



Travel Activities and Motivations Survey

US Visitors to Canada

February 2008

Prepared by Lang Research Inc on behalf of:

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

Executive Summary

Over the last two years, 11.2% of adult Americans (24,789,506) took an overnight pleasure trip to Canada. This represents 14.5% of U.S. Pleasure Travelers. Of those who visited Canada, 24.7% reported taking two or more pleasure trips to Canada during the last two years. The majority of U.S. Pleasure Travelers who visited Canada took a trip to Ontario (56.7%). British Columbia (28.3%) was the second most popular Canadian destination followed by Quebec (21.3%) and Nova Scotia (9.2%).

U.S. Pleasure Travelers who visited Canada are most likely to live in the U.S. border-states, including Washington, Vermont, Michigan, Alaska, Maine, North Dakota and New York State. They also over-represented among those living in larger urban centers.

Those who visited Canada tend to be older (59.7% are 45 years of age or older), predominantly married (72.5%) and less likely to have children 18 or younger living at home (76.9%). They are much more likely to have a university education (68.8%) and to report household incomes of \$100,000 or more. Accordingly, U.S. visitors to Canada are over-represented among affluent, mature couples.

U.S. Pleasure Travelers who visited Canada are much more active than the average U.S. Pleasure Traveler in culture and entertainment pursuits while on trips. They are especially likely to have taken part in participatory, educational activities (e.g., aboriginal cultural experiences), to have visited educational attractions (e.g., museums, science and technology exhibits) and to have attended live art performances (e.g., high art performances, live theatre) while on trips. They were also more likely to have taken part in a wine, beer or food tasting, to have gambled in a casino, to have attended a sporting event and to have attended theatre, film or music festivals. Their cultural pursuits reflect their interest in learning experiences, intellectual stimulation, novelty and live entertainment. Visitors to Canada were also very active in outdoor activities while on trips and especially nature-oriented activities (e.g., wildlife viewing), skiing, resort-based, water activities and fitness activities. They are much more likely than the average U.S. Pleasure Traveler to have taken tours and cruises, and especially freshwater and ocean cruises, multi-location, organized tours and tours of wineries, factories and casinos. They prefer vacations in culturally distinctive destinations that provide intellectual stimulation, learning opportunities and novelty.

Those who visited Canada are above-average users of the Internet to plan (77.4%) and booking travel (58.4%). They are also above-average consumers of travel media. They may also be effectively targeted through science, nature and history television programming and magazines, news and current events media, business, finance and investing magazines and classical music and all news / talk / information radio stations.

Travel Activity and Motivation Survey (TAMS)

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

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

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

TAMS was sponsored by the following organizations:

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

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

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

This report profiles those who took a trip to Canada during the past two years and compares them with other U.S. Pleasure Travelers (i.e., took at least one pleasure trip in the last two years). This report is part of a series of eight reports reviewing U.S. travelers to specific destinations within Canada prepared using the U.S. TAMS database.

U.S. Travelers to Canada

Market Incidence

Over the last two years, 11.2% of adult Americans (24,789,506) took an overnight pleasure trip to Canada. This represents 14.5% of U.S. Pleasure Travelers. 24.7% of U.S. Pleasure Travelers who visited Canada reported taking two or more pleasure trips to Canada during the last two years.

Fig. 1 Incidence of Trips¹ to Canada During the Past Two Years

	Canada
Number of Americans Taking a Trip ²	24,789,506
Percent of U.S. Pleasure Travelers ³	14.5%
Percent of U.S. Population ⁴	11.2%
Percent of Canadian Visitors Taking Two or More Pleasure Trips to Canada ⁵	24.7%

- 1 - "Trips" are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.
- 2 - Defined as individuals who took at least one overnight trip to Canada in the last two years for any purpose.
- 3 - "Pleasure Travelers" are defined as individuals who have taken at least one out-of-town pleasure trip of one or more nights in the last two years. This row reports the percent of U.S. Pleasure Travelers who took a trip to Canada.
- 4 - This row reports the percent of the Total U.S. Adult Market who took a trip to Canada during the past two years.
- 5 - This row reports the percent of U.S. Pleasure Travelers who visited Canada who took two or more pleasure trips to Canada during the last two years.

Incidence by Region, State and Population Size

Relative to the average U.S. Pleasure Traveler, those who took a trip to Canada are over-represented among those living in Alaska and the New England, Middle Atlantic, East North Central and Pacific regions of the United States. They are more likely to live in large cities (population of 2 million or more) than in mid-sized cities and smaller communities.

Fig. 2 Geographic Distribution & Population Size of Those Who Took a Trip to Canada

	Total Population	Estimated Number Who Took a Trip to Canada	Percent of Pleasure Travelers in Region Who Took a Trip to Canada	Percent of Total Regional Population Who Took a Trip to Canada
United States	222,846,268	24,789,506	14.5%	11.2%
New England	11,095,629	1,914,013	22.3%	17.5%
Middle Atlantic	31,005,526	4,866,603	21.1%	15.8%
East North Central	34,621,254	5,402,472	20.3%	15.7%
West North Central	15,024,360	1,510,151	12.5%	10.1%
South Atlantic	42,602,998	3,386,580	10.6%	8.0%
East South Central	13,597,436	783,030	8.2%	5.8%
West South Central	24,853,901	1,214,267	6.7%	4.9%
Mountain	15,030,720	1,197,635	9.9%	8.0%
Pacific	34,529,689	4,378,840	15.7%	12.8%
Alaska	484,754	135,915	32.2%	28.2%
Not Available	745,757	165,147	26.6%	22.3%
Less than 100,000	29,429,442	2,277,440	11.0%	7.8%
100,000 to 499,999	36,551,501	3,400,908	12.5%	9.4%
500,000 to 1,999,999	52,335,815	5,456,268	13.7%	10.5%
2,000,000 or more	103,783,753	13,489,743	16.4%	13.1%

Those who visited Canada are most likely to live in a border state across the entire breadth of the country, including Washington State, Vermont, Michigan, Alaska, Maine, North Dakota and New York State. As would be expected, the likelihood of a visit to Canada declines as the distance of the state from Canada increases (see Fig. 3 on next page). Those who visited Canada are least likely to live in southern states of Arkansas, Oklahoma, Mississippi, North Carolina and Alabama.

