

CANADIAN TRAVEL MARKET

Out-of-Country Travel by Canadians

A Profile Report

January 24, 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, 53.0% (13,139,283) of adult Canadians took an out-of-country, overnight trip (for any purpose). 90.4% (11,872,817) of those who took a trip outside of Canada report that they took at least one out-of-country, pleasure trip during the past two years. Those from Ontario and British Columbia were the most likely to have taken a pleasure trip outside of Canada while those from the Atlantic Region and Saskatchewan were the least likely to have traveled to other countries during the last two years. 91.9% of those who took a trip outside-of-the-country also took a trip within Canada during the last two years. 82.8% took a trip within their own province, 50.4% took a trip to an adjacent province and 34.3% took a trip to a non-adjacent province. Out-of-country travelers were actually more likely to have traveled to other provinces than those who only traveled in Canada during the last two years. In terms of out-of-country travel, Canadians primarily took trips to the United States (50.7%). 12.4% took a trip to Mexico, 15.6% traveled to the Caribbean and 20.6% took a trip to an overseas destination.

Canadians who took a pleasure trip outside of Canada are more likely to have a university degree (37.1%) than those who only traveled within Canada (19.2%) and report higher average household incomes (\$79,516 vs. \$60,535). Out-of-country travelers are somewhat over-represented among affluent, young couples and mature couples and somewhat under-represented among young families with children under 12.

Canadians who traveled outside of Canada are much more likely to participate in culture and entertainment pursuits while on trips than those who only took trips within Canada. They were especially likely to have attended live art performances and to have visited educational attractions (e.g., historical sites, museums and art galleries) while on trips. Out-of-Country Travelers were also more active in outdoor activities and especially warm-weather, resort-based activities (e.g., sailing and surfing, sun bathing), more strenuous activities (e.g., downhill skiing, exercising & jogging) and golfing. By contrast, those who only took pleasure trips within Canada were more likely to go hunting, fishing, snowmobiling and ATVing while on trips. Those who took trips outside of Canada prefer destinations that have a distinctive culture and provide intellectual stimulation and novelty. Those who only traveled within Canada prefer vacations that have a familiar culture, budget accommodation or camping and lots for children to see and do.

Canadians who traveled to other countries are above-average users of the Internet to plan (69.1%) and book (47.0%) travel and above-average consumers of travel media. Out-of-country travelers may also be effectively reached through city lifestyle magazines, business, finance and investing magazines and news and current events media. Those who only traveled within Canada are more likely to read home-oriented magazines, to watch daytime television and listen to country music radio stations.

Out-of-Country Travel by Canadians

Market Incidence

Over the last two years, 53.0% (13,139,283) of adult Canadians took an out-of-country, overnight trip (for any purpose). 90.4% (11,872,817) of those who took a trip outside of Canada report that they took at least one out-of-country, pleasure trip during the past two years.

Overall, 64.4% of those who took a pleasure trip (i.e., Pleasure Travelers) report taking at least one pleasure trip outside of Canada.

Fig. 1 Incidence of Out-of-Country Trips¹ Taken by Canadians during the Past Two Years

	Canada
Number Taking a Trip Outside of the Country (Any Purpose) ²	13,129,283
Percent of Canadian Population	53.0%
Number Taking a Pleasure Trip Outside of the Country ³	11,872,817
Percent of Canadian Pleasure Travelers ⁴	64.4%

- 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 - This row reports the number of Canadians who took at least one overnight trip outside of the country in the last two years for any purpose.
- 3 - This row reports the number of Canadians who took an out-of-country "pleasure trip" during the past two years.
- 4 - "Pleasure Travelers" are defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years. This row reports the percent of Canadian "Pleasure Travelers" who took an out-of-country pleasure trip in the last two years.

Incidence by Region

Those from Ontario and British Columbia were the most likely to have taken a pleasure trip outside of Canada during the last two years. Those from the Atlantic Region and Saskatchewan were the least likely to have taken a pleasure trip to another country during the last two years.

Fig. 2 Geographic Distribution of Those Who Took a Trip to Outside of Canada

	Population	Estimated Number Who Took a Pleasure Trip Outside of Canada	Percent of Pleasure Travelers Who Took a Pleasure Trip Outside of Canada	Percent of Total Population Who Took a Pleasure Trip Outside of Canada
Canada	24,776,103	11,872,817	64.4%	53.0%
Atlantic Provinces	1,822,494	591,773	46.7%	36.2%
Quebec	5,940,869	2,381,240	56.7%	43.7%
Ontario	9,671,592	5,184,424	72.3%	59.8%
Manitoba	843,107	381,940	64.2%	50.3%
Saskatchewan	706,325	254,663	47.0%	39.8%
Alberta	2,465,540	1,199,852	59.8%	52.5%
British Columbia	3,326,176	1,878,925	70.6%	63.0%

Demographic Profile

Canadians who took a pleasure trip outside of Canada are more likely to have a university degree (37.1%) than those who only traveled within Canada (19.2%) and report higher average household incomes (\$79,516 vs. \$60,535). Out-of-country travelers are somewhat over-represented among affluent Young Couples and affluent Mature Couples and somewhat under-represented among Young Families with children under 12. This may reflect the fact that more affluent households with fewer parental responsibilities are better able to afford and accommodate trips to other countries.

