Demographic Profile

<table>
<thead>
<tr>
<th>Base: All Adults</th>
<th>Sample</th>
<th>Weighted (000)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target: SPORTS-PLAYED/PARTIC-EVERY CHANCE</td>
<td>23,689</td>
<td>231,659</td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td>776</td>
<td>7,755</td>
<td>3.35%</td>
</tr>
</tbody>
</table>

**General Statistics**
- Median Household Income: $85,301
- Median Age: 51.2
- Employed (Full or Part-Time): 69.3%
- Married: 69.7%
- Children in Household: 32%
- Homeowners: 79%

**Education**
- Less Than High School
- Some College
- High School Graduate
- Grad College or More

**Ethnicity**
- Hispanic
- Non-Hispanic
- White
- African-American
- Asian
- Other

**Race**
- 93.5%
- 6.5%
- 0.5%

**Income**
- $100,000 OR MORE
- $75,000 - $99,999
- $50,000 - $74,999
- $40,000 - $49,999
- $30,000 - $39,999
- $20,000 - $29,999
- Less than $20,000

**Age**
- 18 - 24
- 25 - 34
- 35 - 44
- 45 - 54
- 55 - 64
- 65+

**Gender**
- Male
- Female

* Indicates cell count from 31 to 60. Projections may be unstable, use with caution.
** Indicates cell count below 51. Projections are likely unstable, use with caution.

Source: Simmons Research LLC, Fall 2011 NHCS Adult Study 12-month
### Demographic Profile

**Base:** All Adults  
**Target:** SPORTS-PLAYED/PARTIC-EVERY CHANCE I GET: CANOEING/KAYAKIN

<table>
<thead>
<tr>
<th></th>
<th>Sample</th>
<th>Weighted (000)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>23,689</td>
<td>231,659</td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td>272</td>
<td>3,373</td>
<td>1.46%</td>
</tr>
</tbody>
</table>

#### General Statistics

- **Median Household Income:** $71,049
- **Median Age:** 39.9
- **Employed (Full or Part-Time):** 67.5%
- **Married:** 46.1%
- **Children in Household:** 47.2%
- **Homeowners:** 66.3%

![Income Chart](chart_image)

- **Less than $20,000:** 24%
- **$20,000 - $29,999:** 12%
- **$30,000 - $39,999:** 8%
- **$40,000 - $49,999:** 18%
- **$50,000 - $74,999:** 19%
- **$75,000 - $99,999:** 6%
- **$100,000 or More:** 6%

#### Education

- **Less Than High School:** 24%
- **High School Graduate:** 20%
- **Some College:** 24%
- **Grad College or More:** 24%

#### Ethnicity

- **Hispanic:** 86.0%
- **Non-Hispanic:** 14.0%

#### Race

- **White:** 88.1%
- **African-American:** 6.5%
- **Asian:** 3.4%
- **Other:** 3.0%

#### Age

- **18 - 24:** 24%
- **25 - 34:** 20%
- **35 - 44:** 24%
- **45 - 54:** 15%
- **55 - 64:** 12%
- **65+:** 4%

#### Gender

- **Male:** 54.3%
- **Female:** 45.1%

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* Indicates cell count from 31 to 60. Projections may be unstable, use with caution.  
** Indicates cell count below 31. Projections are likely unstable, use with caution.

Source: Simmons Research LLC, Fall 2013 NHCS Adult Study 12-month
### Sample: The number of people surveyed who meet both the column & row criteria

*There are 809 Females 18-34 that responded that they agree that they pay attention to ratings and reviews posted by other consumers.*

### Weighted (000): Expressed in thousands, the projected number of adults (18+) in the U.S. who meet both the column & row criteria

*There are 9,416,000 Females 18 – 34 in the U.S. that agree that they pay attention to ratings and reviews posted online by other consumers.*

### Vertical %: Percent of the column reached by the row

*Of Females 18-34, 28.3% [of them] agree that they pay attention to ratings and reviews posted online by other consumers.*

### Horizontal %: Percent of the row reached by the column

*Of respondents that agree that they pay attention to ratings and reviews posted online by other consumers, 25.2% are Females 18-34.*

### Index: The likelihood of the target to meet a specified criteria, expressed in relation to the base, where 100 = average