Fig. 3 Those Who Took a Trip to Canada by U.S. State

Region	State	Population of State	Estimated Number Taking Trip to Canada	Percent of Pleasure Travelers in State	Percent of State Population
United States	All States	222,846,268	24,789,506	14.5%	11.2%
New England	Connecticut	2,685,692	434,331	21.0%	16.5%
	Maine	1,047,770	230,762	31.9%	23.1%
	Massachusetts	4,423,562	772,163	22.0%	17.6%
	New Hampshire	1,604,344	234,716	19.7%	14.7%
	Rhode Island	837,445	107,869	15.5%	12.9%
	Vermont	496,816	134,173	35.1%	27.0%
Middle Atlantic	New Jersey	6,708,501	860,222	16.5%	12.9%
	New York	14,727,054	2,627,771	23.9%	18.0%
	Pennsylvania	9,569,972	1,378,610	20.2%	14.6%
East North Central	Illinois	9,521,097	1,019,151	13.7%	10.8%
	Indiana	4,717,624	458,286	12.8%	9.7%
	Michigan	7,709,890	2,008,116	33.5%	26.2%
	Ohio	8,412,962	1,434,913	23.2%	17.2%
	Wisconsin	4,259,682	482,006	14.0%	11.4%
West North Central	Iowa	2,262,393	202,252	11.3%	9.1%
	Kansas	2,304,474	143,670	8.1%	6.2%
	Minnesota	3,946,220	641,845	19.0%	16.4%
	Missouri	4,138,758	269,328	8.4%	6.5%
	Nebraska	1,304,361	114,310	10.9%	8.8%
	North Dakota	488,140	99,741	24.3%	20.4%
	South Dakota	580,015	39,006	8.7%	7.0%
South Atlantic	Delaware	646,427	105,997	21.7%	16.4%
	District of Columbia	521,285	81,746	23.5%	15.7%
	Florida	13,937,467	1,232,578	11.5%	8.9%
	Georgia	6,668,302	486,867	9.6%	7.3%
	Maryland	3,428,206	324,949	12.2%	9.5%
	North Carolina	6,651,453	330,432	6.7%	5.0%
	South Carolina	3,241,944	174,825	7.4%	5.4%
	Virginia	5,957,159	566,138	12.3%	9.7%
	West Virginia	1,550,755	83,049	9.5%	5.4%
East South Central	Alabama	3,431,591	164,593	6.8%	4.8%
	Kentucky	3,447,277	207,598	8.5%	6.0%
	Mississippi	2,156,793	92,706	6.7%	4.3%
	Tennessee	4,561,775	318,133	9.6%	7.1%
West South Central	Arkansas	2,103,346	64,661	4.5%	3.1%
	Louisiana	3,367,908	164,220	7.3%	5.1%
	Oklahoma	2,643,565	107,698	5.7%	4.1%
	Texas	16,739,082	877,688	7.0%	5.3%
Mountain	Arizona	4,451,660	300,047	8.5%	6.8%
	Colorado	3,501,822	273,798	9.5%	7.8%
	Idaho	1,044,920	87,033	10.6%	8.3%
	Montana	726,027	88,679	14.7%	12.2%
	Nevada	1,809,582	178,449	12.3%	9.9%
	New Mexico	1,433,596	89,511	8.1%	6.2%
	Utah	1,671,322	136,121	9.7%	8.3%
Wyoming	391,790	43,997	13.2%	11.2%	
Pacific	Alaska	484,754	135,915	32.2%	28.2%
	California	26,965,837	2,600,688	11.9%	9.7%
	Oregon	2,793,303	404,586	18.7%	14.6%
	Washington	4,770,549	1,373,566	35.9%	29.1%

Demographic Profile

U.S. Pleasure Travelers who visited Canada tend to be older (59.7% 45 years of age or older) than the average U.S. Pleasure Traveler. They are predominantly married (72.5%) and less likely to have children 18 or younger living at home (76.9%). They are much more likely to have a university education (68.8%) and they are over-represented among U.S. Pleasure Travelers with household incomes of \$100,000 or more. Accordingly, U.S. visitors to Canada are over-represented among affluent, mature couples.

Fig. 4 Demographic Profile of Visitors to Canada Relative to All U.S. Pleasure Travelers

		Took a Trip to Canada	Did Not Take a Trip to Canada ¹	Pleasure Travelers	Index ²
Attribute	Size of Market	24,789,506	145,720,735	170,510,241	100
Gender	Male	52.7%	47.8%	48.5%	109
	Female	47.3%	52.2%	51.5%	92
Age of Respondent	18 to 24	8.4%	11.2%	10.8%	78
	25 to 34	17.3%	21.6%	21.0%	83
	35 to 44	14.6%	17.7%	17.3%	84
	45 to 54	22.0%	20.9%	21.0%	105
	55 to 64	18.6%	14.9%	15.5%	120
	65 Plus	19.1%	13.6%	14.4%	132
Average Age		48.5	44.9	45.4	N/A
Marital Status	Not married	27.5%	31.1%	30.5%	90
	Married	72.5%	68.9%	69.5%	104
Parental Status	No children under 18	76.9%	68.8%	70.0%	110
	Children under 18	23.1%	31.2%	30.0%	77
Education	High school or less	13.8%	21.6%	20.5%	67
	Trade, Technical, Community Col.	17.5%	22.0%	21.4%	82
	University Degree	42.2%	40.9%	41.1%	103
	Post Graduate Degree	26.6%	15.5%	17.1%	156
Household Income	Under \$20,000	5.1%	8.6%	8.1%	63
	\$20,000 to \$39,999	10.8%	17.2%	16.2%	67
	\$40,000 to \$59,999	14.7%	17.0%	16.7%	88
	\$60,000 to \$79,999	15.0%	14.6%	14.7%	102
	\$80,000 to \$99,999	13.1%	11.3%	11.6%	113
	\$100,000 to \$149,999	18.3%	13.7%	14.4%	127
	\$150,000 or more	11.5%	5.9%	6.7%	173
Not stated		11.5%	11.7%	11.7%	99
Average Household Income		\$89,289	\$71,749	\$74,303	N/A

1 - "Did Not Take a Trip to Canada" is defined as an individual who took at least one out-of-town, overnight pleasure trip of one or more nights in the last two years but did not go to Canada on any trip.

2 - The "Index" is calculated by dividing the percent for those who visited Canada in each group by the percent of U.S. Pleasure Travelers in each group. The Index indicates the extent to which visitors are over or under-represented relative to the average U.S. Pleasure Traveler. An index of 100 means the percent of visitors is the same as that of the average U.S. Pleasure Traveler. Index values over 100 indicate that visitors are over-represented and index values less than 100 indicate that visitors are under-represented relative to the average U.S. Pleasure Traveler.

