

CANADIAN TRAVEL MARKET

**Out-of-Province Travel by
Residents of Manitoba**

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
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Executive Summary

Over the last two years, 73.3% (618,121) of adult, Manitoba residents took an out-of-province, overnight trip (for any purpose). Overall, 92.5% of those who took a pleasure trip (i.e., Pleasure Travelers) report taking at least one pleasure trip outside of the province. Manitoba Pleasure Travelers, along with Saskatchewan Pleasure Travelers, are the most likely to take pleasure trips outside of their provinces. However, 68.8% of those who took a trip outside of Manitoba also took a trip within the province in the last two years. In terms of out-of-province Canadian travel, 76.7% took an out-of-province trip to an adjacent province and 64.1% took a trip to a non-adjacent province. In terms of out-of-country travel, Manitoba residents primarily took trips to the United States (60.2%). Only 13.1% took a trip to Mexico, 9.8% traveled to the Caribbean and 9.9% took a trip to an overseas destination in the last two years.

Manitoba residents who took out-of-province pleasure trips are over-represented among those who are 34 years old and younger. By contrast, those who only traveled within Manitoba are over-represented among those 45 to 54. Out-of-province travelers are more likely to have a university degree and report higher average household incomes.

Manitoba residents who took a trip outside of the province were very active in culture and entertainment pursuits while traveling. They were especially likely to have attended live art performances (e.g., high art performances, live theatre) and professional sporting events and to have visited historical sites, museums and art galleries, science and technology exhibits and garden-themed attractions while on trips. They are also much more active in outdoor activities while on trips and particularly resort-based activities (e.g., swimming in the ocean, sunbathing, sailing and surfing), strenuous outdoor activities (e.g., downhill skiing, exercising and jogging) and competitive sports (e.g., team sports, golfing). By contrast, within-province travelers were more likely to go hunting, cross-country skiing, snowmobiling, ATVing and motorcycling while on trips. Those who traveled outside of Manitoba seek vacations that provide intellectual stimulation, learning opportunities and novelty. By contrast, those who only traveled within the province are more likely to prefer vacations that offer solitude and allow them to enrich their relationships with family members.

Manitoba residents who traveled outside the province are below-average users of the Internet to plan (58.4%) and book travel (35.1%) while within-province travelers typically do not use the Internet to plan (20.4%) or book (3.1%) travel. Out-of-province travelers may be effectively reached through city lifestyle magazines, business, finance and investing magazines and professional sports media as well as modern and alternative rock radio stations. Those who only travel in Manitoba are more likely to read home-related magazines (e.g., Home & Garden) and listen to country music radio stations.

Out-of-Province Travel by Residents of Manitoba

Market Incidence

Over the last two years, 73.3% (618,121) of adult, Manitoba residents took an out-of-province, overnight trip (for any purpose). 89.1% (550,554) of those who took a trip outside of Manitoba report that they took at least one out-of-province, pleasure trip during the past two years.

Overall, 92.5% of those who took a pleasure trip (i.e., Pleasure Travelers) report taking at least one pleasure trip outside of the province. Manitoba Pleasure Travelers, as well as Saskatchewan Pleasure Travelers, are the most likely to take pleasure trips outside of their provinces and much more likely than the residents of Quebec (75.7%) and the Atlantic Region (71.7%). (Note: Due to the nature of the Canadian TAMS database, travel between the provinces in the Atlantic Region is not defined as out-of-province travel).

81.9% of the out-of-province pleasure trips taken by Manitoba residents were to other Canadian destinations, while 64.2% of the out-of-province pleasure trips were to destinations outside of Canada.

Fig. 1 Incidence of Trips¹ from Manitoba during the Past Two Years

	Residents of Manitoba
Number Taking a Trip Outside of the Province (Any Purpose) ²	618,121
Percent of Provincial Population	73.3%
Number Taking a Pleasure Trip Outside of Province ³	550,544
Percent of Pleasure Travelers in Province ⁴	92.5%
Percent Taking a Pleasure Trip to Another Canadian Destination Outside of Province ⁵	81.9%
Percent Taking a Pleasure Trip Outside of Canada ⁶	64.2%

- 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 Manitoba residents who took at least one overnight trip outside Manitoba in the last two years for any purpose.
- 3 - This row reports the number of Manitoba residents who took an out-of-province "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 Manitoba "Pleasure Travelers" who took an out-of-province pleasure trip in the last two years.
- 5 - This row reports the percent of out-of-province, pleasure trips to other Canadian destinations.
- 6 - This row reports the percent of out-of-province, pleasure trips to destinations outside of Canada.

Demographic Profile

Manitoba residents who took out-of-province pleasure trips are over-represented among those who are 34 years old and younger. By contrast, those who only traveled within Manitoba are over-represented among those 45 to 54. Out-of-province travelers are more likely to have a university degree (26.2%) than those who only traveled within the province (11.0%) and report higher average household incomes (\$68,690 vs. \$44,776). This suggests that travelers who tend to take trips exclusively within Manitoba may lack sufficient discretionary income for out-of-province travel.

