct access by air	467,324	38%	136	5,018	31%	124
Info. about destination on Internet	437,230	36%	148	5,332	33%	119
Familiar culture/language destination	424,985	35%	274	7,201	45%	216
Convenient access by train/bus	390,823	32%	266	3,507	22%	317
Availability of mid-range accommodation	365,309	30%	102	5,662	35%	110
Having friends/relatives living there	330,888	27%	264	4,951	31%	247
Great shopping opportunities	318,119	26%	224	5,150	32%	221
Availability of camping	238,197	19%	157	2,369	15%	200
Place is very different, culturally	186,420	15%	180	2,881	18%	272
Availability of luxury accommodation	158,964	13%	204	2,545	16%	195

## What are the demographics of the segment looking for accessible travel destinations?

Canadian and American travellers looking for accessible travel destinations were in general older than other travellers, were less likely to have children under 18 living at home, were less likely to have higher levels of education and had lower household incomes than other travellers.

Table 15. Demographic profile of North American travellers who are looking for accessible travel destinations when choosing a travel destination

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
<b>GENDER</b>						
Male	474,813	38.6%	77	6,302,000	39.0%	78
Female	756,723	61.4%	123	9,858,000	61.0%	122
<b>AGE</b>						
18 – 24	122,339	9.9%	77	1,088,000	6.7%	60
25 – 34	137,627	11.2%	59	1,963,000	12.1%	56
35 – 44	224,942	18.3%	89	1,997,000	12.4%	70
45 – 54	253,900	20.6%	102	3,660,000	22.7%	108
55 – 64	201,610	16.4%	115	3,371,000	20.9%	139
65+	291,118	23.6%	181	4,078,000	25.2%	186
<b>PARENTAL STATS</b>						
Children under 18	156,713	12.7%	73	3,163,780	19.6%	64
No children under 18	1,040,799	84.5%	104	12,996,220	80.4	136
<b>EDUCATION</b>						
High school or less	744,324	60.4%	167	5,394,083	33.8%	176
Some post-secondary or diploma/certificate	313,411	25.4%	78	7,064,166	43.7%	113
University degree	167,332	13.6%	45	3,319,945	20.5%	51
<b>HOUSEHOLD INCOME</b>						
Less than \$20,000	167,001	13.6%	226	3,389,668	21.0%	291
\$20,000 - \$39,999	284,586	23.1%	161	4,074,871	25.2%	162
\$40,000 - \$59,999	238,917	19.4%	115	2,896,854	17.9%	108
\$60,000 - \$79,999	136,961	11.1%	74	1,670,724	10.3%	69
\$80,000 - \$99,999	73,911	6.0%	49	940,911	5.8%	49
\$100,000 or more	97,064	7.9%	35	1,200,190	7.4%	34
Not stated	233,096	18.9%	146	795,853	4.9%	103

## APPENDIX: DETAILED REVIEW OF ACTIVITY CATEGORIES

### Water-based Outdoor Activities

Travellers who are looking for accessible travel destinations tend to be less active than other travellers in the area of water-based outdoor activities (see Table A).

- The participation rates of Canadian travellers looking for accessible destinations are lower than other travellers for all activities in this category, except for water skiing. Participation rates for this segment are similar (a little lower) to other travellers in the areas of fresh-water fishing and motor boating, two of the more popular activities in this category, but are significantly lower in the areas of sunbathing / sitting on a beach and swimming in lakes – the most popular activities in this category.
- American travellers in this segment appear a little more active than their Canadian counterparts, with their participation rates higher than those of the average travellers in the areas of fresh-water fishing, trophy fishing and, interestingly, kite surfing. Participation rates for this segment are a little lower than for other travellers in the areas of salt-water fishing, motor boating and swimming in lakes, and significantly lower in the areas of sunbathing / sitting on a beach and swimming in oceans – some of the most popular activities in this category.