Travel Activity (During Last Two Years)

Those who visited Canada during the last two years are frequent travelers with 59.1% taking five or more pleasure trips in the last two years. (Note: 42.4% of U.S. Pleasure Travelers overall took five or more pleasure trips in the last two years). As such, they were more likely than the average U.S. Pleasure Traveler to have taken trips within their home state and to have traveled to other parts of the United States. They were particularly more likely to have taken a trip to Mexico, the Caribbean and overseas destinations.

The majority of U.S. Pleasure Travelers who visited Canada took a trip to Ontario (56.7%). British Columbia (28.3%) was the second most popular Canadian destination followed by Quebec (21.3%) and Nova Scotia (9.2%).

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

	Took a Trip to Canada	Did Not Take a Trip to Canada	Pleasure Travelers	Index
Size of Market	24,789,506	145,720,735	170,510,241	100
All destinations	100.0%	82.9%	85.4%	117
Canada	100.0%	0.0%	14.6%	N/A
Newfoundland & Labrador	2.9%	0.0%	0.4%	N/A
Prince Edward Island	4.2%	0.0%	0.6%	N/A
New Brunswick	5.6%	0.0%	0.8%	N/A
Nova Scotia	9.2%	0.0%	1.3%	N/A
Quebec	21.3%	0.0%	3.1%	N/A
Ontario	56.7%	0.0%	8.3%	N/A
Manitoba	3.6%	0.0%	0.5%	N/A
Saskatchewan	3.3%	0.0%	0.5%	N/A
Alberta	8.2%	0.0%	1.2%	N/A
British Columbia	28.3%	0.0%	4.1%	N/A
Yukon	3.9%	0.0%	0.6%	N/A
Northwest Territories	2.7%	0.0%	0.4%	N/A
Nunavut	0.3%	0.0%	LT 0.1%	N/A
Own State	83.9%	79.0%	79.7%	105
Other parts of the U.S.	96.5%	89.6%	90.6%	106
Mexico	22.0%	12.1%	13.6%	162
Caribbean	22.3%	11.1%	12.7%	175
All other destinations	17.1%	8.3%	9.6%	179

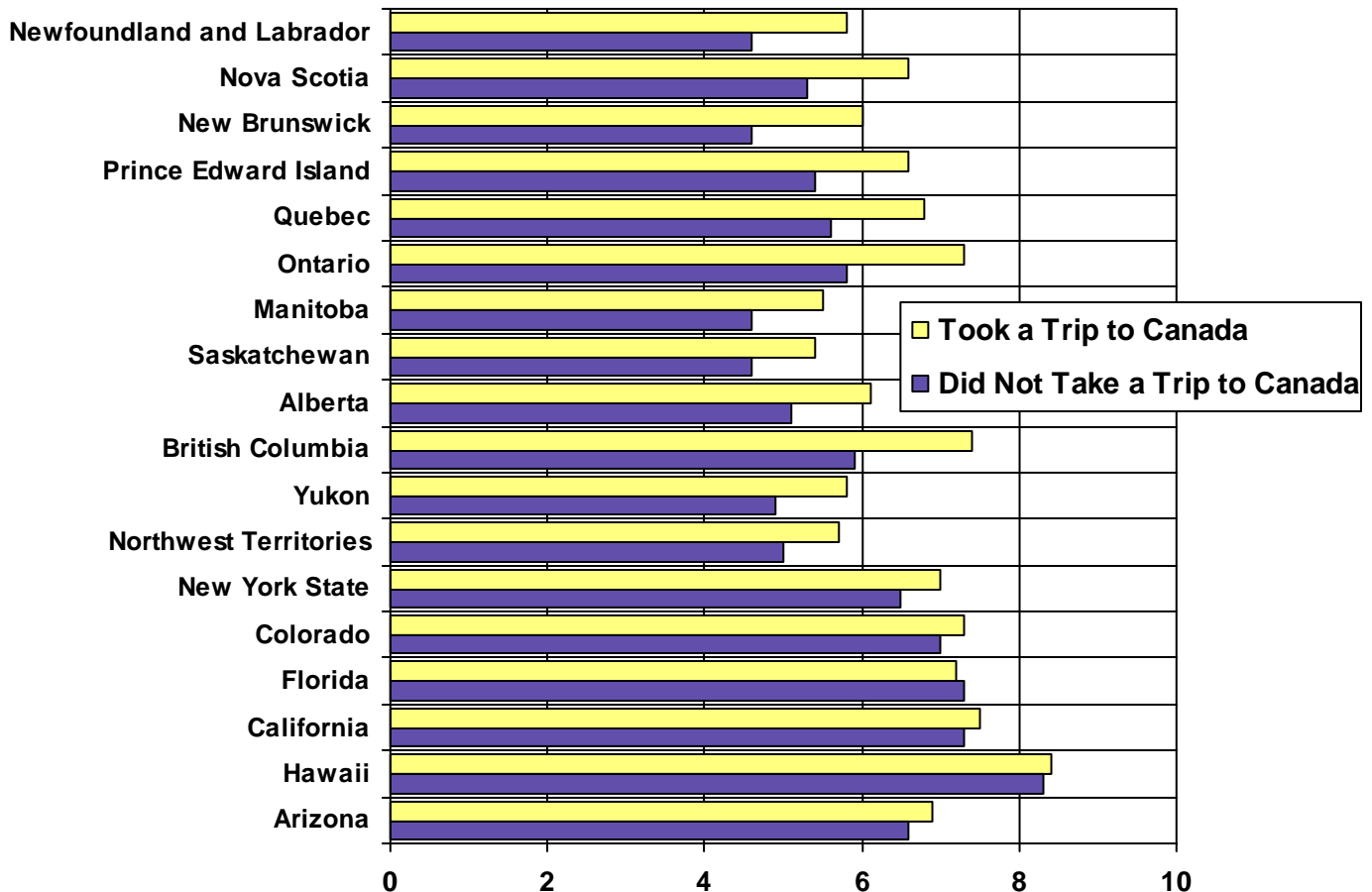
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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

Those who visited Canada have a much more favourable impression of all Canadian destinations than does the average U.S. Traveler. British Columbia (7.4) was perceived as the most appealing Canadian destination followed by Ontario (7.3), Quebec (6.8), Prince Edward Island (6.6) and Nova Scotia (6.6).