Fig. 2 Demographic Profile of Manitoba Residents Who Took an Out-of-Province Trip

Attribute	Size of Market	Took a Pleasure Trip Outside of Manitoba	Only Took Pleasure Trips Within Manitoba ¹	Total Pleasure Travelers in Manitoba	Index ²
		550,544	44,514	595,057	100
Gender	Male	49.6%	38.3%	48.8%	102
	Female	50.4%	61.7%	51.2%	98
Age of Respondent	18 to 24	14.3%	5.9%	13.7%	105
	25 to 34	18.4%	14.1%	18.1%	102
	35 to 44	19.8%	19.2%	19.7%	100
	45 to 54	21.7%	32.9%	22.5%	96
	55 to 64	13.4%	15.3%	13.5%	99
	65 Plus	12.5%	12.6%	12.5%	100
Average Age		44.2	47.7	44.4	N/A
Marital Status	Not married	29.9%	26.0%	29.6%	101
	Married	70.1%	74.0%	70.4%	100
Parental Status	No children under 18	66.0%	62.8%	65.7%	100
	Children under 18	34.0%	37.2%	34.3%	99
Education	High school or less	44.8%	61.0%	46.1%	97
	Some post-secondary	11.9%	6.9%	11.5%	103
	Post-secondary diploma/certificate	17.1%	21.2%	17.4%	98
	University degree	26.2%	11.0%	25.0%	105
Household Income	Under \$20,000	6.3%	18.3%	7.2%	88
	\$20,000 to \$39,999	16.4%	23.4%	16.9%	97
	\$40,000 to \$59,999	15.8%	28.5%	16.7%	94
	\$60,000 to \$79,999	17.4%	8.6%	16.8%	104
	\$80,000 to \$99,999	12.4%	2.7%	11.7%	106
	\$100,000 or more	18.0%	6.2%	17.1%	105
	Not stated	13.6%	12.2%	13.5%	101
Average Household Income		\$68,690	\$44,779	\$66,875	N/A

- 1 - "Only Took Pleasure Trips Within Manitoba" 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 province.
- 2 - The "Index" is calculated by dividing the percent for those who took an out-of-province trip by the total percent of pleasure travelers in each group. The Index indicates the extent to which out-of-province pleasure travelers are over or under-represented relative to all pleasure travelers in the province. An index of 100 means the percent of out-of-province travelers is the same as that of the average pleasure traveler. Index values over 100 indicate that out-of-province travelers are over-represented relative to the average pleasure traveler in the province. Index values less than 100 indicate that out-of-province travelers are under-represented relative to the average pleasure traveler in the province.

Travel Activity (During Last Two Years)

68.8% of those who took a trip outside of Manitoba also took a trip within the province during the last two years. In terms of out-of-province Canadian travel, 76.7% took an out-of-province trip to an adjacent province with 54.4% traveling to Ontario and 47.0% taking a trip to Saskatchewan. 64.1% took a trip to a non-adjacent province or region, most often Alberta (47.4%) and British Columbia (33.5%).

In terms of out-of-country travel, Manitoba residents primarily took trips to the United States (60.2%). Only 13.1% took a trip to Mexico, 9.8% traveled to the Caribbean and 9.9% took a trip to an overseas destination in the last two years.

Fig. 3 Percent Traveling to Other Canadian Destinations during Past Two Years

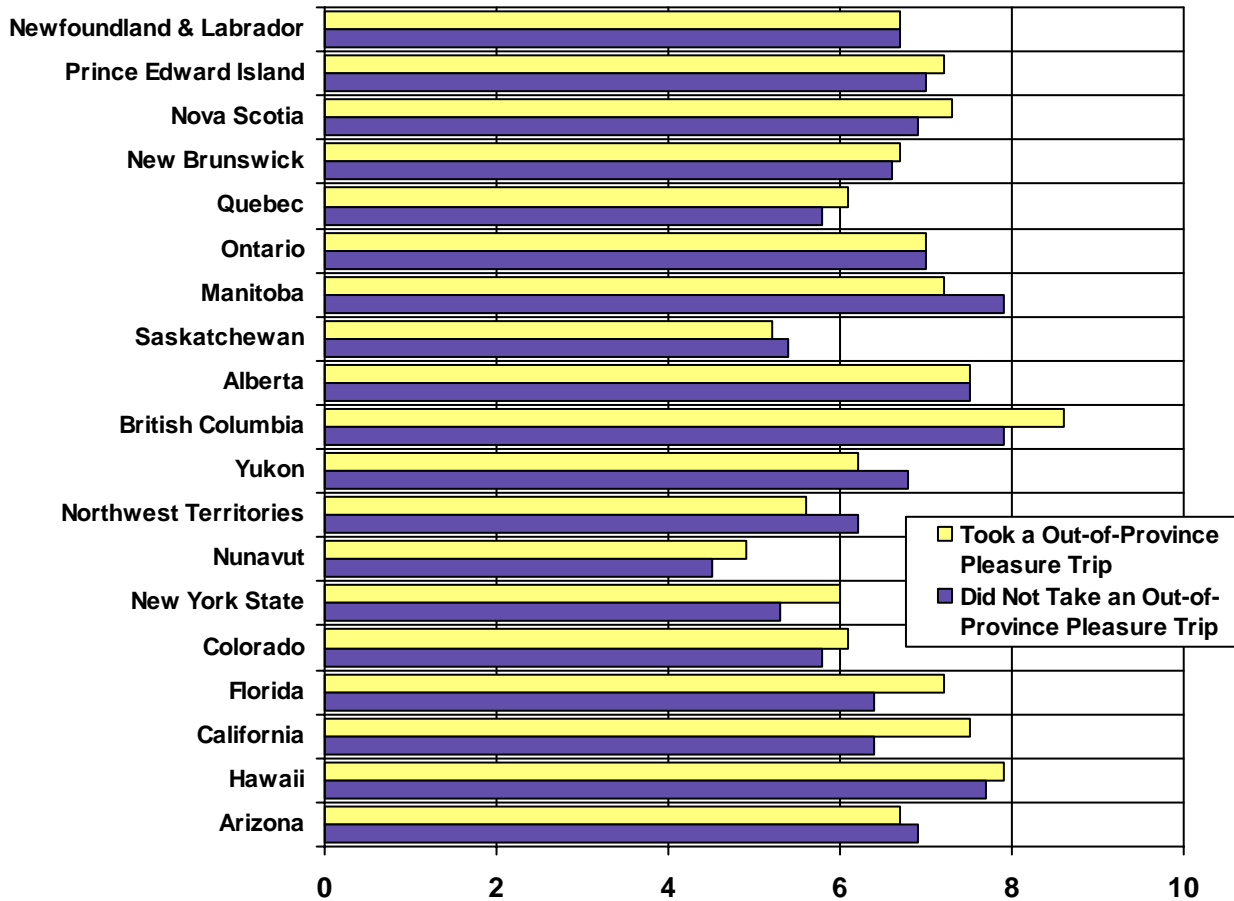
	Took a Pleasure Trip Outside of Manitoba	Only Took Pleasure Trips Within Manitoba	Total Pleasure Travelers in Manitoba
Size of Market	550,544	44,514	595,057
Canada	94.6%	100.0%	95.0%
Took a trip within own province / region	68.8%	100.0%	71.2%
Took a trip to an adjacent province / region	76.7%	0.0%	71.0%
Took a trip to non-adjacent province / region	64.1%	0.0%	59.3%
Newfoundland and Labrador	1.4%	0.0%	1.3%
Prince Edward Island	3.1%	0.0%	2.9%
New Brunswick	5.3%	0.0%	4.9%
Nova Scotia	4.2%	0.0%	3.9%
Quebec	13.6%	0.0%	12.6%
Ontario	54.4%	0.0%	50.3%
Manitoba	68.8%	100.0%	71.2%
Saskatchewan	47.0%	0.0%	43.5%
Alberta	47.4%	0.0%	43.9%
British Columbia	33.5%	0.0%	31.0%
Yukon	1.2%	0.0%	1.1%
Northwest Territories	0.7%	0.0%	0.6%
Nunavut	0.4%	0.0%	0.4%
United States	60.2%	0.0%	55.7%
Mexico	13.1%	0.0%	12.2%
Caribbean	9.8%	0.0%	9.1%
All other destinations	9.9%	0.0%	9.2%