Table A. Participation rates for water-based activities by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
<b>WATER-BASED OUTDOOR ACTIVITIES</b>						
Fishing - fresh water	209,130	18%	87	2,415,338	16%	110
Fishing - salt water	29,908	3%	61	979,998	7%	90
Fishing - trophy fishing	6,106	1%	71	156,003	1%	136
Kayaking or canoeing – freshwater	69,484	6%	51	394,046	3%	50
Kayaking or canoeing – ocean	16,385	1%	36	89,466	1%	24
Kite surfing	*	*	*	89,239	1%	278
Motor boating	187,009	17%	91	1,157,502	8%	83
Parasailing	8,956	1%	57	152,589	1%	48
Sailing	33,779	3%	66	361,730	2%	87
Scuba diving in lakes / rivers	*	*	*	55,148	*	*
Scuba diving in sea / ocean	*	*	*	228,291	2%	47
Snorkeling in lakes or rivers	9,143	1%	32	110,088	1%	63
Snorkeling in sea / ocean	34,630	3%	29	611,578	4%	37
Sunbathing or sitting on a beach	279,623	25%	59	2,835,264	19%	63
Swimming in lakes	295,156	26%	73	2,030,164	14%	81
Swimming in oceans	180,833	16%	55	2,580,663	18%	60
Water skiing	64,376	6%	104	332,716	2%	56
White water rafting	21,903	2%	70	212,380	1%	45
Wind surfing	12,408	1%	95	49,355	0.3%	88

\* Small sample size, number has been suppressed.

## Winter Outdoor Activities

Travellers who are looking for accessible travel destinations tend to be less active than other travellers in the category of winter outdoor activities, with the exception of two activities: overnight snowmobile touring trips and ice fishing (see Table B).

- The participation rates of Canadian travellers looking for accessible destinations are 36% higher than other travellers in terms of overnight snowmobiling trips and 32% higher for ice fishing. Their participation rate for snowboarding is similar to that of other travellers but their participation in day use snowmobiling and ice skating, two of the more popular winter activities, is lower than other travellers. Participation in downhill skiing, the third most popular activity in this category is less than half that of other travellers.
- The participation rates of American travellers looking for accessible destinations are 72% higher than other travellers for overnight snowmobiling trips and 5% higher for ice fishing. Their participation rates for downhill skiing, snowboarding and ice skating – the three most popular winter activities for American travellers, are notably lower than for other American travellers.

Table B. Participation rates for winter activities by North American travellers who are looking for accessible travel destinations

WINTER OUTDOOR ACTIVITIES	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
Dog sledding	2,719	*	*	31,307	*	*
Ice fishing	79,541	7%	132	213,684	1%	105
Ice-skating	102,369	9%	87	235,423	2%	69
Cross country skiing	32,441	3%	46	153,424	1%	70
Cross/back country skiing as an overnight touring trip	2,867	0.3%	21	30,686	*	*
Downhill skiing	63,358	6%	44	327,929	2%	32
Heli-skiing	*	*	*	18,444	*	*
Ski jouring	*	*	*	8,021	*	*
Snowboarding	47,545	4%	99	256,474	2%	64
Snowmobiling - day use on organized trail	47,026	4%	90	205,796	1%	71
Snowmobiling - as an overnight touring trip	25,998	2%	136	92,133	1%	172
Snowshoeing	23,425	2%	47	43,189	*	*

\* Small sample size, number has been suppressed.

## Land-based Outdoor Activities

Travellers who are looking for accessible travel destinations are more active in certain areas and less active in other areas than other travellers in the category of land-based activities (see Table C).

- Canadian travellers looking for accessible destinations have higher participation rates in the following activities: Horseback riding (with overnight stops or same-day), bungee jumping, skateboarding and hunting big and small game. These activities represent a broad set of specialized activities where the total volume of participants is relatively low. The participation rates of this segment are similar to those of other Canadian travellers in the area of ATV overnight trips and golf tours. Their participation rates, however, in the areas of visiting nature parks, same-day hiking excursions and occasional golf games – the three most popular activities in this category for the Canadian market – are markedly lower than that of other travellers.
- American travellers looking for accessible destinations appear to have different interests in some areas than the Canadian segment. They have higher participation rates in the following activities: Bungee jumping, horseback riding with overnight stops, ATV overnight trips, hunting small game, viewing the northern lights, viewing flora, and bird watching. Their participation rates are similar (a little higher) to those of other American travellers in the areas of overnight cycling trips, motorcycling (both overnight and day excursions) and wildlife viewing (land-based animals). Their participation rates, however, in the areas of visiting nature parks, same-day hiking excursions, mini-golf and occasional golf games – the four most popular activities in this category for the American market – are markedly lower than that of other travellers.