By contrast, with the exception of a more favourable impression of New York State, the U.S. reference states were perceived to be as appealing among those who visited Canada as they were to those who did not visit Canada.

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



Culture and Entertainment Activities Pursued While on Trips

U.S. Pleasure Travelers who visited Canada are more active than the average U.S. Pleasure Traveler in culture and entertainment pursuits while on trips. They most frequently went shopping and dining, visited historical sites, museums and art galleries, and went to casinos, live theatre and comedy clubs while on trips. However, relative to the average U.S. Pleasure Traveler, they were more likely to have taken part in participatory, educational activities (e.g., aboriginal cultural experiences, participatory historical activities, archaeological digs, agro-tourism) to have visited educational attractions (e.g., science and technology exhibits) and to have attended live art performances (e.g., high art performances) as well as theatre, film and music festivals while on trips. They were also more likely to have taken part in a wine, beer or food tasting, to have gambled in a casino and to have attended a sporting event (e.g., professional sports, national or international sporting event). Their cultural pursuits reflect the fact that this affluent travel segment is interested in learning experiences, intellectual stimulation, novelty and live entertainment.

Fig. 7 Culture and Entertainment Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Culture & Entertainment Activity)

	Took a Trip to Canada	Did Not Take a Trip to Canada	Pleasure Travelers	Index
Size of Market	24,789,506	145,720,735	170,510,241	100
Shopping and Dining	85.5%	76.4%	77.7%	110
Historical Sites, Museums & Art Galleries	72.4%	50.2%	53.5%	135
Casino, Theatre and Comedy Clubs	61.3%	42.7%	45.4%	135
Theme Parks & Exhibits	56.2%	47.7%	49.0%	115
Fairs and Festivals	54.3%	38.7%	41.0%	133
Fine Dining and Spas	45.9%	30.7%	33.0%	139
Wine, Beer and Food Tastings	39.6%	20.1%	22.9%	173
Science and Technology Exhibits	37.9%	22.6%	24.8%	153
Garden Theme Attractions	26.8%	11.4%	13.7%	196
Professional Sporting Events	24.9%	14.6%	16.1%	155
Equestrian & Western Events	21.9%	14.4%	15.5%	142
Rock Concerts and Recreational Dancing	20.7%	14.3%	15.3%	136
Agro-Tourism	20.7%	12.3%	13.5%	153
High Art Performances	20.5%	9.3%	10.9%	187
Aboriginal Cultural Experiences	16.6%	7.2%	8.6%	193
Theatre, Film & Musical Festivals	14.3%	7.3%	8.3%	172
Amateur Tournaments	11.1%	7.1%	7.7%	145
Archaeological Digs & Sites	10.5%	4.7%	5.5%	190
Participatory Historical Activities	8.8%	3.1%	3.9%	225
National & International Sporting Events	3.9%	1.5%	1.9%	208

Culture and Entertainment Activities Pursued While Not on Trips

U.S. Pleasure Travelers who visited Canada are also active in culture and entertainment pursuits while NOT traveling. They frequently dine in local restaurants, attend local festivals or fairs and visit local historic sites or heritage buildings. Relative to the average U.S. Pleasure Traveler, they are especially likely to patronize their local performing arts (e.g., attend live theatre, opera, ballet, classical music concerts) and to visit educational attractions (e.g., art galleries, art shows, museums, historical buildings, botanical gardens). This reflects a keen interest in learning within this segment.

Fig. 8 Culture and Entertainment Activities Pursued While Not on Trips

	Took a Trip to Canada	Did Not Take a Trip to Canada	Pleasure Travelers	Index
Size of Market	24,789,506	145,720,735	170,510,241	100
Going out to eat in restaurants	94.8%	92.5%	92.8%	102
Going to festivals or fairs	70.9%	64.5%	65.5%	108
Going to historic sites or heritage buildings	51.1%	38.3%	40.1%	127
Going to museums	49.2%	35.5%	37.5%	131
Going to zoos or aquariums	48.3%	45.2%	45.6%	106
Going to amateur sporting events	44.5%	39.1%	39.9%	112
Going to professional sporting events	42.0%	33.7%	34.9%	120
Going to live theatre	41.9%	27.0%	29.2%	144
Going to art galleries or art shows	39.9%	25.7%	27.8%	144
Going to amusement or theme parks	37.0%	38.3%	38.1%	97
Going to pick-your-own farms or farmers' market	36.4%	30.8%	31.6%	115
Going to gamble in casinos	33.6%	27.0%	28.0%	120
Going to botanical gardens	28.3%	18.6%	20.0%	142
Going to bars with live pop or rock bands	25.4%	23.2%	23.6%	108
Going to classical music concerts	23.6%	13.4%	14.9%	159
Going dancing	23.6%	20.4%	20.8%	113
Going to rock music concerts	23.3%	21.0%	21.3%	109
Staying overnight in a hotel or B&B in your own city	13.0%	10.1%	10.6%	123
Going to day spas	13.0%	9.8%	10.3%	126
Going to jazz clubs	11.3%	7.3%	7.9%	143
Going to the ballet	11.2%	6.3%	7.0%	159
Going to the opera	10.4%	5.0%	5.7%	181
Going to rodeos	8.0%	8.2%	8.2%	98

Outdoor Activities Pursued While on Trips

Those who visited Canada were also very active in outdoor activities while on trips. They were especially likely to participate in nature-oriented activities (e.g., wildlife viewing, hiking, climbing and paddling, fishing). Relative to the average U.S. Pleasure Traveler, visitors to Canada were also more likely to go skiing (e.g., cross-country skiing, downhill skiing), participate in resort-based, water activities (sailing and surfing, scuba diving and snorkeling) and to take part in fitness activities (e.g., cycling, exercise and jogging) while on trips during the past two years.

