

CANADIAN TRAVEL MARKET

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

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, 59.6% (3,538,204) of adult, Quebec residents took an out-of-province, overnight trip (for any purpose). 89.8% (3,176,237) of those who took a trip outside of Quebec report that they took at least one out-of-province, pleasure trip during the past two years. 52.1% of the out-of-province pleasure trips taken by Quebec residents were to other Canadian destinations, while 56.7% of the out-of-province pleasure trips were to destinations outside of Canada.

Quebec residents who took an out-of-province pleasure trip are similar to those who only took pleasure trips within the province in terms of gender, age and marital status. However, out-of-province pleasure travelers are more likely to have a university degree (34.5% vs. 15.9%) and tend to have higher average household incomes (\$67,732 vs. \$54,638). This suggests that those who took trips outside of the province may have more discretionary income for pleasure travel.

83.4% of those who took a trip outside of Quebec also took a trip within the province during the last two years. In terms of out-of-province Canadian travel, 58.2% took an out-of-province trip to an adjacent province while 31.4% took a trip to a non-adjacent province or region. In terms of out-of-country travel, Quebecers were most likely to have taken trips to the United States (53.0%). However, 23.5% took a trip to the Caribbean and 25.0% took a trip to an overseas destination during the last two years.

Quebec residents who traveled outside of the province are more active in culture and entertainment pursuits while on trips and were especially likely to have attended live art performances (e.g., high art performances, live theatre), sporting events (e.g., professional sporting events) and literary or film festivals and to have visited historical sites, museums and art galleries. They were also more likely to have taken part in warm-weather, resort-based activities (e.g., swimming in the ocean, sailing and surfing) and to have gone skiing (e.g., cross-country skiing, downhill skiing), golfing, cycling and hiking, climbing and paddling while on trips. By contrast, those who only took pleasure trips within the province were more likely to have gone hunting and fishing while on trips.

Out-of-province travelers prefer vacations that provide intellectual stimulation, learning opportunities and novelty. By contrast, those who did not travel outside of the province are more likely to take vacations that offer solitude, allow them to keep family ties alive, have no fixed schedule and offer a familiar culture and language.

Out-of-province travelers may be most effectively reached through travel media as well as business, finance and investing magazines and news websites. They tend to listen to jazz / big band, multicultural and classical music radio stations.

Out-of-Province Travel by Residents of Quebec

Market Incidence

Over the last two years, 59.6% (3,538,204) of adult, Quebec residents took an out-of-province, overnight trip (for any purpose). 89.8% (3,176,237) of those who took a trip outside of Quebec report that they took at least one out-of-province, “pleasure trip” during the past two years.

Overall, 75.7% of those who took a pleasure trip (i.e., Pleasure Travelers) report taking at least one pleasure trip outside of the province. Other than the Atlantic Region, Quebec residents were the least likely to take pleasure trips outside of their province during the last two years. (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 in this report series).

52.1% of the out-of-province pleasure trips taken by Quebec residents were to other Canadian destinations, while 56.7% of the out-of-province pleasure trips were to destinations outside of Canada.

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

	Residents of Quebec
Number Taking a Trip Outside of the Province (Any Purpose) ²	3,538,204
Percent of Provincial Population	59.6%
Number Taking a Pleasure Trip Outside of Province ³	3,176,237
Percent of Pleasure Travelers in Province ⁴	75.7%
Percent Taking a Pleasure Trip to Another Canadian Destination Outside of Province ⁵	52.1%
Percent Taking a Pleasure Trip Outside of Canada ⁶	56.7%

- 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 - This row reports the number of Quebec residents who took at least one overnight trip outside Quebec in the last two years for any purpose.
- 3 - This row reports the number of Quebec 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 Quebec “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

Quebec residents who took an out-of-province pleasure trip are similar to those who only took pleasure trips within the province in terms of gender, age and marital status. However, out-of-province pleasure travelers are more likely to have a university degree (34.5%) than those who only traveled within the province (15.9%). Out-of-province travelers also have higher average household incomes (\$67,732 vs. \$54,638). This suggests that those who tend to take trips exclusively within the province may lack sufficient discretionary income for out-of-province travel.