Table C. Participation rates for land-based activities by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
<b>LAND-BASED ACTIVITIES</b>						
All terrain vehicle (ATV) – same-day excursion	72,041	6%	82	791,458	5%	96
All terrain vehicle (ATV) - overnight trip	23,293	2%	95	202,497	1%	135
Bungee jumping	6,639	1%	159	105,497	1%	176
Climbing – Ice climbing	*	*	*	17,714	*	*
Climbing – Rock climbing	12,363	1%	64	205,124	1%	69
Climbing – Mountain climbing /trekking	18,876	2%	51	315,057	2%	73
Cycling – same-day excursion	84,248	7%	66	513,468	4%	67
Cycling - mountain biking	31,606	3%	67	223,636	2%	72
Cycling – overnight touring trip	5,410	1%	32	90,901	1%	109
Fitness – Working out in a fitness centre	85,660	8%	77	955,773	7%	61
Fitness – Jogging/exercising outdoors	106,163	9%	82	865,699	6%	60
Golfing - occasional game	132,666	12%	72	768,516	5%	51
Golfing - during a stay at a golf resort	36,716	3%	73	229,177	2%	49
Golfing - package golf tour to play on various courses	21,893	2%	92	133,502	1%	66
Hiking- same day excursion while on overnight trip	115,337	10%	41	1,337,880	9%	49
Hiking in wilderness with overnight camping	49,603	4%	57	486,109	3%	73
Horseback - Same day horseback riding excursion	61,327	5%	114	553,476	4%	60
Horseback - Traveled by horse with overnight stops	12,145	1%	290	125,924	1%	159
Hunting big game	50,903	5%	113	528,806	4%	93
Hunting small game	29,331	3%	117	474,566	3%	134
Hunting birds	15,680	1%	86	294,467	2%	98
In-line / roller blading	17,763	2%	51	150,909	1%	80
Mini-golf	106,586	9%	74	1,315,478	9%	63
Motorcycling – day excursion while on overnight trip	19,716	2%	70	425,648	3%	104
Motorcycling as an overnight touring trip	5,013	*	*	225,440	2%	103
Visited national, provincial, state nature park	253,640	22%	73	3,186,682	22%	79
Skateboarding	8,581	1%	118	82,318	1%	78
Viewing northern lights	56,759	5%	85	387,329	3%	119
Wildflowers / flora viewing	83,137	7%	70	1,528,180	10%	115
Wildlife viewing - Bird watching	86,226	8%	75	1,169,464	8%	111
Wildlife viewing - Whale watching/other marine life	70,550	6%	55	1,216,120	8%	98
Wildlife viewing - Watching land-based animals	118,662	11%	75	2,084,372	14%	107

\* Small sample size, number has been suppressed.

## Team Sport-related Activities

Travellers who are looking for accessible travel destinations are quite active in many activities in the category of team sports, tournaments and games (participating as a player), their participation rates surpassing those of other travellers in many instances (see Table D).

- Canadian travellers looking for accessible destinations have higher participation rates than other travellers in each the following activities while on a trip: squash, football, bowling, paintball, volleyball, soccer and badminton. Their participation rates are the same or similar to those of other Canadian travellers in the areas of hockey, curling and basketball. This segment, however, appears less interested in tennis, board games or beach volleyball than other Canadian travellers.
- American travellers for whom an accessible travel destination was an important consideration in selecting the destination were also quite active in this activity category. The segment had higher participation rates in each of the following activities while on a trip: paintball, badminton, basketball, soccer, volleyball, baseball, bowling, football and hockey. This segment appears notably less interested in tennis than other American travellers.