Fig. 9 Outdoor Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Outdoor Activity)

	Took a Trip to Canada	Did Not Take a Trip to Canada	Pleasure Travelers	Index
Size of Market	24,789,506	145,720,735	170,510,241	100
Wildlife Viewing	51.2%	32.1%	34.9%	147
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	47.2%	38.3%	39.6%	119
Hiking, Climbing & Paddling	34.7%	21.6%	23.5%	148
Boating & Swimming (e.g., motorboating, swimming in lakes)	28.4%	19.8%	21.0%	135
Games & Individual Sports (e.g., tennis, board games)	26.9%	21.4%	22.2%	121
Fishing	23.2%	18.1%	18.8%	123
Exercising & Jogging	21.6%	12.8%	14.1%	154
Golfing	16.2%	9.7%	10.7%	152
Downhill Skiing & Snowboarding	13.7%	7.1%	8.0%	171
Cycling	11.3%	5.5%	6.3%	179
Team Sports (e.g., football, baseball, basketball)	10.2%	7.5%	7.9%	129
Horseback Riding	9.9%	5.5%	6.2%	161
Snowmobiling & ATVing	9.9%	6.7%	7.1%	139
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	8.4%	4.1%	4.8%	177
Board & Blade (e.g., skateboarding, ice-skating)	7.3%	3.5%	4.0%	182
Hunting	7.0%	5.1%	5.4%	131
Scuba & Snorkeling	6.5%	3.7%	4.1%	160
Cross-country Skiing & Snowshoeing	4.9%	1.4%	1.9%	259
Extreme Air Sports (e.g., parachuting, bungee jumping)	3.8%	1.4%	1.7%	222
Motorcycling	3.7%	2.9%	3.1%	121
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	0.9%	0.2%	0.3%	259

Outdoor Activities Pursued While Not on Trips

When NOT traveling, those who visited Canada are somewhat more likely to participate in outdoor activities than the average U.S. Pleasure Traveler. The majority of those who visited Canada go on day outings to local parks and picnic, exercise, swim and garden while not traveling. However, reflecting the concentration of Canadian Visitors in the northern U.S. border states, visitors to Canada are especially likely to go skiing (e.g., cross-country skiing, downhill skiing) and participate in other winter activities (e.g., ice-skating, snowmobiling, snowboarding). They are also more likely than other U.S. Pleasure Travelers to participate in nature-oriented activities (canoeing and kayaking, hiking, horseback riding), fitness activities (jogging, exercising) and to play golf and racquet sports (tennis). This suggests that visitors to Canada are a mature segment that is very active and fitness-oriented.

Fig. 10 Outdoor Activities Pursued While NOT on Trips

	Took a Trip to Canada	Did Not Take a Trip to Canada	Pleasure Travelers	Index
Size of Market	24,789,506	145,720,735	170,510,241	100
Day outing to a park	64.5%	62.9%	63.1%	102
Exercising at home or at a fitness club	61.5%	55.1%	56.0%	110
Swimming	59.1%	56.1%	56.5%	104
Gardening	57.6%	52.3%	53.1%	108
Picnicking	51.1%	47.2%	47.7%	107
Hiking	41.3%	31.0%	32.5%	127
Fishing	30.9%	33.1%	32.8%	94
Cycling	29.5%	21.7%	22.9%	129
Camping	28.8%	26.3%	26.7%	108
Sailing or other boating	25.0%	19.1%	20.0%	125
Golfing	23.2%	17.5%	18.3%	127
Jogging	21.7%	19.1%	19.5%	111
Playing team sports	17.1%	15.6%	15.8%	108
Playing racquet sports (e.g., tennis or badminton)	15.4%	12.8%	13.2%	116
Hunting	12.3%	11.7%	11.8%	104
Canoeing or kayaking	12.1%	7.1%	7.8%	154
Riding an all-terrain vehicle (ATV)	10.7%	11.6%	11.5%	94
Downhill skiing	10.6%	4.9%	5.7%	185
Horseback riding	9.4%	8.5%	8.6%	109
Ice-skating	8.2%	5.0%	5.5%	149
Rollerblading	7.9%	7.2%	7.3%	108
Cross-country skiing	5.6%	2.0%	2.5%	222
Snowmobiling	5.1%	3.0%	3.3%	154
Snowboarding	3.9%	2.5%	2.7%	145
Skateboarding	2.4%	2.2%	2.2%	108

Accommodation Stayed In While on Trips

Visitors to Canada most often stayed in resorts (e.g., seaside resort, lakeside or riverside resort, ski or mountain resort) in the last two years. They also frequently stayed in public or private campgrounds. However, relative to the average U.S. Pleasure Traveler, visitors to Canada were especially likely to have stayed in lakeside or riverside resorts, ski or mountain resorts, wilderness areas (e.g., wilderness lodge you can drive to by car, remote wilderness lodges or outposts) and in accommodation that specializes in fine cuisine (e.g., country inn or resort with gourmet restaurant, cooking school, wine tasting school).

Fig. 11 Accommodation Stayed In While on Trips

	Took a Trip to Canada	Did Not Take a Trip to Canada	Pleasure Travelers	Index
Size of Market	24,789,506	145,720,735	170,510,241	100
Seaside Resort	25.9%	17.0%	18.3%	141
Lakeside / Riverside Resort	22.4%	10.8%	12.4%	180
A Public Campground in a National, State, Provincial or Municipal Park	21.3%	16.2%	16.9%	126
Ski Resort or Mountain Resort	15.8%	7.8%	9.0%	177
A Private Campground	13.7%	9.6%	10.2%	135
Wilderness Lodge You Can Drive to by Car	6.9%	2.9%	3.5%	199
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	6.7%	3.8%	4.2%	159
A Camp Site in a Wilderness Setting (Not a Campground)	6.4%	4.4%	4.7%	137
Health Spa	5.5%	2.7%	3.1%	174
Country Inn or Resort with Gourmet Restaurant	3.9%	1.7%	2.0%	196
Farm or Guest Ranch	3.2%	1.8%	2.0%	159
Remote or Fly-In Wilderness Lodge	2.9%	0.5%	0.8%	347
On a Houseboat	2.5%	1.2%	1.4%	174
Remote or Fly-In Wilderness Outpost	1.7%	0.2%	0.4%	389
Cooking School	1.4%	0.4%	0.6%	244
Wine Tasting School	1.1%	0.3%	0.4%	264

Tours and Cruises Taken During Past Two Years

Those who visited Canada were much more likely than the average U.S. Pleasure Traveler to have taken tours and cruises during the last two years. Sameday tours (both guided and self-guided), city tours, scenic drives in the countryside and a self-guided overnight tour were the most popular tours taken by those who visited Canada in the last two years. However, relative to the average U.S. Pleasure Traveler, Canadian visitors were especially like to have taken cruises in the past two years, including both freshwater cruises (e.g., St. Lawrence River cruise) and ocean cruises (e.g., Alaskan cruise). They were also more likely to have taken multi-location, organized tours and tours of wineries, factories and casinos. This pattern suggests that tours and ocean cruises may be an effective marketing strategy by which to promote Canada to U.S. Pleasure Travelers.