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.

Manitoba residents who took an out-of-province trip have a more favourable impression of British Columbia than those who traveled exclusively within the province. On the other hand, they have a less favourable impression of their own province as a travel destination as well as the three northern territories. Their impressions of the other Canadian destinations are comparable to those who did not travel outside of the province. However, those who traveled outside of Manitoba perceived the six U.S. reference states to be more appealing travel destinations than do those who only traveled within the province and especially California, New York State and Florida.

Fig. 4 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

Manitoba residents who took a trip outside of the province are much more likely to participate in culture and entertainment pursuits while on trips than those who only took trips within Manitoba. Out-of-province 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 Manitoba, out-of-province travelers were much more likely to have attended live art performances (e.g., high art performances, live theatre, musical concerts, comedy festivals and clubs, music festivals) 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-province travelers from Manitoba 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 traveling during the past two years.

Fig. 5 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 Manitoba	Only Took Pleasure Trips Within Manitoba	Total Pleasure Travelers in Manitoba	Index
Size of Market	550,544	44,514	595,057	100
Shopping & Dining	87.2%	54.7%	84.8%	103
Historical Sites, Museums & Art Galleries	55.3%	21.5%	52.7%	105
Theme Parks & Exhibits	44.3%	17.8%	42.3%	105
Fairs & Festivals	37.5%	24.7%	36.5%	103
Musical Concerts, Festivals & Attractions	29.4%	19.6%	28.7%	103
Casinos	26.1%	7.1%	24.7%	106
Science & Technology Exhibits	21.0%	9.5%	20.1%	104
Professional Sporting Events	17.7%	5.3%	16.8%	106
Garden Theme Attractions	15.4%	0.5%	14.3%	108
Wine, Beer & Food Tastings	14.1%	0.0%	13.0%	108
Live Theatre	13.7%	3.5%	13.0%	106
Agro-Tourism	13.5%	11.2%	13.4%	101
Amateur Tournaments	10.6%	9.4%	10.5%	101
Aboriginal Cultural Experiences	9.4%	6.0%	9.2%	103
High Art Performances	9.1%	1.5%	8.6%	107
Spas	9.0%	4.8%	8.7%	104
Comedy Festivals & Clubs	7.9%	2.6%	7.5%	105
Equestrian & Western Events	7.6%	2.3%	7.2%	105
Participatory Historical Activities	5.6%	4.9%	5.5%	101
National & International Sporting Events	4.3%	6.3%	4.5%	97
Literary & Film Festivals	1.4%	0.0%	1.3%	108

Culture and Entertainment Activities Pursued While Not on Trips

Manitoba residents who took an out-of-province trip 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., rock concerts, the opera, ballet, classical music concerts, live theatre, jazz clubs) and to attend professional sporting events. They are also more likely than within-province travelers to visit local museums, art galleries and art shows, local zoos and aquariums and local amusements parks. On the other hand, those who exclusively traveled within the province are more likely to have attended local amateur sporting and to gamble in a local casino. This pattern reflects the fact that out-of-province travelers are younger, better-educated and have higher household incomes.