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

Attribute	Size of Market	Took a Pleasure Trip Outside of Quebec	Only Took Pleasure Trips Within Quebec ¹	Total Pleasure Travelers in Quebec	Index ²
		3,176,237	1,022,335	4,198,572	100
Gender	Male	49.1%	49.5%	49.2%	100
	Female	50.9%	50.5%	50.8%	100
Age of Respondent	18 to 24	12.5%	10.7%	12.1%	104
	25 to 34	19.3%	23.0%	20.2%	96
	35 to 44	20.9%	18.7%	20.4%	103
	45 to 54	19.6%	22.3%	20.2%	97
	55 to 64	15.5%	14.8%	15.3%	101
	65 Plus	12.3%	10.4%	11.8%	104
Average Age		44.5	44.0	44.4	N/A
Marital Status	Not married	37.4%	36.6%	37.2%	101
	Married	62.6%	63.4%	62.8%	100
Parental Status	No children under 18	75.6%	72.4%	74.8%	101
	Children under 18	24.4%	27.6%	25.2%	97
Education	High school or less	30.7%	46.5%	34.6%	89
	Some post-secondary	9.1%	8.1%	8.9%	103
	Post-secondary diploma/certificate	25.7%	29.5%	26.7%	97
	University degree	34.5%	15.9%	29.9%	115
Household Income	Under \$20,000	6.6%	9.2%	7.2%	91
	\$20,000 to \$39,999	17.9%	20.2%	18.4%	97
	\$40,000 to \$59,999	17.8%	27.0%	20.0%	89
	\$60,000 to \$79,999	16.2%	15.0%	15.9%	102
	\$80,000 to \$99,999	12.4%	9.4%	11.6%	106
	\$100,000 or more	18.4%	6.7%	15.6%	118
	Not stated	10.7%	12.7%	11.2%	96
Average Household Income		\$67,732	\$54,638	\$64,596	N/A

- 1 - "Only Took Pleasure Trips Within Quebec" 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)

83.4% of those who took a trip outside of Quebec also took a trip within the province during the last two years. In terms of out-of-province Canadian travel, 58.2% took an out-of-province trip to an adjacent province with Ontario (54.8%) by far the most common destination. 31.4% took a trip to a non-adjacent province or region; most often British Columbia (9.9%), Alberta (7.7%) and Prince Edward Island (8.1%).

In terms of out-of-country travel, out-of-province travelers were most likely to have taken trips to the United States (53.0%). However, 23.5% took a trip to the Caribbean and 25.0% took a trip to an overseas destination during the last two years. Only 10.2% took a trip to Mexico during this same time period.