Table D. Participation rates for team sports-related activities by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
<b>TEAM SPORTS</b>						
Badminton	28,758	3%	127	181,271	1%	139
Baseball or softball	31,471	3%	89	663,432	5%	123
Basketball	17,663	2%	94	538,926	5%	128
Beach volleyball	33,402	3%	78	344,910	2%	91
Board games	56,321	5%	76	980,042	7%	90
Bowling	65,792	6%	154	913,574	6%	124
Curling	17,276	2%	98	17,622	*	*
Football	22,521	2%	178	409,860	3%	111
Ice hockey	60,022	5%	100	130,034	1%	107
Paintball	14,308	1%	150	188,742	1%	153
Soccer	38,831	3%	135	304,885	2%	127
Squash	8,078	1%	218	*	*	*
Tennis	22,785	2%	74	254,449	2%	62
Volleyball	39,948	4%	140	447,384	3%	127

\* Small sample size, number has been suppressed.

## Aboriginal Experiences & Activities

Travellers who are looking for accessible travel destinations participate more frequently than other travellers in aboriginal-related experiences and activities while on a trip in all but one of the activities reviewed (see Table E).

- Canadian travellers looking for accessible destinations have higher participation rates in each of the aboriginal activities listed, except for overnight aboriginal cultural experiences in a remote or rural setting. Their participation rates in festivals and events, aboriginal cuisine and arts and crafts shows are notably higher than those of other Canadian travellers.
- American travellers looking for accessible destinations have higher participation rates than other travellers in each activity in this category. The participation rate of this segment in the area of aboriginal outdoor adventures is almost three times that of other travellers, while their participation in festivals and events is more than twice that of other travellers.

Table E. Participation rates for aboriginal activities by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
<b>ABORIGINAL ACTIVITIES</b>						
Aboriginal cultural experiences in a remote or rural setting, 1+ nights	29,183	3%	92	442,780	3%	134
Aboriginal heritage attractions (e.g., museums, interpretive centres)	89,258	8%	106	1,048,861	7%	119
Aboriginal festivals and events (e.g., Pow Wows)	54,888	5%	189	806,660	6%	234
Aboriginal cuisine (tasted or sampled)	48,698	4%	132	545,848	5%	145
Aboriginal arts and crafts shows	71,961	6%	132	788,541	5%	163
Aboriginal outdoor adventure or sports	14,636	1%	112	384,249	3%	296

## Performing Arts

Travellers who are looking for accessible travel destinations are more active in certain areas and less active than other travellers in others in the category of performing arts, with the American segment generally more active than the Canadian segment (see Table F).

- Canadian travellers looking for accessible destinations have higher participation rates than other travellers in the areas of country/western music concerts, dinner theatre and opera. However, this segment appears less interested in attending jazz concerts, the ballet, rock & roll or classical music concerts than other Canadian travellers.
- American travellers looking for accessible destinations have higher participation rates than other travellers in a greater number of performing arts activities than their Canadian counterparts. This segment has notably higher participation rates in the areas of circus events, country/western concerts, dinner theatre and jazz concerts and somewhat higher participation in opera and free outdoor concerts. However, they appear a little less interested in attending rock & roll concerts, live theatre, classical concerts or the ballet.

Table F. Participation rates for the performing arts by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers (000s)	% of travel segment	Index
<b>PERFORMING ARTS</b>						
Ballet or other dance performances	52,004	5%	75	744,858	5%	94
Classical or symphony concert	61,378	5%	88	698,520	5%	90
Country / western music concerts	86,233	8%	143	1,572,457	11%	155
Free outdoor performance (e.g., theatre, concert) in a park setting	182,813	16%	93	2,285,049	16%	110
Jazz concert	30,761	3%	64	748,657	5%	138
Live theatre	176,018	16%	92	1,804,729	12%	89
Live theatre with dinner	115,209	10%	128	1,301,517	9%	140
Opera	31,709	3%	119	311,236	2%	113
Rock & roll / popular concert	128,685	11%	87	1,487,731	10%	82
Stand-up comedy clubs & other variety shows	98,840	9%	91	1,659,596	11%	99
Circus	43,733	4%	104	1,069,963	7%	192

## Festivals and Events

Travellers who are looking for accessible travel destinations attend festivals and events more frequently than other travellers while they are on a trip (see Table G). This was shown to be case for both the Canadian and American accessible travel segments, though the trend is more significant within the American set.