Fig. 3 Demographic Profile of Canadians Who Took a Trip Outside of Canada

Attribute	Size of Market	Took a Pleasure Trip Outside of Canada	Only Took Pleasure Trips Within Canada ¹	Total Pleasure Travelers in Canada	Index ²
		11,872,817	6,566,692	18,439,508	100
Gender	Male	49.1%	48.2%	48.8%	101
	Female	50.9%	51.8%	51.2%	99
Age of Respondent	18 to 24	12.5%	13.3%	12.8%	98
	25 to 34	18.8%	20.1%	19.3%	98
	35 to 44	20.4%	20.8%	20.5%	99
	45 to 54	20.2%	20.5%	20.3%	100
	55 to 64	15.0%	12.7%	14.1%	106
	65 Plus	13.0%	12.7%	12.9%	101
Average Age		44.8	44.0	44.5	N/A
Marital Status	Not married	31.0%	34.4%	32.2%	96
	Married	69.0%	65.6%	67.8%	102
Parental Status	No children under 18	72.4%	68.7%	71.1%	102
	Children under 18	27.6%	31.3%	28.9%	95
Education	High school or less	30.5%	46.5%	36.2%	84
	Some post-secondary	11.2%	11.1%	11.2%	100
	Post-secondary diploma/certificate	21.2%	23.2%	21.9%	97
	University degree	37.1%	19.2%	30.7%	121
Household Income	Under \$20,000	4.0%	8.8%	5.7%	70
	\$20,000 to \$39,999	11.7%	19.4%	14.5%	81
	\$40,000 to \$59,999	14.9%	19.4%	16.5%	90
	\$60,000 to \$79,999	14.9%	15.8%	15.2%	98
	\$80,000 to \$99,999	13.2%	10.4%	12.2%	108
	\$100,000 or more	28.7%	12.2%	22.8%	126
	Not stated	12.5%	13.9%	13.0%	96
Average Household Income		\$79,516	\$60,535	\$72,829	N/A

- 1 - "Only Took Pleasure Trips Within Canada" is defined as individuals who took at least one out-of-town, overnight pleasure trip in the last two years but did not take a trip outside of the country.
- 2 - The "Index" is calculated by dividing the percent for those who took an out-of-country trip by the total percent of pleasure travelers in each group. The Index indicates the extent to which out-of-country travelers are over or under-represented relative to all pleasure travelers in Canada. An index of 100 means the percent of out-of-country travelers is the same as that of the average pleasure traveler. Index values over 100 indicate that out-of-country travelers are over-represented relative to the average pleasure traveler in Canada. Index values less than 100 indicate that out-of-country travelers are under-represented relative to the average pleasure traveler in Canada.

Travel Activity (During Last Two Years)

Those who traveled outside of Canada were more frequent travelers during the last two years with 54.1% taking five or more trips in the last two years. By contrast, only 40.7% of those who only traveled within Canada took 5 or more trips. 91.9% of the out-of-country travelers also took a trip within Canada. 82.8% took a trip within their own province, 50.4% took a trip to an adjacent province and 34.3% took a trip to a non-adjacent province. Those who traveled outside of Canada were actually more likely to have taken trips to other provinces than those who traveled exclusively within Canada.

In terms of out-of-country travel, Canadians primarily took trips to the United States (50.7%). Only 12.4% took a trip to Mexico, 15.6% traveled to the Caribbean and 20.6% took a trip to an overseas destination in the last two years.

Fig. 4 Percent Traveling to Other Destinations during Past Two Years

	Took a Pleasure Trip Outside of Canada	Only Took Pleasure Trips Within Canada	Total Pleasure Travelers in Canada
Size of Market	11,872,817	6,566,692	18,439,508
Canada	91.9%	100.0%	94.8%
Took a trip within own province / region	82.8%	91.4%	85.9%
Took a trip to an adjacent province / region	50.4%	41.2%	47.1%
Took a trip to non-adjacent province / region	34.3%	26.3%	31.4%
Newfoundland and Labrador	3.9%	5.0%	4.3%
Prince Edward Island	7.5%	6.6%	7.2%
New Brunswick	12.5%	10.6%	11.8%
Nova Scotia	12.7%	12.6%	12.7%
Quebec	39.4%	38.1%	38.9%
Ontario	57.7%	45.9%	53.5%
Manitoba	9.7%	8.2%	9.2%
Saskatchewan	11.2%	11.8%	11.4%
Alberta	26.8%	24.1%	25.8%
British Columbia	34.1%	24.4%	30.6%
Yukon	1.1%	0.8%	1.0%
Northwest Territories	0.7%	0.6%	0.7%
Nunavut	0.3%	0.2%	0.3%
United States	78.7%	0.0%	50.7%
Mexico	19.2%	0.0%	12.4%
Caribbean	24.2%	0.0%	15.6%
All other destinations	32.0%	0.0%	20.6%

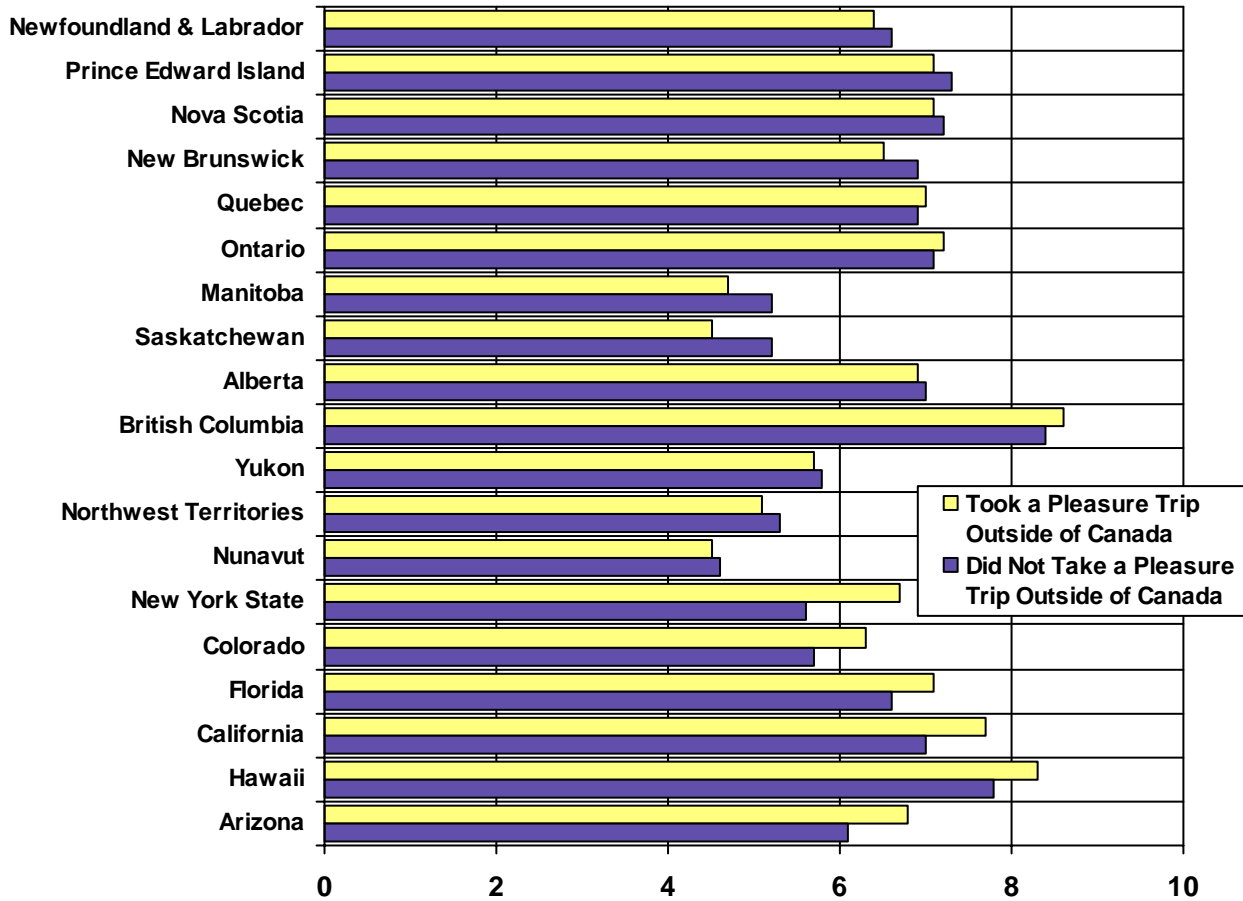
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Canadians who took an out-of-country trip perceive most Canadian destinations to be as appealing as do those who traveled exclusively within the Canada. However, out-of-country travelers have a slightly less favourable impression of New Brunswick, Manitoba and Saskatchewan than those who only traveled within Canada.