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

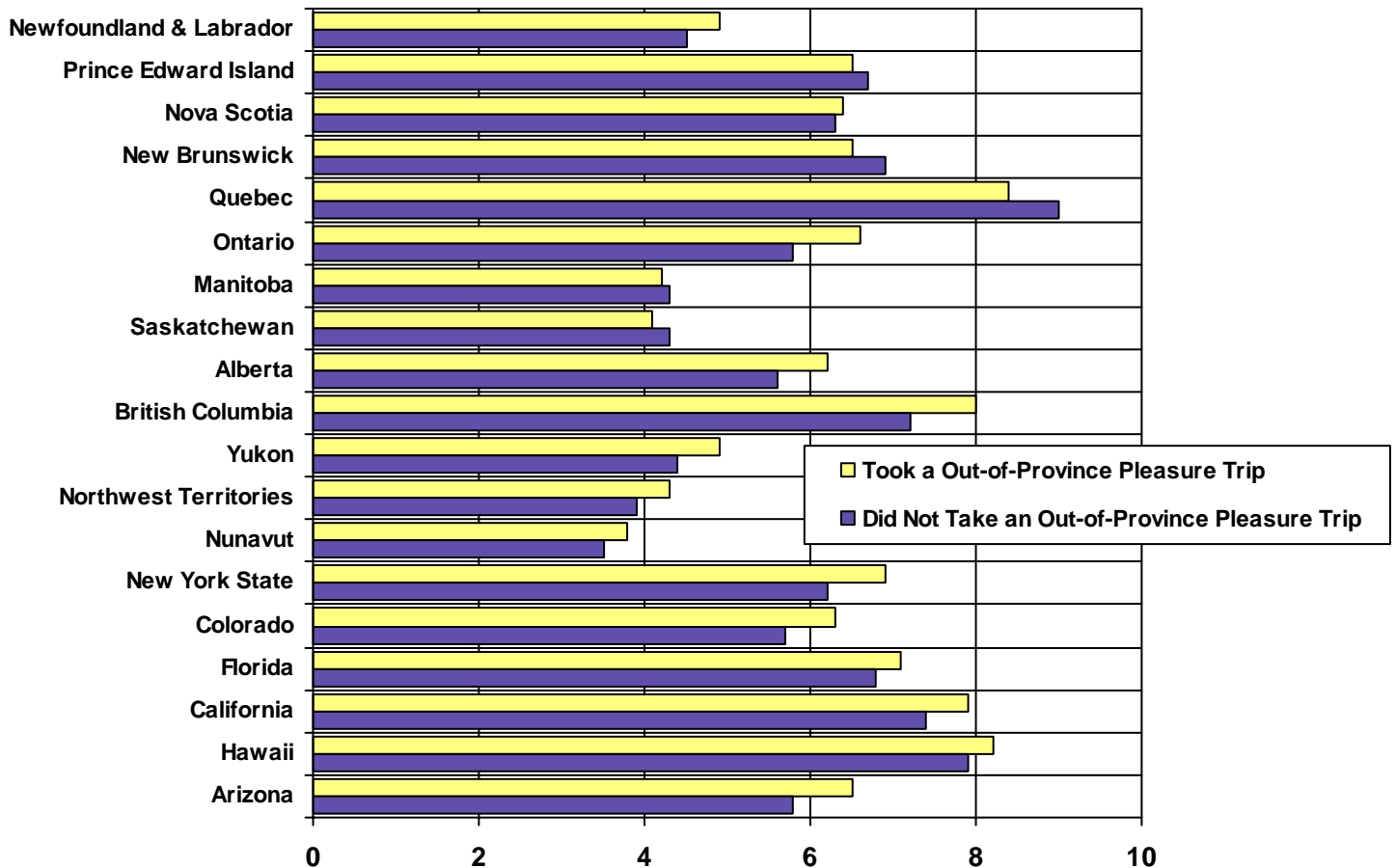
	Took a Pleasure Trip Outside of Quebec	Only Took Pleasure Trips Within Quebec	Total Pleasure Travelers in Quebec
Size of Market	3,176,237	1,022,335	4,198,572
Canada	94.5%	100.0%	95.9%
Took a trip within own province / region	83.4%	100.0%	87.5%
Took a trip to an adjacent province / region	58.2%	0.0%	44.0%
Took a trip to non-adjacent province / region	31.4%	0.0%	23.8%
Newfoundland and Labrador	2.2%	0.0%	1.6%
Prince Edward Island	8.1%	0.0%	6.1%
New Brunswick	8.5%	0.0%	6.4%
Nova Scotia	21.2%	0.0%	16.0%
Quebec	83.4%	100.0%	87.5%
Ontario	54.8%	0.0%	41.5%
Manitoba	2.6%	0.0%	1.9%
Saskatchewan	2.6%	0.0%	2.0%
Alberta	7.7%	0.0%	5.8%
British Columbia	9.9%	0.0%	7.5%
Yukon	0.5%	0.0%	0.4%
Northwest Territories	0.2%	0.0%	0.1%
Nunavut	0.6%	0.0%	0.5%
United States	53.0%	0.0%	40.1%
Mexico	10.2%	0.0%	7.7%
Caribbean	23.5%	0.0%	17.8%
All other destinations	25.0%	0.0%	18.9%

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.

Quebecers who took an out-of-province trip have a more favourable impression of many of the other destinations in Canada and especially British Columbia, Ontario and Alberta. They also perceive the six U.S. reference states to be more appealing travel destinations than do those who did not take a trip out-of-province. On the other hand, those who traveled exclusively within the province tend to have a more favourable impression of Quebec. It is not possible to determine whether these attitudinal differences are the result of the travel activities of out-of-province travelers or a factor which contributes to the desire to travel out-of-province.