- Canadian travellers looking for accessible destinations have higher participation rates in all the festivals and events listed, except literary festivals. Their participation rates in religious festivals, western themed events, exhibitions/fairs and carnivals are notably higher than those of other travellers.
- American travellers looking for accessible destinations have participation rates that are either similar or higher than other travellers in each festival and event listed. The American segment has notably higher participation rates than other travellers in terms of comedy festivals, theatre festivals, literary festivals, religious festivals, film festivals, hot air balloon festivals, western themed events and carnivals.

Table G. Participation rates for festivals and events by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
<b>FESTIVALS &amp; EVENTS</b>						
Carnivals	94,022	8%	121	1,906,422	13%	147
International film festivals	23,481	2%	115	227,277	2%	166
Literary festivals or events	8,957	1%	68	229,200	2%	171
Music festivals	84,747	7%	102	1,274,651	9%	141
Theatre festivals	29,143	3%	111	382,616	3%	176
Farmers' markets or country fairs	258,238	23%	116	3,475,543	24%	126
Exhibition or fairs	162,292	14%	122	1,593,985	11%	98
Religious festivals	85,919	8%	155	1,210,548	8%	169
Food / drink festivals	73,525	7%	119	1,581,559	11%	106
Ethnic festivals	58,591	5%	120	826,648	6%	102
Western theme events such as rodeos	56,032	5%	141	704,833	5%	150
Gay pride parades	14,925	1%	129	275,124	2%	134
Firework displays	191,449	17%	106	2,773,267	19%	117
Hot air balloon festivals	20,012	2%	108	483,277	3%	155
Comedy festivals	23,929	2%	117	420,742	3%	330

## Theme and Amusement Parks

Travellers who are looking for accessible travel destinations are more active in certain areas and less active than other travellers in others in the category of theme and amusement parks, with the American segment generally more active than the Canadian segment (see Table H).

- Canadian travellers looking for accessible destinations when they travel have higher participation rates than other travellers in terms of visiting wax museums, entertainment farms and musical attractions. Their participation rates are similar to other travellers when it comes to amusement parks and zoos – the two most popular activities within this category.
- American travellers looking for accessible travel destinations, similar to the Canadian segment, have higher participation rates than other travellers in the areas of wax museums, entertainment farms and musical attractions. However, they also tend to visit garden theme parks and planetariums more frequently than other travellers, unlike their Canadian counterparts. Their participation rates are similar to other travellers when it comes to visiting amusement parks (7% lower), zoos and aquariums – the three most popular activities within this category for the American market.

Table H. Participation rates for theme and amusement parks by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
<b>THEME PARKS (NET)</b>						
Amusement park	255,134	23%	104	4,768,962	32%	93
Aquariums	109,289	10%	70	3,112,930	21%	101
Botanical gardens	141,340	13%	85	1,634,494	11%	91
Garden theme park	77,545	7%	99	1,004,932	7%	168
Musical attractions	65,319	6%	116	1,145,667	8%	168
Movie theme park	34,322	3%	84	1,031,008	7%	97
Planetarium	24,506	2%	67	851,304	6%	126
Science & technology theme park	63,586	6%	82	683,626	5%	94
Water theme park	112,207	10%	92	1,849,552	13%	98
Wax museums	57,169	5%	143	945,473	6%	159
Zoos	196,423	17%	103	3,149,809	21%	103
Entertainment farms (corn maze, petting zoo)	89,471	8%	122	1,169,479	8%	125

## Exhibits, Architecture, Historic Sites/Buildings and Museums

Travellers who are looking for accessible travel destinations tend to be less active than other travellers in the category of exhibits, architecture, historic sites and museums. This was shown to be case for both the Canadian and American segments in question (see Table I).