As might be expected, those who traveled to other countries rated the six U.S. reference states as more appealing travel destinations than do those who only traveled within Canada. This may partially account for their interest in travel outside of Canada.

Fig. 5 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

Canadians who traveled outside of Canada were much more likely to participate in culture and entertainment pursuits while on trips than those who only took trips within Canada. Out-of-country travelers most often went shopping and dining and visited historical sites, museums and art galleries while on trips. However, relative to those who did not take a trip outside of Canada, out-of-country travelers were much more likely to have attended live art performances (e.g., high art performances, live theatre, musical concerts, comedy festivals and clubs) and professional sporting events. They were also more likely to have visited educational attractions such as historical sites, museums and art galleries, science and technology exhibits and garden-themed attractions while on trips. Out-of-country travelers were also more likely to have taken part in a wine, beer or food tasting, to have gambled in a casino and to have visited a literary or film festival while on a trip during the past two years.

Fig. 6 Culture and Entertainment Activities Pursued While on Trips
(See Appendix One for a Definition of Each Type of Culture & Entertainment Activity)

	Took a Pleasure Trip Outside of Canada	Only Took Pleasure Trips Within Canada	Total Pleasure Travelers in Canada	Index
Size of Market	11,872,817	6,566,692	18,439,508	100
Shopping & Dining	86.7%	76.0%	82.9%	105
Historical Sites, Museums & Art Galleries	64.6%	47.0%	58.3%	111
Theme Parks & Exhibits	42.3%	33.4%	39.2%	108
Fairs & Festivals	40.4%	32.8%	37.7%	107
Musical Concerts, Festivals & Attractions	35.3%	28.1%	32.7%	108
Casinos	30.1%	18.3%	25.9%	116
Wine, Beer & Food Tastings	29.1%	14.2%	23.8%	122
Live Theatre	25.6%	12.9%	21.1%	122
Science & Technology Exhibits	25.4%	19.1%	23.1%	110
Garden Theme Attractions	20.3%	12.7%	17.6%	116
Professional Sporting Events	18.9%	9.8%	15.7%	121
Agro-Tourism	15.9%	15.4%	15.7%	101
High Art Performances	14.1%	5.3%	11.0%	129
Aboriginal Cultural Experiences	13.0%	9.0%	11.6%	112
Amateur Tournaments	12.5%	10.6%	11.8%	106
Spas	12.4%	5.9%	10.0%	123
Comedy Festivals & Clubs	12.0%	6.8%	10.1%	118
Participatory Historical Activities	7.3%	5.6%	6.7%	109
Equestrian & Western Events	7.1%	5.9%	6.7%	106
National & International Sporting Events	3.5%	2.7%	3.2%	109
Literary & Film Festivals	3.3%	1.4%	2.6%	126

Culture and Entertainment Activities Pursued While Not on Trips

Canadians who took an trip to another country during the last two years are also more active in culture and entertainment pursuits while not traveling, They are especially likely to patronize local live art performances (e.g., the opera, ballet, classical music concerts, live theatre, jazz clubs, musical concerts) and to attend professional sporting events. They are also more likely than those who exclusively traveled within Canada to visit local museums, art galleries and art shows and local garden attractions. On the other hand, those who exclusively traveled within Canada are more likely to attend a local rodeo during the last two years. The high level of activity of out-of-country travelers reflects the relative affluence of this travel segment.

Fig. 7 Culture and Entertainment Activities Pursued While Not on Trips

	Took a Pleasure Trip Outside of Canada	Only Took Pleasure Trips Within Canada	Total Pleasure Travelers in Canada	Index
Size of Market	11,872,817	6,566,692	18,439,508	100
Going out to eat in restaurants	93.1%	88.7%	91.5%	102
Going to festivals or fairs	63.0%	58.6%	61.4%	103
Going to amateur sporting events	42.9%	40.4%	42.0%	102
Going to pick-your-own farms or farmers' market	41.3%	40.4%	41.0%	101
Going to historic sites or heritage buildings	40.7%	36.7%	39.3%	104
Going to live theatre	38.8%	27.5%	34.8%	112
Going to museums	36.4%	26.1%	32.7%	111
Going to professional sporting events	36.4%	24.2%	32.1%	114
Going to art galleries or art shows	35.3%	25.4%	31.8%	111
Going to zoos or aquariums	31.1%	29.2%	30.4%	102
Going dancing	30.6%	28.5%	29.9%	103
Going to amusement or theme parks	28.9%	28.7%	28.9%	100
Going to bars with live pop or rock bands	28.4%	26.5%	27.7%	102
Going to botanical gardens	26.7%	23.0%	25.4%	105
Going to rock music concerts	24.1%	19.5%	22.4%	107
Going to gamble in casinos	19.7%	15.3%	18.1%	109
Going to classical music concerts	19.1%	11.9%	16.5%	115
Going to day spas	16.5%	8.8%	13.8%	120
Staying overnight in a hotel or B&B in own city	10.7%	8.4%	9.9%	108
Going to jazz clubs	9.1%	4.7%	7.5%	120
Going to the ballet	8.6%	4.9%	7.3%	118
Going to the opera	8.1%	4.0%	6.6%	122
Going to rodeos	6.4%	9.0%	7.3%	87