*Females 18-34 are 72% more likely to agree that they pay attention to ratings and reviews posted online by other consumers than the US Adult (18+) population overall.*
<table>
<thead>
<tr>
<th></th>
<th>Sample</th>
<th>VACATION ACTIVITIES - LIKE TO DO: CAMPING/HIKING</th>
<th>VACATION ACTIVITIES - LIKE TO DO: PLAYING GOLF</th>
<th>VACATION ACTIVITIES - LIKE TO DO: WATER SPORTS</th>
<th>VACATION ACTIVITIES - LIKE TO DO: TENNIS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>23,689</td>
<td>4,090</td>
<td>1,345</td>
<td>1,999</td>
<td>427</td>
</tr>
<tr>
<td>Weighted(000)</td>
<td>231,659</td>
<td>46,809</td>
<td>14,318</td>
<td>21,558</td>
<td>4,167</td>
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<tr>
<td>Vertical %</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.0%</td>
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<tr>
<td>Horizontal %</td>
<td>100.0%</td>
<td>20.2%</td>
<td>6.2%</td>
<td>9.3%</td>
<td>1.8%</td>
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<tr>
<td>Index</td>
<td>100</td>
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<td>100</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>AGE: 18 - 34</td>
<td>5,106</td>
<td>1,022</td>
<td>185</td>
<td>573</td>
<td>124</td>
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<tr>
<td>Weighted(000)</td>
<td>68,134</td>
<td>15,406</td>
<td>3,076</td>
<td>8,629</td>
<td>1,738</td>
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<td>Vertical %</td>
<td>29.4%</td>
<td>32.9%</td>
<td>21.5%</td>
<td>40.0%</td>
<td>41.7%</td>
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<tr>
<td>Horizontal %</td>
<td>100.0%</td>
<td>22.6%</td>
<td>4.5%</td>
<td>12.7%</td>
<td>2.6%</td>
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<tr>
<td>Index</td>
<td>100</td>
<td>112</td>
<td>73</td>
<td>136</td>
<td>142</td>
</tr>
<tr>
<td>AGE: 35 - 54</td>
<td>8,679</td>
<td>1,849</td>
<td>497</td>
<td>960</td>
<td>178</td>
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<tr>
<td>Weighted(000)</td>
<td>82,238</td>
<td>20,098</td>
<td>5,672</td>
<td>9,642</td>
<td>1,602</td>
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<tr>
<td>Vertical %</td>
<td>35.5%</td>
<td>42.9%</td>
<td>39.6%</td>
<td>44.7%</td>
<td>38.4%</td>
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<tr>
<td>Horizontal %</td>
<td>100.0%</td>
<td>24.4%</td>
<td>6.9%</td>
<td>11.7%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Index</td>
<td>100</td>
<td>121</td>
<td>73</td>
<td>136</td>
<td>142</td>
</tr>
<tr>
<td>AGE: 55+</td>
<td>9,904</td>
<td>1,219</td>
<td>663</td>
<td>466</td>
<td>125</td>
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<tr>
<td>Weighted(000)</td>
<td>81,288</td>
<td>11,306</td>
<td>5,571</td>
<td>3,287</td>
<td>828</td>
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<tr>
<td>Vertical %</td>
<td>35.1%</td>
<td>24.2%</td>
<td>38.9%</td>
<td>15.2%</td>
<td>19.9%</td>
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<tr>
<td>Horizontal %</td>
<td>100.0%</td>
<td>13.9%</td>
<td>6.9%</td>
<td>4.0%</td>
<td>1.0%</td>
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<tr>
<td>Index</td>
<td>100</td>
<td>69</td>
<td>111</td>
<td>43</td>
<td>57</td>
</tr>
<tr>
<td>PRESENCE OF CHILDREN BY AGE: 2 - 11 YEARS</td>
<td>5,528</td>
<td>1,110</td>
<td>258</td>
<td>592</td>
<td>96</td>
</tr>
<tr>
<td>Weighted(000)</td>
<td>49,675</td>
<td>11,445</td>
<td>2,942</td>
<td>6,221</td>
<td>862</td>
</tr>
<tr>
<td>Vertical %</td>
<td>21.4%</td>
<td>24.5%</td>
<td>20.5%</td>
<td>28.9%</td>
<td>20.7%</td>
</tr>
<tr>
<td>Horizontal %</td>
<td>100.0%</td>
<td>23.0%</td>
<td>5.9%</td>
<td>12.5%</td>
<td>1.7%</td>
</tr>
<tr>
<td>Index</td>
<td>100</td>
<td>114</td>
<td>96</td>
<td>135</td>
<td>96</td>
</tr>
<tr>
<td>Variable</td>
<td>Chattanooga, TN</td>
<td>Cincinnati, OH</td>
<td>Seattle, WA</td>
<td>USA</td>
<td></td>
</tr>
<tr>
<td>--------------------------------------------------------------------------</td>
<td>-----------------</td>
<td>----------------</td>
<td>-------------</td>
<td>---------</td>
<td></td>
</tr>
<tr>
<td>% Education Attainment, Bachelor's Degree, 2016</td>
<td>16.82%</td>
<td>19.18%</td>
<td>34.47%</td>
<td>18.43%</td>
<td></td>
</tr>
<tr>
<td>% ENTERTAINMENT/LEISURE</td>
<td>SPORTS &amp; FITNESS</td>
<td>SPORTS-PLAYED/PARTICIPATED</td>
<td>LAST 12 MOS</td>
<td>YOGA, 2015</td>
<td>8.71%</td>
</tr>
<tr>
<td>% TRAVEL</td>
<td>VACATION ACTIVITIES</td>
<td>VACATION ACTIVITIES - LIKE TO DO</td>
<td>PLAYING GOLF, 2015</td>
<td></td>
<td>3.80%</td>
</tr>
<tr>
<td>CBP: Travel (HH Avg), 2017</td>
<td>$941.43</td>
<td>$1,004.30</td>
<td>$2,051.72</td>
<td>$1,462.58</td>
<td></td>
</tr>
</tbody>
</table>
Consumer Buying Power for Travel in the U.S.
II. Competitive Market Concentrations and Vitality