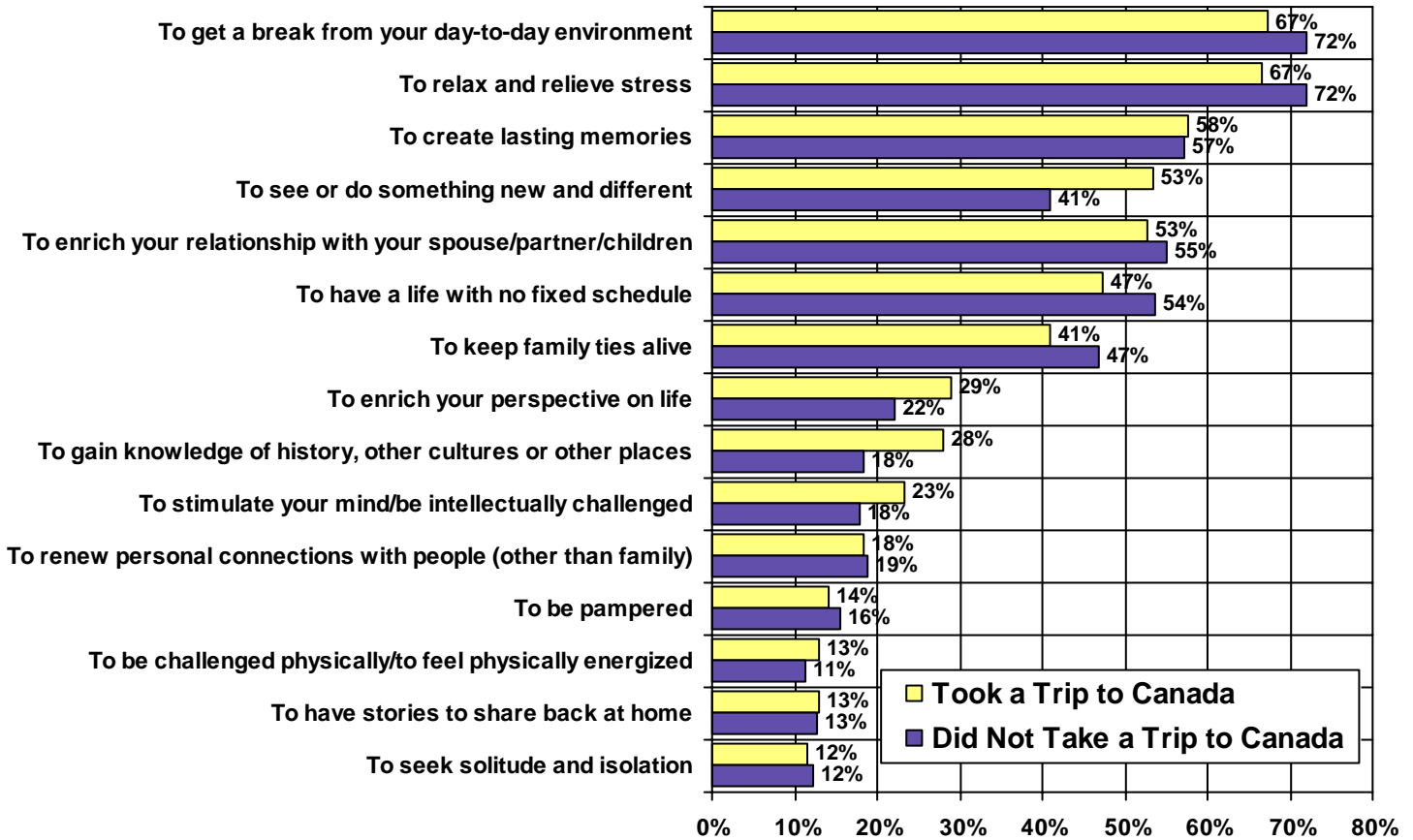
Fig. 12 Tours and Cruises Taken During Past Two Years

	Took a Trip to Canada	Did Not Take a Trip to Canada	Pleasure Travelers	Index
Size of Market	24,789,506	145,720,735	170,510,241	100
An organized, sameday, guided tour while on an overnight trip	31.1%	16.4%	18.5%	168
A self-guided, sameday tour while on an overnight trip	29.5%	17.5%	19.2%	153
Around the city	28.2%	13.6%	15.8%	179
Around the country side - scenic drives	23.8%	11.3%	13.1%	182
A self-guided, overnight tour where you stayed in different locations	19.1%	8.9%	10.4%	184
An organized, overnight, guided tour where you stayed in different locations	18.5%	6.1%	7.9%	235
On the water (sightseeing cruise)	16.5%	6.3%	7.8%	213
Caribbean ocean cruise	15.3%	7.9%	9.0%	170
Wilderness tour	13.7%	6.4%	7.4%	184
An organized, overnight, guided tour where you stayed in a single location	13.1%	5.6%	6.7%	195
Some other type of tour	12.7%	8.2%	8.8%	144
Alaskan ocean cruise	11.1%	1.0%	2.5%	444
Ocean cruise - Other	10.6%	3.8%	4.8%	221
To a casino	9.7%	4.1%	4.9%	197
To a winery	8.5%	2.7%	3.6%	238
Cruise on another lake or river	4.7%	1.5%	2.0%	237
To a factory	4.2%	1.4%	1.8%	228
Some other type of cruise	4.1%	1.3%	1.7%	237
In the air as a pilot or passenger of an airplane or helicopter	4.0%	1.0%	1.4%	286
Cruise on the St. Lawrence River	1.7%	0.0%	0.3%	591
Great Lakes cruise	1.3%	0.2%	0.4%	325
Submarine cruise	0.7%	0.2%	0.2%	291

Benefits Sought While on Vacation

The majority of U.S. Pleasure Travelers take vacations in order to get a break from their daily environment, relax and relieve stress and create lasting memories. However, those who visited Canada are especially likely to pursue vacations that provide intellectual stimulation, opportunities to learn and novelty (i.e., to see and do something new). On the other hand, U.S. travelers to Canada are less likely to take vacations to live without a fixed schedule and keep family ties alive. This suggests that tourism agencies should emphasize Canada’s distinctive culture and opportunities for learning and personal enrichment when promoting Canada to the American pleasure travel market.