Outdoor Activities Pursued While on Trips

Out-of-country travelers were also much more active in outdoor activities while on trips than were those who only traveled within Canada. In relative terms, out-of-country travelers were especially more likely to have taken part in warm-weather, resort-based activities (e.g., swimming in the ocean, sunbathing, sailing and surfing, scuba diving and snorkeling). They were also more likely to have participated in more strenuous outdoor activities (e.g., downhill skiing, snowboarding, exercising and jogging) and to have gone golfing while on trips. By contrast, those who only took pleasure trips within Canada were more likely to go hunting, fishing, snowmobiling and ATVing while on trips. These latter types of activity are often more common in rural areas of the country. This may suggest that those who live in smaller towns or rural areas are less likely to take trips outside of Canada than those who live in larger urban centers.

Fig. 8 Outdoor Activities Pursued While on Trips
(See Appendix Two for a Definition of Each Type of Outdoor Activity)

	Took a Pleasure Trip Outside of Canada	Only Took Pleasure Trips Within Canada	Total Pleasure Travelers in Canada	Index
Size of Market	11,872,817	6,566,692	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	57.4%	32.6%	48.5%	118
Boating & Swimming (e.g., motorboating, swimming in lakes)	42.4%	38.8%	41.1%	103
Wildlife Viewing	41.9%	40.1%	41.2%	101
Hiking, Climbing & Paddling	36.7%	29.4%	34.1%	108
Sports & Games (e.g., tennis, board games)	24.6%	19.3%	22.7%	108
Golfing	22.3%	11.1%	18.3%	122
Fishing	21.3%	27.7%	23.6%	90
Exercising & Jogging	18.9%	10.5%	15.9%	119
Downhill Skiing & Snowboarding	17.8%	8.9%	14.6%	122
Cycling	14.6%	11.6%	13.5%	108
Skating (e.g., ice skating, rollerblading)	12.8%	10.4%	12.0%	107
Team Sports (e.g., hockey, baseball)	12.6%	9.1%	11.4%	111
Snowmobiling & ATVing	10.6%	12.7%	11.3%	94
Cross-country Skiing & Snowshoeing	10.1%	7.9%	9.3%	109
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	8.1%	3.1%	6.3%	128
Horseback Riding	5.6%	3.6%	4.9%	114
Freshwater Scuba & Snorkeling	3.8%	1.6%	3.0%	127
Hunting	3.5%	6.9%	4.7%	74
Motorcycling	3.2%	2.5%	3.0%	108
Wilderness Activities (e.g., wilderness skills course)	2.4%	2.3%	2.4%	101
Extreme Air Sports (e.g., parachuting)	1.3%	0.8%	1.1%	116

Outdoor Activities Pursued While Not on Trips

While NOT traveling, Canadians who traveled outside of the country are more active in more strenuous outdoor activities (e.g., jogging, downhill skiing, rollerblading, skateboarding) and competitive sports (e.g., team sports, racquet sports, golf). On the other hand, those who only took trips within Canada are more likely to participate in nature-oriented activities such as hunting, fishing, camping and horseback riding as well as riding ATV's or snowmobiles while not traveling. Once again, these types of outdoor activity are more common in rural areas of the country.

Fig. 9 Outdoor Activities Pursued While NOT on Trips

	Took a Pleasure Trip Outside of Canada	Only Took Pleasure Trips Within Canada	Total Pleasure Travelers in Canada	Index
Size of Market	11,872,817	6,566,692	18,439,508	100
Day outing to a park	67.2%	66.2%	66.9%	101
Exercising at home or at a fitness club	64.2%	55.2%	61.0%	105
Swimming	61.1%	58.7%	60.3%	101
Gardening	60.3%	58.8%	59.8%	101
Picnicking	51.9%	55.1%	53.1%	98
Hiking	48.9%	48.6%	48.8%	100
Cycling	44.4%	44.1%	44.3%	100
Camping	35.1%	44.9%	38.6%	91
Golfing	32.9%	23.0%	29.4%	112
Ice-skating	28.2%	29.0%	28.5%	99
Jogging	27.0%	18.7%	24.1%	112
Fishing	26.0%	35.2%	29.3%	89
Playing team sports	24.5%	20.2%	22.9%	107
Sailing or other boating	24.1%	22.3%	23.4%	103
Playing racquet sports (e.g., tennis or badminton)	20.8%	16.2%	19.1%	109
Downhill skiing	18.2%	12.5%	16.2%	113
Canoeing or kayaking	17.1%	16.5%	16.9%	101
Rollerblading	14.9%	13.5%	14.4%	103
Cross-country skiing	12.9%	11.7%	12.5%	103
Riding an all-terrain vehicle (ATV)	11.4%	19.4%	14.3%	80
Snowmobiling	7.0%	14.7%	9.8%	72
Horseback riding	6.6%	7.2%	6.8%	97
Hunting	5.8%	11.3%	7.7%	75
Snowboarding	5.4%	4.3%	5.0%	108
Skateboarding	1.6%	1.5%	1.6%	102

Accommodation Stayed In While on Trips

Those who took a pleasure trip outside of Canada were much more likely to have stayed in a resort (e.g., seaside resorts, lakeside / riverside resorts, ski or mountain resorts) in the last two years. They also frequently stayed in public and private campgrounds.