- Market Penetration
- Industry Vitality

The Bed-and-breakfast Inns industry captures $15 in sales per personal income earning unit within the market area, representing local demand below US national levels of $19. Local industry sales are about 0.0% of gross personal income, below the US national level of 0.0%. The industry location quotient of 0.97 indicates market area employment concentrations below the industry employment concentration nationally (where the US concentration equals 1.00).

The market area Bed-and-breakfast Inns industry transacts $129 in sales per private sector business establishment, representing local demand below US national levels ($170). Locally generated industry sales represent 3.08% of the total volume of sales generated in the market area by businesses of all types, a 2.99 multiple of the national average share.

Over the 24 month period year-end 2014-2015, 5.9% of US business establishments in the industry, and 6.1% in its small business segment, ceased independent operation.

By contrast, the cessation rate (2014-2015) in the market area was 6.76% industrywide and 6.85% for small businesses. On the new business vitality side of the equation, 3 independent industry startups and new branch operations were identified in the market area, creating a new operation rate of 4.00% in the most recent analysis year, less than the national rate of 5.09%. Unusually low new operation rates can indicate market saturation or lack of perceived opportunity, while high rates suggest both opportunity and the recognition of it. Due to the limited number of new operations at any given time, this indicator is often less useful in small local market areas.
III. Industry Market Size and Projections

- Market Volume
- Small Business Share
- Growth and Projections

In this market area, the Bed-and-breakfast Inns industry includes 75 business operations; 75 independent firms and n/a branch establishments. Among the independent firms, 74 fall within small business parameters defined as single site firms with fewer than 25 employees.

Industry firms based in the market area represent locally generated industry sales of $10,878,736, which excludes operations of branches owned by local firms but situated outside the market area; and conversely, includes branch operations inside the market area, even if owned by firms based elsewhere. The locally generated industry market volume figure is projected from sales per employee data and local employment totals. The generated market volume of the industry's small business segment in the market area is $9,434,656, or 86.7% of the total local market. Nationally, small businesses capture 68.0% of industry market share. For the market-specific focus of this competitive analysis, generated sales is applied as the most useful barometer of industry-wide market area revenue unless otherwise specified.

Average annual (locally generated) site sales are $145,050, including branch operations controlled from outside the market area. Nationally, industry site sales are $255,321 or 176.0% of local levels. Market area small business sales average $127,495, or 28.2% below the national average for small businesses in the industry.

Employment in the Accommodation industry group is projected to grow by 1% per year through 2022. Output is projected to increase by 2.5% per year over the same period. Actual market area growth will be impacted by local conditions including income levels and business-to-business demand. The utility of short-term projections may be adversely affected by unforeseen economic turbulence and volatility.