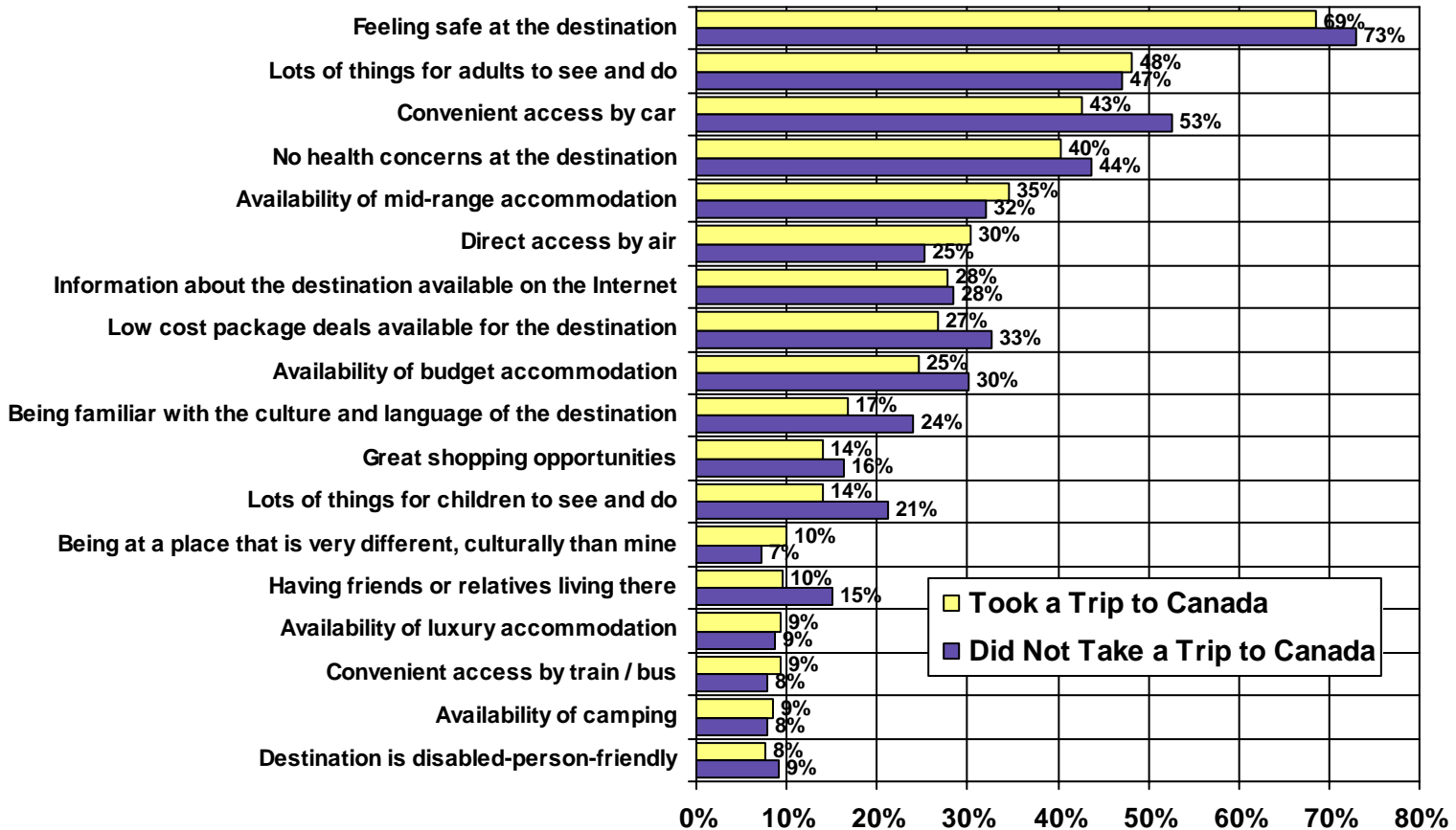
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most U.S. Pleasure Travelers, those who visited Canada consider it important that they feel safe at a destination. However, relative to other U.S. Pleasure Travelers, visitors to Canada are especially attracted to destinations that are culturally distinctive, have lots to see and do for adults, have luxury and mid-priced accommodation as well as camping and that are conveniently accessible by air, bus or train. On the other hand, reflecting their age and affluence, they are less concerned than others whether a destination is conveniently accessible by car, has family and friends living nearby and offers lots of activities for children to see and do. They are also less concerned than others whether a destination has budget accommodation, discount vacation packages available and great shopping opportunities.

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



How Destinations Are Selected

Similar to the average U.S. Pleasure Traveler, most of those who visited Canada in the past two years start planning vacations with a particular destination in mind. However, those who visited Canada are slightly more likely than the average U.S. Pleasure Traveler to first consider what activities they want to do when planning a vacation.

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

	Took a Trip to Canada	Did Not Take a Trip to Canada	Pleasure Travelers	Index
Size of Market	24,789,506	145,720,735	170,510,241	100
Summer				
Started with a desired destination in mind	60.9%	57.7%	58.2%	105
Started by considering specific activities wanted to do	11.1%	9.7%	9.9%	112
Started with a certain type of vacation experience in mind	16.8%	17.4%	17.3%	97
Looked for packaged deals - no destination in mind	1.6%	1.0%	1.1%	144
Considered something else first	3.6%	4.8%	4.6%	78
Don't know / Other	6.0%	9.4%	8.9%	67
Winter				
Started with a desired destination in mind	61.1%	58.5%	58.9%	104
Started by considering specific activities wanted to do	13.6%	10.8%	11.3%	121
Started with a certain type of vacation experience in mind	14.3%	14.9%	14.8%	97
Looked for packaged deals - no destination in mind	2.1%	1.3%	1.4%	147
Considered something else first	3.8%	5.7%	5.3%	71
Don't know / Other	5.1%	8.9%	8.3%	61