Relative to those who did not travel outside of Canada, out-of-country travelers were much more likely to have stayed in a seaside resort. They were also more likely to have stayed in many of the more exotic accommodation types (e.g., health spa, cooking school) as well as wilderness settings (e.g., remote wilderness lodge or outpost). On the other hand, those who only took trips within Canada predominantly stayed in public or private campgrounds or lakeside or riverside resorts. However, they were more likely to have stayed in a campsite in a wilderness setting than were out-of-country travelers.

Fig. 10 Accommodation Stayed In While on Trips

	Took a Pleasure Trip Outside of Canada	Only Took Pleasure Trips Within Canada	Total Pleasure Travelers in Canada	Index
Size of Market	11,872,817	6,566,692	18,439,508	100
Seaside Resort	29.2%	5.4%	20.7%	141
A Public Campground in a National, State, Provincial or Municipal Park	26.1%	26.9%	26.4%	99
Lakeside / Riverside Resort	25.2%	17.0%	22.3%	113
A Private Campground	18.0%	20.2%	18.8%	96
Ski Resort or Mountain Resort	17.1%	8.2%	13.9%	123
A Camp Site in a Wilderness Setting (Not a Campground)	7.8%	10.1%	8.6%	90
Health Spa	7.0%	4.1%	5.9%	117
Wilderness Lodge You Can Drive to by Car	5.8%	5.4%	5.6%	103
Country Inn or Resort with Gourmet Restaurant	5.6%	4.2%	5.1%	110
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	5.0%	3.6%	4.5%	111
Farm or Guest Ranch	3.0%	3.1%	3.0%	98
Remote or Fly-In Wilderness Lodge	1.9%	1.1%	1.6%	118
On a Houseboat	1.6%	1.0%	1.4%	115
Remote or Fly-In Wilderness Outpost	0.7%	0.4%	0.6%	118
Cooking School	0.5%	0.1%	0.4%	134
Wine Tasting School	0.2%	0.3%	0.3%	90

Tours and Cruises Taken During Past Two Years

Canadians who took trips outside of Canada were much more likely to have taken tours and cruises during the last two years than were those who only traveled within Canada. Sameday tours (both organized and self-guided), city tours and scenic country drives were the most popular with out-of-country travelers. However, relative to those who did not take pleasure trips outside of Canada, out-of-country travelers were especially likely to have taken sameday and multiple-day guided tours, city tours and tours of wineries, factories or casinos. They were also especially likely to have taken ocean cruises (e.g., Caribbean cruises, Alaskan cruises).

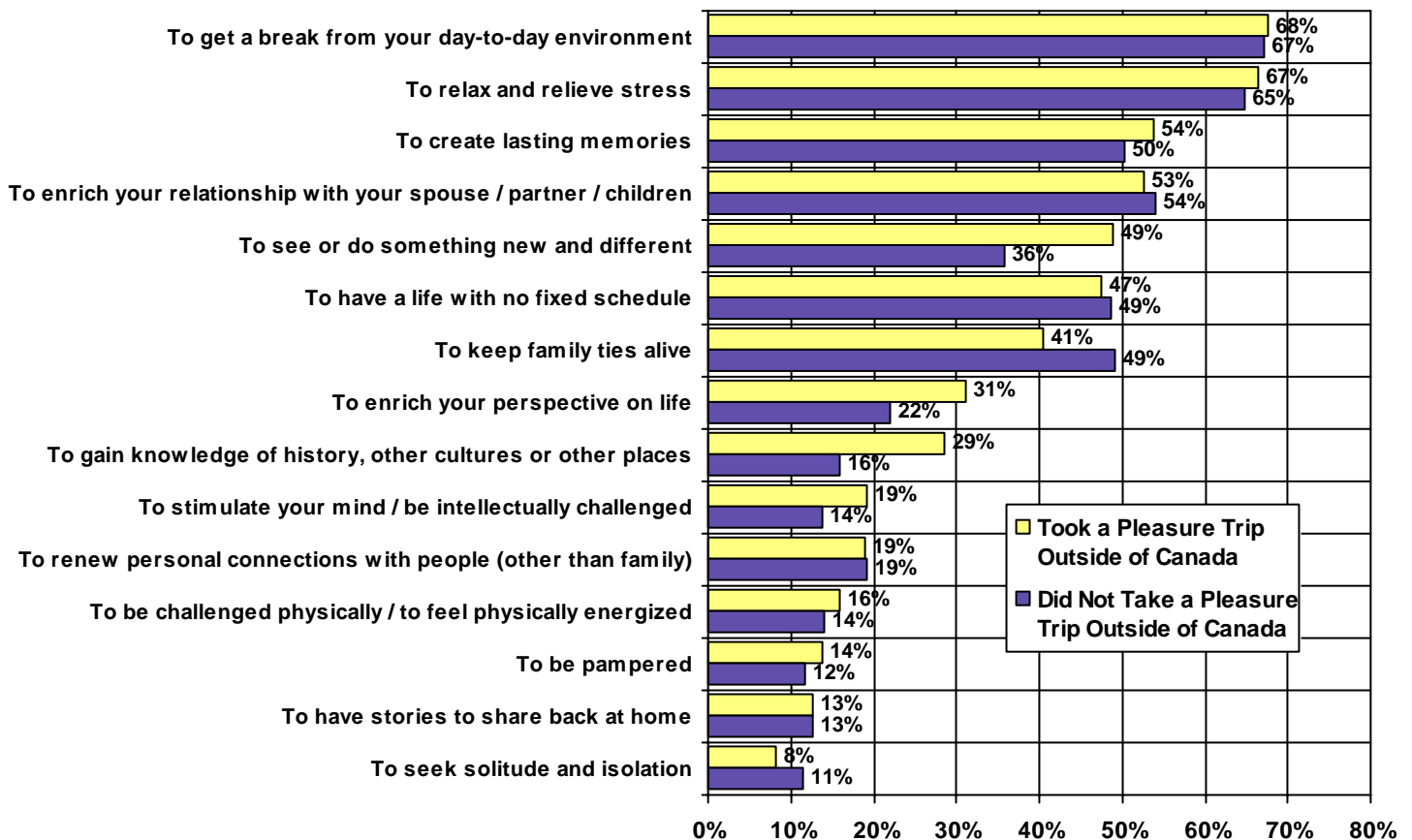
Fig. 11 Tours and Cruises Taken During Past Two Years