- The participation rates of Canadian travellers looking for accessible destinations were higher than other travellers in just two of the activities reviewed: children’s museums (28% higher) and military or war museums (5% higher). Their participation rates, however, are notably lower in terms of strolling around a city to observe buildings and architecture, visiting well known and other historic sites, natural wonders and history/ heritage museums, the five most popular activities in this category overall for the Canadian market.
- The participation rates of American travellers looking for accessible destinations were also lower than those of others travellers in all but two activities: visiting historical replicas of cities/towns with historical re-enactments and visiting military or war museums. Similar to their Canadian counterparts, this segment’s participation rates were notably lower in the five most popular activities mentioned above.

Table I. Participation rates for exhibits, architecture, historic sites/buildings and museums by North American travellers who are looking for accessible travel

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
<b>EXHIBITS, ARCHTECTURE, HISTORIC SITES (NET)</b>						
Art galleries	146,421	13%	66	1,518,693	10%	68
Historical replicas of cities/towns with historic re-enactments	105,644	9%	89	<b>1,495,428</b>	<b>10%</b>	<b>106</b>
Children's museums	<b>52,836</b>	<b>5%</b>	<b>128</b>	931,028	6%	99
General history or heritage museums	214,455	19%	80	2,580,023	18%	87
Science or technology museums	89,588	8%	76	1,460,175	10%	79
Military / war museums	<b>111,005</b>	<b>10%</b>	<b>105</b>	<b>1,558,838</b>	<b>11%</b>	<b>101</b>
Paleontological/archaeological sites	51,075	5%	63	583,355	4%	74
Strolling around a city to observe its buildings & architecture	317,970	28%	68	3,889,124	26%	76
Well known historic sites or buildings	242,882	21%	71	3,634,242	25%	79
Other historic sites monuments/ buildings	177,975	16%	63	3,269,818	22%	86
Well known natural "wonders"	191,734	17%	70	2,645,789	18%	82

## Hands-on Learning Activities

Travellers who are looking for accessible travel destinations participate more frequently than other travellers in a variety of hands-on learning activities while they travel (see Table J).

- Canadian travellers looking for accessible destinations when they travel have higher participation rates in five of the eight activities listed. They were more inclined to participate in historical re-enactments, harvesting and farm operations, and curatorial tours than other travellers. Their participation rates, however, are notably lower in terms of cooking or wine tasting courses or taking courses to learn another language.
- American travellers looking for accessible destinations have higher participation rates than other travellers in each activity in the hands-on learning category. This segment's participation rates in historical re-enactments and harvesting and farm operations were notably higher than those of other American travellers. They also showed significant interest in learning wilderness skills and taking part in interpretive programs.

Table J. Participation rates for hands-on learning activities by North American travellers who are looking for accessible travel destinations

HANDS-ON LEARNING ACTIVITIES (NET)	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
Archaeological digs	12,706	1%	116	216,916	2%	156
Cooking / wine tasting courses	24,476	2%	59	814,422	6%	135
Courses to learn another language	11,503	1%	50	180,086	1%	158
Curatorial tours	19,118	2%	130	233,025	2%	153
Harvesting and / or other farm operations	50,527	5%	159	419,074	3%	195
Historical re-enactments (as an actor)	10,251	1%	205	262,781	2%	250
Interpretive program at a historic site or park	45,905	4%	84	677,206	5%	176
Wilderness skills courses	19,013	2%	112	223,138	2%	181

## Spectator Sports/Competitions

Travellers who are looking for an accessible travel destination attend spectator events more frequently than other travellers while on a trip (see Table K).

- Canadian travellers looking for accessible destinations have higher participation rates in most of the spectator sports in this category, with their participation rates similar or higher than those of other travellers in 10 of the 14 activities listed. Participation rates of this segment are notably higher than those of other travellers in the areas of horse races, equine competitions, professional figure skating and amateur tournaments/competitions other than sports.
- American travellers looking for accessible travel destinations are also attending spectator events relatively more frequently while travelling than other American travellers, with participation rates similar to or higher than other travellers in 10 of the 14 activities in the category. Similar to their Canadian counterparts, this segment was more likely to attend horse races, equine competitions, professional figure skating and amateur tournaments/competitions other than sports but they also favoured attending basketball and soccer games.