Trip Planning and Information Sources Consulted

Similar to the average U.S. Pleasure Traveler, most of those who took a trip to Canada in the past two years were responsible for planning their trips either on their own (41.1%) or with someone else (18.2%). When making vacation plans, they tend to consult a wider variety of information sources than the average U.S. Pleasure Traveler. The majority use Internet websites, past experience and the advice of others to plan their travel. However, relative to the typical U.S. Pleasure Traveler, visitors to Canada are especially likely to obtain travel information from travel guide books, travel agents, official government travel information sources (e.g., brochures or guides, visitor centres), newspaper or magazine articles, television programs and trade, travel or sports shows.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Took a Trip to Canada	Did Not Take a Trip to Canada	Pleasure Travelers	Index
Size of Market		24,789,506	145,720,735	170,510,241	100
Who Plans Trips?	Respondent plans trips	41.1%	38.8%	39.2%	105
	Trip planning a shared responsibility	18.2%	17.5%	17.6%	104
	Someone else plans trips	40.7%	43.7%	43.2%	94
Information Sources Consulted	An Internet website	82.2%	74.9%	76.0%	108
	Past experience / Been there before	58.3%	53.8%	54.5%	107
	Advice of others / Word-of-mouth	51.3%	44.3%	45.4%	113
	Maps	43.7%	30.7%	32.7%	134
	An auto club such as AAA	36.2%	21.8%	24.0%	151
	Official travel guides or brochures from state / province	33.8%	18.2%	20.6%	164
	A travel agent	30.4%	16.5%	18.6%	163
	Articles in newspapers / magazines	28.7%	16.2%	18.1%	158
	Visitor information centres	28.3%	19.0%	20.4%	139
	Travel information received in the mail	24.7%	14.2%	15.8%	156
	Travel guide books such as Fodor's	22.7%	10.1%	12.0%	189
	Advertisements in newspapers / magazines	16.4%	9.9%	10.9%	151
	Programs on television	12.5%	6.2%	7.1%	176
	An electronic newsletter or magazine received by e-mail	9.5%	5.4%	6.0%	157
	Advertisements on television	5.5%	3.7%	4.0%	138
	Visits to trade, travel or sports shows	4.6%	2.0%	2.4%	189

Use of the Internet to Plan and Arrange Trips

Those who took a trip to Canada are more likely than the average U.S. Pleasure Traveler to use the Internet to research (77.4%) and book travel (58.4%). The majority of Internet users consult travel planning or booking websites (e.g., Expedia), hotel or resort websites and airline websites. However, they are more likely than the average U.S. Pleasure Traveler to visit the websites of cruise lines or motorcoach lines. As with the typical U.S. Pleasure Traveler, those who visited Canada most often use the Internet to purchase airline tickets and accommodation. However, those who visited Canada are particularly likely to use the Internet to arrange for car rentals, purchase travel packages and buy tickets for travel by rail, bus or boat / ship.

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

		Took a Trip to Canada	Did Not Take a Trip to Canada	Pleasure Travelers	Index
Size of Market		24,789,506	145,720,735	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	22.6%	32.4%	31.0%	73
	Uses Internet to plan trips only	19.0%	20.3%	20.1%	94
	Uses Internet to book part of trip	58.4%	47.3%	48.9%	119
Types of Websites Consulted	A travel planning / booking website	64.3%	53.9%	55.6%	116
	A website of a hotel or resort	59.5%	52.1%	53.3%	112
	An airline website	56.9%	43.3%	45.6%	125
	A tourism website of a country / region / city	46.3%	32.9%	35.1%	132
	A website of an attraction	37.5%	32.5%	33.4%	113
	Some other website	27.8%	24.5%	25.1%	111
	A cruise line website	22.4%	10.5%	12.4%	180
	A motorcoach website	2.2%	1.2%	1.3%	162
Parts of Trips Booked Over The Internet	Air tickets	79.0%	68.8%	70.6%	112
	Accommodation	76.8%	70.8%	71.9%	107
	Car rental	49.7%	35.5%	38.0%	131
	Tickets or fees for specific activities or attractions	31.2%	25.3%	26.3%	119
	A package containing two or more items	23.6%	16.6%	17.8%	133
	Tickets for rail, bus or boat / ship fares	19.3%	10.3%	11.9%	163
	Other	3.6%	2.8%	2.9%	123

Media Consumption Habits

U.S. Pleasure Travelers who visited Canada are above-average consumers of travel media (e.g., travel sections of newspapers, travel magazines, travel programs on television, travel websites). They may also be effectively reached through science, nature and history programs and magazines (e.g., science & geography magazines, science & nature television, history programs, biography television). They may also be effectively targeted through news and current events programming (e.g., newspapers, newspaper & network news websites, television news, news / talk / information radio, newsmagazines), business, finance and investing magazines and classical music and jazz / big band radio stations.

Fig. 18 Media Consumption Habits

		Took a Trip to Canada	Did Not Take a Trip to Canada	Pleasure Travelers	Index
Size of Market		24,789,506	145,720,735	170,510,241	100
Newspaper Readership	Reads daily newspaper	67.5%	58.6%	59.9%	113
	Reads weekend edition of newspaper	61.5%	54.5%	55.5%	111
	Reads local neighbourhood or community newspapers	54.8%	48.7%	49.5%	111
	Reads other types of newspapers	17.7%	13.2%	13.9%	128
	Frequently or occasionally reads travel section of daily newspaper	56.1%	40.7%	43.0%	131
	Frequently or occasionally reads travel section of weekend newspaper	63.4%	46.9%	49.3%	129
Types of Magazines Read (Top 5 Indexed)	Travel (e.g., Conde Nast)	20.3%	9.0%	10.6%	191
	Magazines about your city	11.0%	6.2%	6.9%	159
	Business, finance and investing	21.3%	12.7%	14.0%	153
	Science and geography	20.1%	13.0%	14.0%	143
	News magazine	28.6%	19.1%	20.5%	140
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	39.9%	27.1%	28.9%	138
	History	50.3%	44.1%	45.0%	112
	Science & nature shows	40.5%	36.1%	36.8%	110
	Biography	36.1%	32.3%	32.9%	110
	News / current affairs	62.4%	57.2%	58.0%	108
Type of Radio Programs Listened To (Top 5 Indexed)	Classical music	20.2%	13.1%	14.1%	143
	Jazz / Big band	13.4%	9.4%	10.0%	134
	News / Talk / Information	41.9%	30.8%	32.4%	129
	All sports	14.6%	11.5%	11.9%	123
	Multicultural	5.6%	4.6%	4.7%	117
Types of Websites Visited (Top 5 Indexed)	Travel	60.7%	45.8%	48.0%	127
	Network news sites (e.g., CNN)	43.8%	37.8%	38.7%	113
	Newspaper sites	33.0%	29.0%	29.6%	111
	Sports	32.3%	29.5%	30.0%	108
	Weather	62.6%	57.8%	58.5%	107

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

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

Appendix Two: U.S. TAMS 2006 Outdoor Activity Segmentation

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