	Took a Pleasure Trip Outside of Canada	Only Took Pleasure Trips Within Canada	Total Pleasure Travelers in Canada	Index
Size of Market	11,872,817	6,566,692	18,439,508	100
A self-guided, sameday tour while on an overnight trip	34.5%	19.8%	29.3%	118
Around the city	29.5%	12.3%	23.4%	126
An organized, sameday, guided tour while on an overnight trip	29.3%	9.3%	22.2%	132
Around the countryside - scenic drives	26.6%	14.9%	22.4%	118
A self-guided, overnight tour where you stayed in different locations	21.3%	12.4%	18.1%	117
On the water (sightseeing cruise)	16.6%	6.8%	13.1%	127
Wilderness tour	14.8%	9.7%	13.0%	114
An organized, overnight, guided tour where you stayed in different locations	13.7%	3.5%	10.1%	136
Some other type of tour	12.5%	5.1%	9.8%	127
An organized, overnight, guided tour where you stayed in a single location	9.6%	4.6%	7.8%	123
Caribbean ocean cruise	8.2%	0.0%	5.4%	151
To a casino	7.8%	4.1%	6.5%	120
To a winery	7.4%	2.5%	5.6%	131
Ocean cruise - Other	4.9%	0.5%	3.3%	147
To a factory	3.7%	0.8%	2.6%	138
Cruise on another lake or river	2.7%	1.8%	2.4%	114
In the air as a pilot or passenger of an airplane or helicopter	2.6%	0.7%	1.9%	136
Alaskan ocean cruise	2.4%	0.0%	1.6%	148
Some other type of cruise	2.1%	0.7%	1.6%	133
Cruise on the St. Lawrence River	1.6%	2.5%	1.9%	85
Great Lakes cruise	0.9%	0.5%	0.8%	117
Submarine cruise	0.2%	0.0%	0.1%	141

Benefits Sought While on Vacation

Most Canadian Pleasure Travelers tend to take vacations to get a break from their day-to-day environment, relax and relieve stress, create lasting memories and enrich their relationships with family members. However, those who took trips outside of Canada are more likely to prefer vacations that provide intellectual stimulation, learning opportunities (e.g., learn about the history and culture of the destination) and novelty (i.e., to see and do something new). By contrast, those who only traveled within Canada are more likely to prefer vacations that offer solitude and allow them to keep family ties alive.

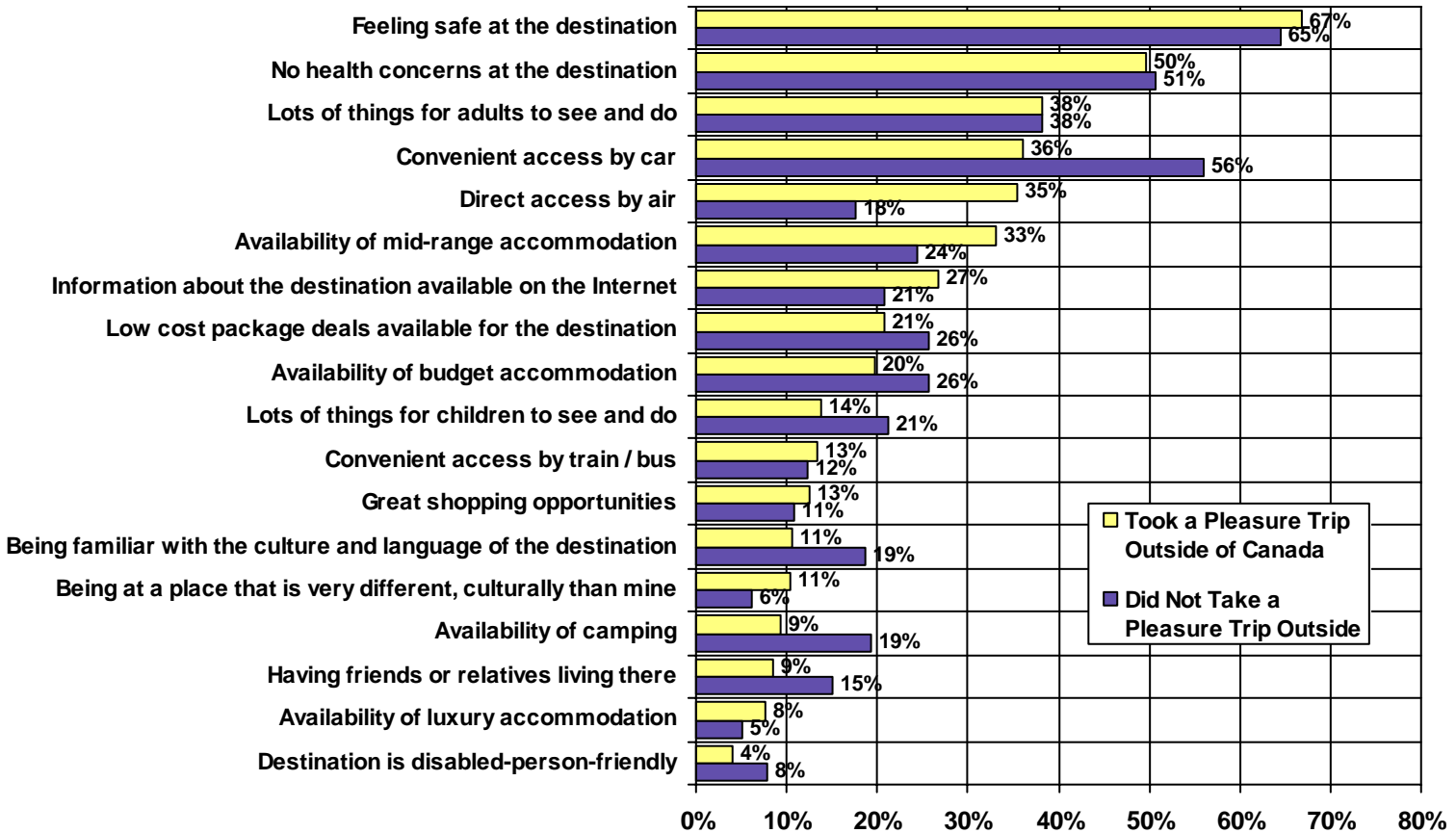
Fig.12 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

Most Canadian Pleasure Travelers consider it important that they feel safe at a destination. However, other attributes considered important in a destination vary considerably between out-of-country travelers and those who took pleasure trips exclusively within Canada. Those who took trips to other countries are more likely to value destinations that have a distinct culture, luxury or mid-range priced accommodation and direct access by air. This suggests that out-of-country travelers value novelty and tend to spend more on travel. By contrast, those who only took trips within Canada are more likely to look for a destination that is conveniently accessible by car, has a familiar culture and language, has lots of activities for children to see and do and has family or friends living nearby. They also prefer destinations that offer budget-priced accommodation or camping and that are suitable for persons with disabilities. This suggests that those who travel within Canada tend to take lower-cost, family-oriented vacations.