Table K. Participation rates for spectator sports and competitions by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
<b>SPECTATOR SPORTS (NET)</b>						
Amateur sports tournaments/competitions	114,334	10%	91	857,663	6%	77
Amateur tournaments/competitions other than sports	25,130	2%	165	259,241	2%	182
Auto races	48,591	4%	105	1,026,180	7%	124
Professional baseball games	61,411	5%	102	1,475,611	10%	93
Professional basketball games	16,210	1%	98	616,844	4%	131
Professional figure skating	17,229	2%	203	180,554	1%	198
Professional football games	42,122	4%	111	913,976	6%	108
Professional golf tournaments	11,122	1%	100	150,333	1%	76
Professional ice hockey games	98,134	9%	91	347,232	2%	92
Professional soccer games	13,157	1%	108	174,972	1%	134
Horse races	73,933	7%	249	532,400	4%	118
Equine (horse) competitions	28,101	3%	211	200,846	1%	111
Curling bonspiel	21,182	2%	114	33,650	*	*
National/international sporting events, e.g., the Olympics games	10,491	1%	93	125,796	1%	179

\* Small sample size, number has been suppressed.

## Air-based Activities

Travellers who are looking for accessible travel destinations (only Americans are considered here due to the small sample size for Canadians) are participating in air-based activities while traveling more frequently than other travellers, though the total volume of participants is quite low (see Table L).

Table L. Participation rates for air-based activities by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
<b>AIR-BASED ACTIVITIES (NET)</b>						
Hang gliding	*	*	*	50,889	0.3%	156
Hot air ballooning	*	*	*	247,826	2%	183
Parachuting	*	*	*	82,387	1%	131

\* Small sample size, number has been suppressed.

## Other Recreational Activities

Travellers who are looking for accessible travel destinations have participation rates that are similar to (or a little higher than) other travellers in half of the recreational activities referenced in this category (see Table M).

- Canadian travellers looking for accessible destinations visit casinos and go to movies and IMAX theatres at a rate similar to or higher than that of other travellers while on trip. Their participation rates, however, are notably lower than other travellers in terms of photography, day visits to health/wellness spas and recreational dancing.
- American travellers looking for accessible travel destinations, like their Canadian counterparts, have similar or higher participation rates when it comes to visiting casinos and going to movies and IMAX theatres.

Table M. Participation rates for other recreational activities by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers (000s)	% of travel segment	Index
<b>OTHER RECREATIONAL ACTIVITIES (NET)</b>						
Day visit to a health and wellness spa	82,625	7%	74	837,898	6%	74
Photography	99,186	8 %	56	1,976,673	13%	82
Recreational dancing	63,104	6%	79	658,888	5%	89
Went to casino(s)	329,745	29%	113	5,175,310	35%	97
Went to the movies / cinema	305,850	27%	95	3,757,581	25%	93
Went to Imax movie theatres	131,675	12%	99	1,906,176	13%	103

## Shopping, Dining & Food-related Activities

Travellers who are looking for accessible travel destinations have participation rates that are similar or higher than those of other travellers in about half of the activities listed in the combined category of shopping, dining, and food-related activities. The trends were similar for both the Canadian and American segments in question (see Table N).

- Canadian travellers looking for accessible destinations when they travel have higher participation rates than other travellers in terms of fruit picking at farms/open fields, shopping at garden centres and visiting food processing plants, like a cheese factory for example. Their participation rates are similar to or slightly lower than other travellers when it comes to shopping for antiques or clothing/shoes, and dining at farms. They are less likely than other travellers to have dined at high-end restaurants, visited wineries or breweries or frequented outdoor cafes while on a trip.
- American travellers looking for accessible travel destinations, similar to their Canadian counterparts, have higher rates of participation in terms of fruit picking at farms, shopping at garden centres and visiting food processing plants. They are more likely than their Canadian counterparts to have dined at a farm or shopped for antiques. They too appear less inclined to have dined at high-end restaurants while on a trip, or to have visited a winery, brewery or outdoor café.