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

Quebec residents who took a trip outside of the province are more likely to participate in culture and entertainment pursuits while on trips than those who only took trips within the province. 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 Quebec, out-of-province travelers were much more likely to have attended live art performances (e.g., high art performances, live theatre), sporting events (e.g., professional sporting events) and literary or film festivals and to have visited historical sites, museums and art galleries while on trips. They were also more likely to have gambled in a casino, taken part in a wine, beer or food tasting and to have visited a science and technology exhibit 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 Quebec	Only Took Pleasure Trips Within Quebec	Total Pleasure Travelers in Quebec	Index
Size of Market	3,176,237	1,022,335	4,198,572	100
Shopping & Dining	84.6%	75.5%	82.4%	103
Historical Sites, Museums & Art Galleries	58.3%	38.7%	53.5%	109
Theme Parks & Exhibits	37.8%	34.7%	37.0%	102
Fairs & Festivals	34.0%	26.7%	32.2%	106
Musical Concerts, Festivals & Attractions	31.9%	29.1%	31.2%	102
Wine, Beer & Food Tastings	29.3%	16.1%	26.1%	112
Casinos	22.5%	14.0%	20.4%	110
Science & Technology Exhibits	21.9%	12.5%	19.6%	112
Live Theatre	21.5%	16.1%	20.1%	107
Garden Theme Attractions	19.6%	15.1%	18.5%	106
Agro-Tourism	16.8%	16.8%	16.8%	100
Comedy Festivals & Clubs	16.0%	15.4%	15.9%	101
High Art Performances	15.0%	5.5%	12.7%	118
Spas	12.8%	8.2%	11.7%	110
Professional Sporting Events	10.3%	7.8%	9.7%	106
Amateur Tournaments	9.4%	9.7%	9.5%	99
Aboriginal Cultural Experiences	8.6%	5.2%	7.8%	111
Participatory Historical Activities	7.7%	6.3%	7.4%	105
Equestrian & Western Events	5.1%	4.2%	4.9%	104
Literary & Film Festivals	4.4%	0.8%	3.5%	125
National & International Sporting Events	2.1%	1.6%	1.9%	106

Culture and Entertainment Activities Pursued While Not on Trips

Quebecers 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 were especially likely to patronize local live art performances (e.g., the opera, ballet, classical music concerts, live theatre, jazz clubs), to have gambled in a local casino and to have attended a professional sporting event. They are also more likely than those who did not take a trip outside of the province to visit local museums and art galleries. In part, this reflects the fact that out-of-province travelers are better educated and have higher household incomes.

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

	Took a Pleasure Trip Outside of Quebec	Only Took Pleasure Trips Within Quebec	Total Pleasure Travelers in Quebec	Index
Size of Market	3,176,237	1,022,335	4,198,572	100
Going out to eat in restaurants	93.0%	91.0%	92.5%	101
Going to festivals or fairs	60.7%	58.0%	60.0%	101
Going to historic sites or heritage buildings	42.1%	32.9%	39.9%	106
Going to botanical gardens	39.1%	29.1%	36.7%	107
Going to art galleries or art shows	39.0%	26.8%	36.0%	108
Going to live theatre	37.7%	30.6%	36.0%	105
Going to amateur sporting events	34.6%	35.3%	34.8%	100
Going dancing	34.3%	32.1%	33.8%	102
Going to museums	34.0%	17.8%	30.0%	113
Going to zoos or aquariums	33.5%	32.1%	33.1%	101
Going to pick-your-own farms or farmers' market	32.2%	34.9%	32.9%	98
Going to amusement or theme parks	30.0%	25.2%	28.8%	104
Going to bars with live pop or rock bands	27.2%	23.7%	26.4%	103
Going to professional sporting events	26.8%	19.6%	25.1%	107
Going to rock music concerts	20.8%	17.2%	19.9%	104
Going to classical music concerts	19.9%	13.4%	18.3%	109
Going to day spas	18.4%	9.4%	16.2%	114
Going to gamble in casinos	13.1%	8.5%	12.0%	109
Staying overnight in a hotel or B&B in own city	10.6%	9.5%	10.3%	103
Going to jazz clubs	9.4%	2.2%	7.7%	123
Going to the ballet	8.9%	3.9%	7.7%	116
Going to the opera	8.9%	2.6%	7.3%	121
Going to rodeos	3.3%	5.1%	3.7%	88