Fig. 13 Importance of Destination Attributes (% Rating Each Attribute as "Highly Important")



How Destinations Are Selected

The majority of Canadian Pleasure Travelers start their vacation planning with a particular destination in mind. However, selecting a destination first is more common among those who take trips outside of Canada (as well as to other provinces within Canada). Out-of-country travelers are also more likely to be responsive to discount vacation packages than those who travel exclusively within Canada. This in part may reflect the fact that those who only travel within Canada tend to take shorter-haul, family-oriented trips which may involve staying with relatives or friends or camping.

Fig. 14 How Destinations Are Selected (Summer and Winter Vacations)

	Took a Pleasure Trip Outside of Canada	Only Took Pleasure Trips Within Canada	Total Pleasure Travelers in Canada	Index
Size of Market	11,872,817	6,566,692	18,439,508	100
Summer				
Started with a desired destination in mind	51.2%	43.7%	48.5%	106
Started by considering specific activities wanted to do	12.8%	15.5%	13.8%	93
Started with a certain type of vacation experience in mind	23.1%	24.8%	23.7%	97
Looked for packaged deals - no destination in mind	1.5%	1.0%	1.3%	114
Considered something else first	4.0%	4.8%	4.3%	94
Don't know / Other	7.4%	10.2%	8.4%	88
Winter				
Started with a desired destination in mind	50.9%	42.8%	48.6%	105
Started by considering specific activities wanted to do	15.4%	16.0%	15.6%	99
Started with a certain type of vacation experience in mind	18.6%	21.2%	19.3%	96
Looked for packaged deals - no destination in mind	4.1%	0.9%	3.2%	128
Considered something else first	3.7%	7.0%	4.7%	80
Don't know / Other	7.3%	12.1%	8.6%	84

Trip Planning and Information Sources Consulted

The majority of Canadian Pleasure Travelers are responsible for planning their trips either on their own (42.0%) or with someone else (16.4%). This is especially the case for those who take trips outside of Canada. When making vacation plans, most Canadians obtain information from the Internet, past experience and the advice of others. However, those who travel outside of Canada are more likely to consult a wider range of information sources to plan their trips. Relative to those who exclusively traveled within Canada, out-of-country travelers are especially likely to obtain travel information from the Internet, travel agents, travel guide books such as Fodor's and automotive clubs. They are also more likely to obtain travel information from newspaper and magazine articles and advertising and to make use of the official tourism guides and brochures from states and provinces. By contrast, those who did not take a trip outside of Canada are more likely to obtain travel information from television advertising.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Took a Pleasure Trip Outside of Canada	Only Took Pleasure Trips Within Canada	Total Pleasure Travelers in Canada	Index
Size of Market		11,872,817	6,566,692	18,439,508	100
Who Plans Trips?	Respondent plans trips	42.0%	42.2%	42.0%	100
	Trip planning a shared responsibility	17.6%	14.2%	16.4%	107
	Someone else plans trips	40.4%	43.7%	41.5%	97
Information Sources Consulted	An Internet website	74.2%	48.0%	65.2%	114
	Advice of others / Word-of-mouth	53.4%	46.8%	51.1%	104
	Past experience / Been there before	51.8%	47.7%	50.4%	103
	A travel agent	47.8%	7.7%	34.1%	140
	Maps	35.8%	26.3%	32.6%	110
	Official travel guides or brochures from state / province	28.3%	21.5%	26.0%	109
	Articles in newspapers / magazines	24.3%	14.3%	20.9%	116
	Visitor information centres	24.0%	22.3%	23.4%	102
	An auto club such as CAA	21.3%	10.6%	17.7%	121
	Travel guide books such as Fodor's	19.0%	3.3%	13.6%	139
	Advertisements in newspapers / magazines	16.0%	10.9%	14.3%	112
	Travel information received in the mail	9.3%	7.9%	8.8%	105
	Programs on television	8.1%	6.3%	7.5%	108
	An electronic newsletter or magazine received by e-mail	5.4%	1.8%	4.2%	129
	Advertisements on television	4.5%	5.9%	5.0%	91
Visits to trade, travel or sports shows	3.3%	2.8%	3.1%	105	

Use of the Internet to Plan and Arrange Trips

Overall, 59.1% of the Canadian Pleasure Travelers use the Internet to plan travel and 37.0% have booked travel on-line during the past two years. Those who took trips outside of Canada are especially likely to use the Internet to plan (69.1%) or book (47.0%) travel. The majority of those who took an out-of-country trip use the websites of hotels or resorts, travel planning / booking sites or the website of a specific country, region or city. However, out-of-country travelers are much more likely than those who did not take a trip outside of Canada to consult airline websites, travel planning / booking websites (e.g., Expedia) and cruise-line websites. By contrast, those who only took pleasure trips within Canada are most likely to visit the websites of hotels or resorts or the website of a specific country, region or city. Canadian Pleasure Travelers most often use the Internet to purchase airline tickets and accommodation. However those who took trips outside of Canada are especially likely to use the Internet to purchase airline tickets, vacation packages, car rentals and tickets for travel by rail, bus or boat.