Fig. 6 Culture and Entertainment Activities Pursued While Not on Trips

	Took a Pleasure Trip Outside of Manitoba	Only Took Pleasure Trips Within Manitoba	Total Pleasure Travelers in Manitoba	Index
Size of Market	550,544	44,514	595,057	100
Going out to eat in restaurants	90.9%	87.6%	90.7%	100
Going to festivals or fairs	61.8%	47.0%	60.7%	102
Going to amateur sporting events	48.1%	53.4%	48.5%	99
Going to zoos or aquariums	42.0%	22.3%	40.5%	104
Going to professional sporting events	40.9%	13.8%	38.9%	105
Going to historic sites or heritage buildings	36.4%	27.0%	35.7%	102
Going to pick-your-own farms or farmers' market	35.5%	24.3%	34.7%	102
Going to museums	33.0%	20.1%	32.0%	103
Going to live theatre	28.2%	13.7%	27.1%	104
Going to rock music concerts	26.4%	11.2%	25.3%	104
Going to amusement or theme parks	26.1%	14.1%	25.2%	104
Going dancing	24.1%	12.6%	23.2%	104
Going to bars with live pop or rock bands	23.8%	22.5%	23.7%	100
Going to art galleries or art shows	23.4%	15.7%	22.8%	103
Going to gamble in casinos	21.1%	27.1%	21.5%	98
Going to botanical gardens	18.6%	17.0%	18.4%	101
Going to classical music concerts	14.0%	7.3%	13.5%	104
Staying overnight in a hotel or B&B in own city	13.1%	6.3%	12.5%	104
Going to day spas	10.5%	2.9%	10.0%	106
Going to rodeos	10.1%	11.6%	10.3%	99
Going to the ballet	9.5%	5.4%	9.2%	103
Going to the opera	5.8%	1.1%	5.4%	106
Going to jazz clubs	4.7%	1.8%	4.4%	105

Outdoor Activities Pursued While on Trips

Reflecting the younger age of out-of-province travelers, it is not surprising that they are much more active in outdoor activities while on trips than are those who only traveled within the province. In relative terms, out-of-province travelers were 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 played competitive sports (e.g., team sports, golfing) while on trips. By contrast, those who only took pleasure trips within the province were more likely to go hunting, cross-country skiing, snowmobiling, ATVing and motorcycling while on trips.

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

	Took a Pleasure Trip Outside of Manitoba	Only Took Pleasure Trips Within Manitoba	Total Pleasure Travelers in Manitoba	Index
Size of Market	550,544	44,514	595,057	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	46.1%	23.3%	44.4%	104
Boating & Swimming (e.g., motorboating, swimming in lakes)	45.5%	38.6%	45.0%	101
Wildlife Viewing	44.1%	30.7%	43.1%	102
Hiking, Climbing & Paddling	31.3%	17.9%	30.3%	103
Fishing	29.7%	26.2%	29.4%	101
Sports & Games (e.g., tennis, board games)	25.2%	31.7%	25.7%	98
Golfing	20.5%	10.7%	19.8%	104
Team Sports (e.g., hockey, baseball)	14.5%	10.8%	14.2%	102
Exercising & Jogging	14.4%	7.0%	13.8%	104
Cycling	12.6%	6.3%	12.2%	104
Snowmobiling & ATVing	12.4%	13.6%	12.5%	99
Skating (e.g., ice skating, rollerblading)	9.3%	9.0%	9.2%	100
Downhill Skiing & Snowboarding	7.4%	4.2%	7.2%	103
Hunting	6.1%	10.6%	6.4%	95
Cross-country Skiing & Snowshoeing	5.3%	6.5%	5.4%	98
Horseback Riding	4.8%	2.5%	4.6%	104
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	4.6%	2.5%	4.4%	103
Wilderness Activities (e.g., wilderness skills course)	2.1%	0.0%	1.9%	108
Motorcycling	1.8%	2.4%	1.9%	98
Freshwater Scuba & Snorkeling	1.8%	0.0%	1.7%	108
Extreme Air Sports (e.g., parachuting)	0.8%	0.0%	0.7%	108

Outdoor Activities Pursued While Not on Trips

While NOT traveling, Manitoba residents who traveled outside of the province, and who tend to be younger, are more active in the 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 the province are more likely to participate in nature-oriented activities such as hunting and fishing and riding ATV's or snowmobiles while not traveling.

Fig. 8 Outdoor Activities Pursued While NOT on Trips

	Took a Pleasure Trip Outside of Manitoba	Only Took Pleasure Trips Within Manitoba	Total Pleasure Travelers in Manitoba	Index
Size of Market	550,544	44,514	595,057	100
Day outing to a park	70.3%	55.5%	69.2%	102
Gardening	61.2%	57.6%	60.9%	100
Exercising at home or at a fitness club	59.8%	45.8%	58.8%	102
Swimming	59.1%	56.0%	58.9%	100
Picnicking	49.3%	38.6%	48.5%	102
Cycling	46.0%	38.4%	45.5%	101
Camping	42.4%	38.8%	42.2%	101
Fishing	39.7%	41.6%	39.8%	100
Hiking	37.9%	28.4%	37.2%	102
Golfing	37.3%	22.9%	36.2%	103
Ice-skating	29.4%	27.9%	29.3%	100
Playing team sports	25.8%	16.5%	25.1%	103
Sailing or other boating	25.7%	19.0%	25.2%	102
Jogging	24.2%	15.1%	23.5%	103
Playing racquet sports (e.g., tennis or badminton)	15.6%	8.4%	15.1%	104
Riding an all-terrain vehicle (ATV)	15.6%	20.5%	15.9%	98
Rollerblading	15.2%	10.0%	14.8%	103
Snowmobiling	13.6%	22.1%	14.2%	96
Canoeing or kayaking	13.6%	10.8%	13.4%	102
Cross-country skiing	10.1%	7.5%	9.9%	102
Hunting	9.7%	19.8%	10.4%	93
Horseback riding	8.1%	5.2%	7.9%	103
Downhill skiing	6.9%	5.2%	6.8%	102
Snowboarding	3.5%	3.5%	3.5%	100
Skateboarding	2.1%	0.0%	1.9%	108

Accommodation Stayed In While on Trips

Those who took a pleasure trip outside of the province 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 the province, those who took trips outside of Manitoba were especially 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, wine tasting school) as well as wilderness settings (e.g., remote wilderness lodge or outpost). On the other hand, those who only traveled within the province predominantly stayed in public or private campgrounds or lakeside or riverside resorts.