Table N. Participation rates for shopping, dining and food-related activities by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
<b>SHOPPING / DINING/ FOOD</b>						
<b>DINING</b>						
Dining at restaurants offering local ingredients & recipes	580,132	51%	88	7,889,795	53%	89
Dining at high-end restaurants of international reputation	155,577	14%	77	2,046,548	14%	80
Dining at other high-end restaurants	201,473	18%	63	2,922,201	20%	77
Dining at a farm	55,483	5%	96	766,246	5%	146
<b>SHOPPING</b>						
Bookstores or music stores	410,230	36%	85	4,844,227	33%	93
Antiques	271,466	24%	100	3,775,783	26%	108
Gourmet foods in retail stores	182,410	16%	90	2,296,630	16%	97
Local arts & crafts studios/exhibits	331,716	29%	76	4,222,885	29%	83
Clothing, shoes and jewelry	621,652	55%	95	7,256,231	49%	97
Greenhouse or garden centre	233,041	21%	123	1,962,567	13%	124
<b>FOOD-RELATED ACTIVITIES</b>						
Went to local outdoor cafes	353,200	31%	78	3,290,515	22%	76
Visited wineries for day visits/tasting	134,716	12%	70	1,851,983	13%	75
Visited breweries for day visits/tasting	49,721	4%	71	900,193	6%	75
Fruit picking at farms or open fields	188,525	17%	152	1,258,125	9%	147
Visited food processing plants (i.e. cheese factory)	87,179	8%	118	945,698	6%	115

## Accommodation-related Activities

Canadian travellers looking for accessible travel destinations appear to have stayed less frequently than other travellers in most of the accommodation types listed below. Their American counterparts, on the other hand, were more likely than other American travellers to have stayed in many of the different types of holiday accommodated listed (see Table O).

- Canadian travellers looking for accessible destinations were less likely than other travellers to have stayed at a cooking school, in a motor home or at a farm or guest ranch. Relative to other travellers, a similar number of those in this segment indicated they had stayed at remote wilderness lodges and private campgrounds. This segment was much less inclined towards staying at seaside, lakeside or mountain resorts.
- American travellers looking for accessible travel destinations were noticeable more likely to have stayed at cooking or wine tasting schools, in motor homes, at farms or guest ranches, in country inns and in houseboats. The American segment appeared, as did their Canadian counterparts, less inclined towards staying at seaside or mountain resorts.

Table O. Participation rates for accommodation-related activities by North American travellers who are looking for accessible travel destinations

	Canadian travellers			American travellers		
	# of travellers	% of travel segment	Index	# of travellers	% of travel segment	Index
<b>ACCOMODATION-RELATED ACTIVITIES (NET) - STAYED AT:</b>						
Lakeside / riverside resort	194,242	17%	76	1,786,917	12%	95
Ski resort or mountain resort	101,530	9%	65	829,124	6%	59
Seaside resort	133,836	12%	57	1,962,438	13%	69
Remote or fly-in wilderness lodge	17,634	2%	99	115,391	1%	92
Remote or fly-in wilderness outpost	*	*	*	72,253	1%	109
Wilderness lodge you can drive to by car	54,744	5%	85	537,166	4%	103
Cooking school	6,746	1%	170	210,956	1%	276
Wine tasting school	*	*	*	119,023	1%	195
Country inn or resort because it had a gourmet restaurant on the premises	49,280	4%	86	414,512	3%	143
Health spa	53,670	5%	81	505,293	3%	107
Farm or guest ranch	41,434	4%	123	442,294	3%	153
On a houseboat	11,848	1%	69	280,773	2%	133
A public campground in a nature park	238,358	21%	80	2,388,652	16%	93
A private campground	198,316	18%	93	1,606,904	11%	105
A camp site in a wilderness setting (not a campground)	75,096	7%	77	695,458	5%	98
A motor home or RV while traveling (not camping trip)	76,907	7%	151	933,449	6%	152