Fig. 16 Use of the Internet to Plan and Book Travel

		Took a Pleasure Trip Outside of Canada	Only Took Pleasure Trips Within Canada	Total Pleasure Travelers in Canada	Index
	Size of Market	11,872,817	6,566,692	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	30.9%	58.8%	40.8%	76
	Uses Internet to plan trips only	22.1%	22.1%	22.1%	100
	Uses Internet to book part of trip	47.0%	19.1%	37.0%	127
Types of Websites Consulted	A website of a hotel or resort	60.0%	47.9%	57.0%	105
	A travel planning / booking website	54.9%	17.7%	45.7%	120
	An airline website	54.0%	23.1%	46.3%	117
	A tourism website of a country / region / city	51.3%	45.4%	49.8%	103
	A website of an attraction	33.9%	36.1%	34.5%	98
	Some other website	26.5%	30.8%	27.6%	96
	A cruise line website	10.0%	2.0%	8.1%	125
	A motorcoach website	2.6%	1.9%	2.5%	107
Parts of Trips Booked Over The Internet	Air tickets	74.1%	48.6%	69.5%	107
	Accommodation	71.1%	60.6%	69.2%	103
	Car rental	30.4%	12.5%	27.1%	112
	Tickets or fees for specific activities or attractions	23.8%	22.9%	23.6%	101
	A package containing two or more items	17.5%	6.0%	15.4%	114
	Tickets for rail, bus or boat / ship fares	16.7%	9.1%	15.3%	109
	Other	3.9%	4.0%	3.9%	99

Media Consumption Habits

Those who took a trip outside of Canada are much more likely to consume travel media (e.g., travel sections of newspapers, travel magazines, travel websites) than those who exclusively traveled within Canada. Out-of-country travelers may also be effectively reached through city lifestyle magazines, business, finance and investing magazines and news media (e.g., news magazines, news / talk / information radio). Those who only travel within Canada are more likely to read home-oriented magazines (e.g., family and parenting; home and garden; craft, antiques and collectibles), to watch daytime television and listen to country music radio stations.

Fig. 17 Media Consumption Habits

		Took a Pleasure Trip Outside of Canada	Only Took Pleasure Trips Within Canada	Total Pleasure Travelers in Canada	Index
	Size of Market	11,872,817	6,566,692	18,439,508	100
Newspaper Readership	Reads daily newspaper	88.3%	85.4%	87.3%	101
	Reads weekend edition of newspaper	88.5%	85.1%	87.3%	101
	Reads local neighbourhood or community newspapers	61.3%	61.9%	61.5%	100
	Reads other types of newspapers	18.1%	15.5%	17.2%	105
	Frequently or occasionally reads travel section of daily newspaper	52.7%	33.1%	45.7%	115
	Frequently or occasionally reads travel section of weekend newspaper	55.2%	33.1%	47.3%	117
Types of Magazines Read (Top 5 Indexed)	Business, finance and investing	20.1%	9.3%	16.3%	124
	Travel (e.g., Condé Nast)	14.3%	7.1%	11.8%	122
	Magazines about your city	14.3%	7.8%	12.0%	119
	News magazine	26.2%	20.4%	24.2%	109
	Fashion and beauty	25.6%	20.2%	23.7%	108
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	33.9%	23.7%	30.3%	112
	Sports / sports shows	44.8%	40.7%	43.3%	103
	Cooking shows	32.5%	30.4%	31.7%	102
	Dramas (e.g., Law & Order)	58.1%	55.8%	57.3%	101
	History	42.4%	40.8%	41.8%	101
Type of Radio Programs Listened To (Top 5 Indexed)	Jazz / Big band	9.9%	6.7%	8.8%	113
	Classical music	19.1%	13.9%	17.2%	111
	Multicultural	9.2%	6.8%	8.4%	110
	News / Talk / Information	42.3%	34.2%	39.4%	107
	Soft music / Adult contemporary	27.4%	22.8%	25.7%	106
Types of Websites Visited (Top 5 Indexed)	Travel	58.6%	33.7%	50.6%	116
	Network news sites (e.g., CBC, CNN)	39.1%	30.0%	36.1%	108
	Newspaper sites	33.8%	27.5%	31.8%	106
	Sports	28.6%	23.4%	26.9%	106
	Shopping (all types)	34.8%	30.7%	33.5%	104

Appendix One
Canadian 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 Paleontological/Archaeological Sites
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	High-End Restaurants with an International Reputation
	Went to Local Outdoor Cafes	Other High-End Restaurants
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	Food /Drink Festivals
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	Entertainment Farms (e.g., Corn Maze, Petting Zoo)
	Wax Museums	
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	Professional Soccer Games
Live Theatre	Live Theatre	Live Theatre with Dinner
	Theatre Festivals	
Literary & Film Festivals	Literary Festivals or Events	International Film Festivals
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)
Casinos	Went to a Casino	
Spas	Day Visit to a Health & Wellness Spas while on an Overnight Trip	
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National / Provincial Park
	Curatorial Tours	Archaeological Digs
Equestrian & Western Events	Equine (Horse) Competitions	Western Theme Events (e.g., Rodeos)
	Horse Races	

Appendix One		
Canadian TAMS 2006 Culture and Entertainment Segmentation		
Activity Segment	Activities in Segment	
Agro-Tourism	Dining At A Farm	Harvesting and /or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	
National & International Sporting Events	Curling Bonspiel	National /International Sporting Events such as the Olympic Games
	Professional Figure Skating	
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related
Musical Concerts, Festivals & Attractions	Music Festivals	Musical Attractions
	Jazz Concert	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Rock & Roll/Popular Music Concert	Country & Western Music Concert
Comedy Festivals & Clubs	Comedy Festivals	Stand-up Comedy Clubs & Other Variety Shows

Appendix Two: Canadian 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	Ocean Kayaking / Canoeing
	Hiking /Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
		White Water Rafting
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkeling in Sea /Ocean
	Sunbathing, Sitting on a Beach	Scuba Diving in Sea/Ocean
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Freshwater Scuba & Snorkeling	Scuba Diving in Lakes /Rivers	Snorkeling 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	Cross-country or Back Country as an Overnight Touring Trip
	Snowshoeing	
Wilderness Activities	Wilderness Skills Courses	Dog Sledding
	Ice Climbing	
Skating	Ice Skating	In-Line /Rollerblading
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	
Team Sports	Ice Hockey	Curling
	Football	Basketball
	Baseball or Softball	Soccer
Sports & Games	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	