Fig. 9 Accommodation Stayed In While on Trips

	Took a Pleasure Trip Outside of Manitoba	Only Took Pleasure Trips Within Manitoba	Total Pleasure Travelers in Manitoba	Index
Size of Market	550,544	44,514	595,057	100
A Public Campground in a National, State, Provincial or Municipal Park	30.1%	22.9%	29.6%	102
Lakeside / Riverside Resort	20.0%	15.9%	19.7%	102
Seaside Resort	16.4%	1.0%	15.2%	108
A Private Campground	13.9%	9.7%	13.6%	102
Ski Resort or Mountain Resort	7.7%	4.2%	7.5%	104
A Camp Site in a Wilderness Setting (Not a Campground)	5.4%	4.0%	5.3%	102
Wilderness Lodge You Can Drive to by Car	5.1%	4.6%	5.1%	101
Health Spa	4.0%	1.8%	3.8%	104
Farm or Guest Ranch	3.2%	2.7%	3.1%	101
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	3.1%	0.7%	3.0%	106
Remote or Fly-In Wilderness Lodge	2.2%	0.7%	2.1%	105
Country Inn or Resort with Gourmet Restaurant	2.1%	1.6%	2.1%	102
On a Houseboat	1.1%	0.4%	1.1%	105
Remote or Fly-In Wilderness Outpost	0.7%	0.0%	0.6%	108
Cooking School	0.2%	0.0%	0.2%	108
Wine Tasting School	0.1%	0.0%	0.1%	108

Tours and Cruises Taken During Past Two Years

Manitoba residents who took an out-of-province trip were much more likely to have taken tours and cruises during the last two years than were those who only traveled within the province. Sameday tours (both organized and self-guided) and city tours were the most popular. However, relative to within-province travelers, out-of-province travelers were especially likely to have taken sameday and multiple-day, guided tours, tours of wineries, wilderness tours and cruises (e.g., Caribbean cruises, Alaskan cruises). Those who exclusively traveled within Manitoba were most likely to have taken self-guided single day tours and scenic drives in the country-side.

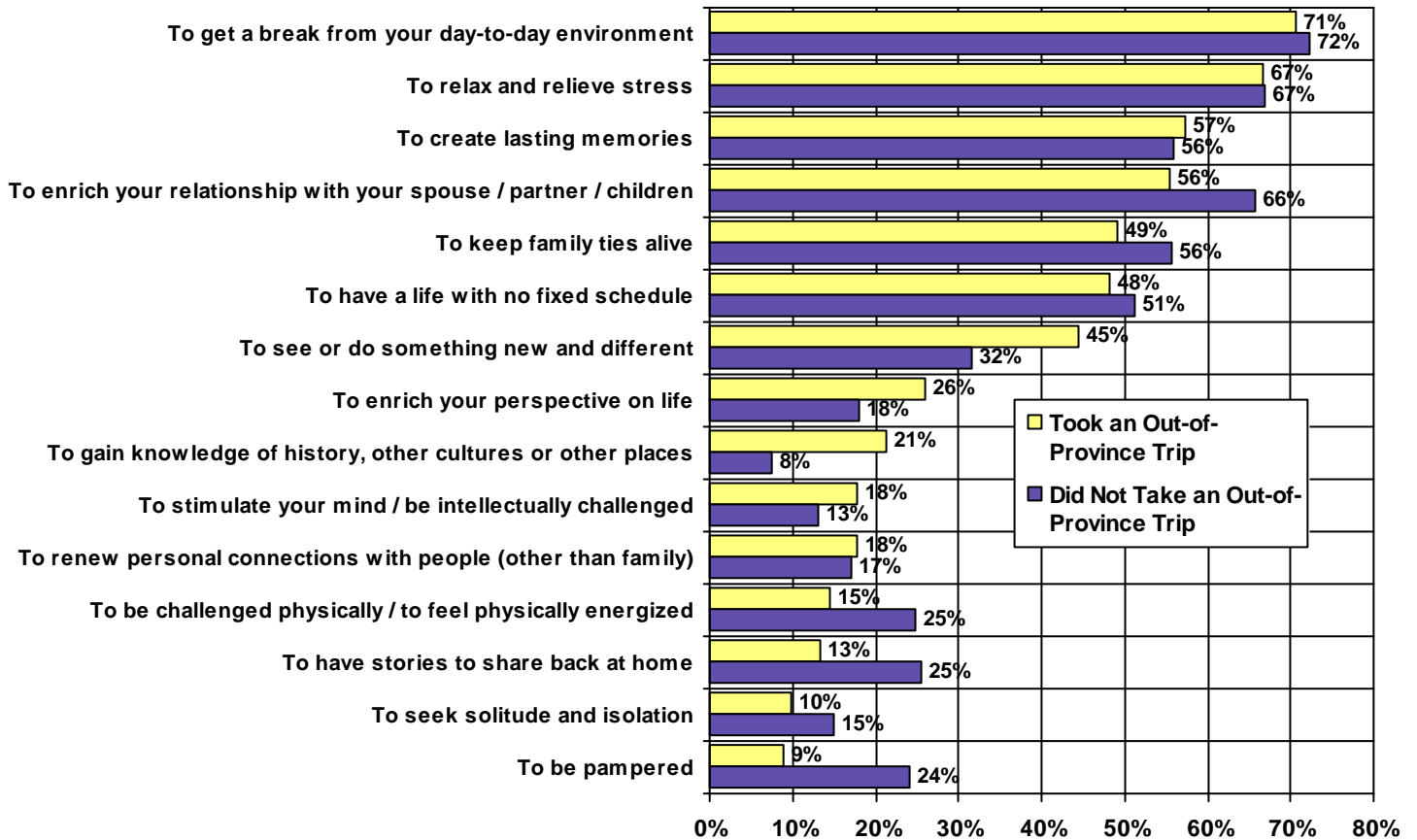
Fig. 10 Tours and Cruises Taken During Past Two Years

	Took a Pleasure Trip Outside of Manitoba	Only Took Pleasure Trips Within Manitoba	Total Pleasure Travelers in Manitoba	Index
Size of Market	550,544	44,514	595,057	100
A self-guided, sameday tour while on an overnight trip	24.1%	12.4%	23.2%	104
Around the city	20.5%	6.5%	19.4%	105
Around the countryside - scenic drives	20.2%	9.4%	19.4%	104
An organized, sameday, guided tour while on an overnight trip	19.9%	4.0%	18.7%	106
Wilderness tour	12.3%	7.4%	11.9%	103
A self-guided, overnight tour where you stayed in different locations	12.0%	6.4%	11.6%	104
On the water (sightseeing cruise)	10.2%	4.1%	9.7%	105
Some other type of tour	9.0%	4.4%	8.6%	104
An organized, overnight, guided tour where you stayed in different locations	7.6%	0.0%	7.0%	108
An organized, overnight, guided tour where you stayed in a single location	7.4%	4.2%	7.1%	103
To a casino	5.4%	2.5%	5.2%	104
Caribbean ocean cruise	2.8%	0.0%	2.6%	108
To a factory	2.8%	1.2%	2.7%	105
To a winery	2.7%	0.0%	2.5%	108
Ocean cruise - Other	2.1%	0.0%	2.0%	108
In the air as a pilot or passenger of an airplane or helicopter	1.5%	0.0%	1.4%	108
Cruise on another lake or river	1.3%	0.0%	1.2%	108
Some other type of cruise	1.1%	0.0%	1.0%	108
Alaskan ocean cruise	1.0%	0.0%	1.0%	108
Submarine cruise	0.2%	0.0%	0.2%	108
Great Lakes cruise	0.1%	0.0%	0.1%	108
Cruise on the St. Lawrence River	0.1%	0.0%	0.1%	108

Benefits Sought While on Vacation

As with most Canadian Pleasure Travelers, Manitoba residents tend to take vacations to get a break from their day-to-day environment, relax and relieve stress, create lasting memories and to enrich their relationships with family members. However, those who took trips outside of the province 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 the province are more likely to prefer vacations that offer solitude and allow them to enrich their relationships with family members. Within-province travelers also prefer vacations that are physically challenging, allow them to be pampered and provide them with stories to share back home.

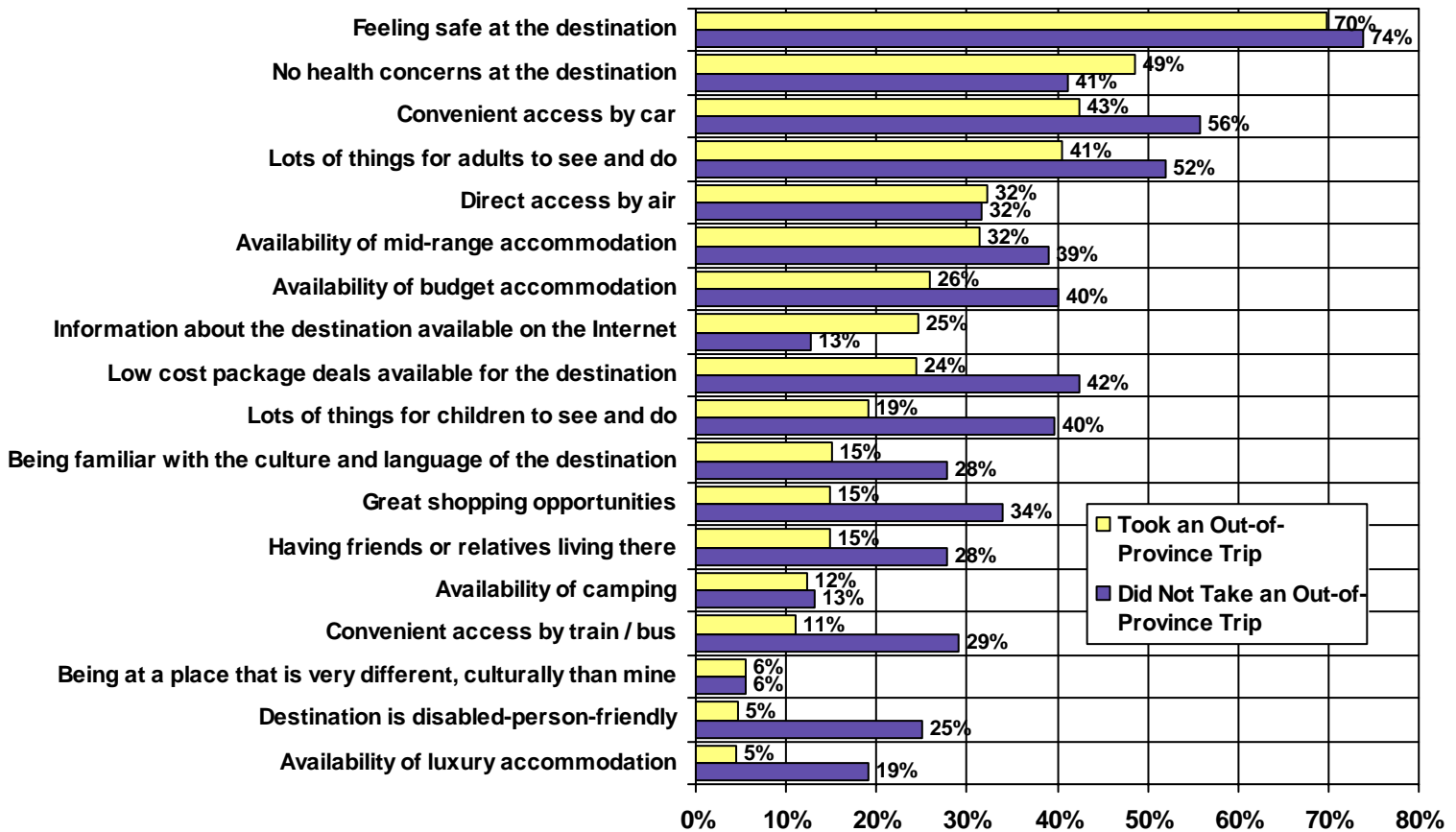
Fig.11 Benefits Sought While on Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, Manitoba Pleasure Travelers consider it important that they feel safe at a destination. However, those who took trips outside of the province are more likely to value destinations that have information available on the Internet. By contrast, those who only took trips within Manitoba consider it more important that a destination is conveniently accessible by car, bus or train, has a familiar culture and language, has lots of activities for children to see and do and has family or friends living nearby. Within province travelers are also more likely to look for accommodations that are suitable for persons with disabilities.

Fig. 12 Importance of Destination Attributes (% Rating Each Attribute as "Highly Important")



How Destinations Are Selected

Similar to the average Canadian Pleasure Traveler, Manitoba Pleasure Travelers most often begin planning vacations with a particular destination in mind. However, for winter trips, those who took trips outside of the province are more likely to begin planning by first considering what type of experiences they would to have, while those who travel exclusively within Manitoba begin planning by considering what types of activities they would like to do while on vacation.

Fig. 13 How Destinations Are Selected (Summer and Winter Vacations)

	Took a Pleasure Trip Outside of Manitoba	Only Took Pleasure Trips Within Manitoba	Total Pleasure Travelers in Manitoba	Index
Size of Market	550,544	44,514	595,057	100
Summer				
Started with a desired destination in mind	48.4%	37.7%	47.6%	102
Started by considering specific activities wanted to do	12.1%	12.5%	12.2%	100
Started with a certain type of vacation experience in mind	23.3%	19.0%	22.9%	101
Looked for packaged deals - no destination in mind	0.8%	1.9%	0.9%	90
Considered something else first	4.2%	2.6%	4.1%	103
Don't know / Other	11.2%	26.2%	12.3%	91
Winter				
Started with a desired destination in mind	53.2%	42.4%	52.7%	101
Started by considering specific activities wanted to do	12.2%	20.6%	12.6%	97
Started with a certain type of vacation experience in mind	19.3%	15.6%	19.1%	101
Looked for packaged deals - no destination in mind	4.3%	0.0%	4.1%	105
Considered something else first	3.3%	4.2%	3.4%	99
Don't know / Other	7.7%	17.2%	8.1%	94

Trip Planning and Information Sources Consulted

Similar to the average Canadian Pleasure Traveler, Manitoba Pleasure Travelers are typically responsible for planning their trips either on their own (38.1%) or with someone else (19.8%). When making vacation plans, those who travel outside of the province are more likely to consult a wider range of information sources to plan their trips. Relative to those who exclusively traveled within the province, Manitoba residents who took an out-of-province trip are especially likely to obtain travel information from the Internet, newspaper and magazine articles and advertising, travel agents and automotive clubs. They are also more likely to make use of official tourism guide and brochures from states and provinces and information centers as well as soliciting advice from others.

Fig. 14 Who Plans Vacations and Information Sources Consulted

		Took a Pleasure Trip Outside of Manitoba	Only Took Pleasure Trips Within Manitoba	Total Pleasure Travelers in Manitoba	Index
Size of Market		550,544	44,514	595,057	100
Who Plans Trips?	Respondent plans trips	38.1%	38.2%	38.1%	100
	Trip planning a shared responsibility	20.1%	16.6%	19.8%	101
	Someone else plans trips	41.8%	45.2%	42.1%	99
Information Sources Consulted	An Internet website	62.9%	24.0%	60.0%	105
	Past experience / Been there before	55.6%	41.8%	54.6%	102
	Advice of others / Word-of-mouth	51.0%	25.1%	49.1%	104
	Maps	36.6%	15.2%	35.0%	104
	A travel agent	31.3%	4.8%	29.3%	107
	Official travel guides or brochures from state / province	24.6%	12.0%	23.7%	104
	Visitor information centres	20.5%	6.1%	19.5%	105
	An auto club such as CAA	19.3%	3.6%	18.2%	106
	Articles in newspapers / magazines	18.8%	2.8%	17.6%	107
	Advertisements in newspapers / magazines	12.6%	2.2%	11.8%	106
	Travel guide books such as Fodor's	8.1%	4.2%	7.8%	104
	Travel information received in the mail	6.6%	0.8%	6.2%	107
	Programs on television	5.5%	2.1%	5.3%	105
	Advertisements on television	3.9%	2.1%	3.8%	103
	An electronic newsletter or magazine received by e-mail	3.5%	0.0%	3.2%	108
	Visits to trade, travel or sports shows	1.3%	0.0%	1.2%	108

Use of the Internet to Plan and Arrange Trips

Manitoba residents who took a trip outside of the province are below-average users of the Internet to plan (58.4%) and book travel (35.1%). Those who only took pleasure trips within the province generally do not use the Internet to plan (20.4%) or book (3.1%) travel. The majority of those who took an out-of-province trip use the websites of hotels or resorts or the website of a specific country / region or city. However, out-of-province travelers are much more likely than within-province travelers to consult hotel or resort websites, travel planning / booking websites (e.g., Expedia) and airline websites. By contrast, those who only took pleasure trips in Manitoba are most likely to visit the website of a specific country, region or city. As with most Canadian Pleasure Travelers, Manitoba residents who traveled outside of the province most often use the Internet to purchase airline tickets and accommodation. However, they are also more likely than within-province travelers to use the Internet to purchase vacation packages, book car rentals and purchase fares for travel by rail, bus or boat.

Fig. 15 Use of the Internet to Plan and Book Travel

		Took a Pleasure Trip Outside of Manitoba	Only Took Pleasure Trips Within Manitoba	Total Pleasure Travelers in Manitoba	Index
	Size of Market	550,544	44,514	595,057	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	41.8%	79.6%	44.6%	94
	Uses Internet to plan trips only	23.2%	17.3%	22.7%	102
	Uses Internet to book part of trip	35.1%	3.1%	32.7%	107
Types of Websites Consulted	A website of a hotel or resort	54.9%	36.1%	54.4%	101
	An airline website	52.4%	0.0%	51.0%	103
	A tourism website of a country / region / city	45.9%	58.4%	46.2%	99
	A travel planning / booking website	45.7%	0.0%	44.4%	103
	A website of an attraction	30.0%	20.2%	29.7%	101
	Some other website	25.6%	27.2%	25.7%	100
	A cruise line website	5.1%	0.0%	4.9%	103
	A motorcoach website	1.7%	0.0%	1.6%	103
Parts of Trips Booked Over The Internet	Air tickets	79.5%	0.0%	78.9%	101
	Accommodation	65.8%	77.1%	65.9%	100
	Car rental	30.1%	0.0%	29.9%	101
	Tickets or fees for specific activities or attractions	22.2%	22.9%	22.2%	100
	A package containing two or more items	9.2%	0.0%	9.1%	101
	Tickets for rail, bus or boat / ship fares	7.9%	0.0%	7.9%	101
	Other	4.6%	0.0%	4.5%	101

Media Consumption Habits

Manitoba residents who took trips outside of the province are much more likely to consume travel media (e.g., travel sections of newspapers, travel magazines, travel websites) than those who exclusively traveled within Manitoba. Out-of-province travelers may be effectively reached through city lifestyle magazines, business, finance and investing magazines and professional sports media. They most often listen to modern and alternative rock, adult contemporary radio stations. Those who only travel in Manitoba are more likely to read home-related magazines (e.g., home & garden, craft, antiques & collectibles) and listen to country music radio stations.

Fig. 16 Media Consumption Habits

		Took a Pleasure Trip Outside of Manitoba	Only Took Pleasure Trips Within Manitoba	Total Pleasure Travelers in Manitoba	Index
	Size of Market	550,544	44,514	595,057	100
Newspaper Readership	Reads daily newspaper	88.3%	84.7%	88.0%	100
	Reads weekend edition of newspaper	88.6%	85.6%	88.4%	100
	Reads local neighbourhood or community newspapers	61.4%	70.2%	62.1%	99
	Reads other types of newspapers	16.0%	15.1%	16.0%	100
	Frequently or occasionally reads travel section of daily newspaper	45.8%	28.3%	44.5%	103
	Frequently or occasionally reads travel section of weekend newspaper	50.8%	29.9%	49.2%	103
Types of Magazines Read (Top 5 Indexed)	Business, finance and investing	12.9%	0.0%	11.9%	108
	Magazines about your city	7.5%	1.3%	7.1%	107
	Travel (e.g., Condé Nast)	8.4%	2.9%	8.0%	105
	Professional sports	11.3%	4.7%	10.8%	105
	Computers, electronics and technology	10.5%	4.5%	10.0%	104
Type of Television Programs Watched (Top 5 Indexed)	Shopping channels	4.7%	0.9%	4.4%	106
	Travel shows	29.6%	11.1%	28.2%	105
	Late night talk shows	24.8%	14.9%	24.1%	103
	Biography	41.6%	28.2%	40.6%	102
	Science fiction / Fantasy shows	22.1%	15.0%	21.5%	102
Type of Radio Programs Listened To (Top 5 Indexed)	Multicultural	5.6%	1.6%	5.3%	106
	All sports	9.7%	4.2%	9.3%	104
	Soft music / Adult contemporary	20.6%	10.9%	19.8%	104
	Classical music	14.0%	8.1%	13.6%	103
	Modern rock / Alternative rock	40.8%	28.4%	39.8%	102
Types of Websites Visited (Top 5 Indexed)	Network news sites (e.g., CBC, CNN)	34.3%	14.7%	33.0%	104
	Travel	50.7%	26.8%	49.1%	103
	Newspaper sites	30.0%	17.3%	29.1%	103
	Sports	27.6%	16.8%	26.9%	103
	Magazine sites	14.5%	9.4%	14.2%	102

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	