Outdoor Activities Pursued While on Trips

Quebec residents who took a trip outside of the province were 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 gone skiing (e.g., cross-country skiing, downhill skiing), exercising or jogging, golfing, cycling and hiking, climbing and paddling while on trips. By contrast, those who only took pleasure trips within the province were more likely to have gone hunting and fishing and to have ridden a snowmobile or ATV while on a trip.

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 Quebec	Only Took Pleasure Trips Within Quebec	Total Pleasure Travelers in Quebec	Index
Size of Market	3,176,237	1,022,335	4,198,572	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	58.0%	25.4%	50.1%	116
Wildlife Viewing	40.9%	33.0%	39.0%	105
Boating & Swimming (e.g., motorboating, swimming in lakes)	39.2%	35.1%	38.2%	103
Hiking, Climbing & Paddling	38.0%	26.9%	35.3%	108
Fishing	22.2%	30.3%	24.2%	92
Sports & Games (e.g., tennis, board games)	20.2%	16.7%	19.4%	104
Cycling	18.4%	14.2%	17.4%	106
Skating (e.g., ice skating, rollerblading)	18.2%	12.0%	16.7%	109
Cross-country Skiing & Snowshoeing	18.1%	12.8%	16.8%	108
Downhill Skiing & Snowboarding	15.7%	8.8%	14.0%	112
Golfing	14.8%	8.2%	13.2%	112
Exercising & Jogging	13.1%	5.8%	11.3%	116
Snowmobiling & ATViing	11.0%	18.0%	12.7%	87
Team Sports (e.g., hockey, baseball)	8.8%	7.1%	8.4%	105
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	7.4%	1.5%	5.9%	124
Hunting	5.9%	8.5%	6.5%	90
Horseback Riding	4.1%	2.8%	3.8%	109
Motorcycling	4.1%	2.3%	3.7%	112
Freshwater Scuba & Snorkeling	2.8%	0.4%	2.2%	126
Wilderness Activities (e.g., wilderness skills course)	2.2%	1.9%	2.2%	103
Extreme Air Sports (e.g., parachuting)	1.6%	0.6%	1.3%	117

Outdoor Activities Pursued While Not on Trips

While NOT traveling, Quebec residents who traveled outside of the province tend to be more active in outdoor activities that are typically more expensive or require special equipment (e.g., downhill skiing, golfing, sailing and other boating). They are also more likely to participate in many of the more strenuous outdoor activities (e.g., jogging, team sports, rollerblading, skateboarding). On the other hand, those who only took trips within the province are more likely to go hunting or fishing or ride ATV's or snowmobiles while not traveling. Many of the activities more likely to be undertaken by within-province travelers are more common in rural areas or small towns. This may suggest that those who live in smaller towns or rural areas are less likely to take trips outside of Quebec than those who live in larger urban centers.

Fig. 8 Outdoor Activities Pursued While NOT on Trips

	Took a Pleasure Trip Outside of Quebec	Only Took Pleasure Trips Within Quebec	Total Pleasure Travelers in Quebec	Index
Size of Market	3,176,237	1,022,335	4,198,572	100
Day outing to a park	63.0%	57.4%	61.6%	102
Hiking	60.6%	60.3%	60.5%	100
Swimming	57.9%	49.5%	55.9%	104
Picnicking	56.9%	54.6%	56.4%	101
Cycling	56.2%	56.4%	56.2%	100
Exercising at home or at a fitness club	55.5%	46.9%	53.4%	104
Gardening	54.3%	55.8%	54.6%	99
Camping	36.0%	36.4%	36.1%	100
Ice-skating	35.7%	32.9%	35.0%	102
Fishing	27.7%	36.2%	29.8%	93
Playing racquet sports (e.g., tennis or badminton)	24.2%	24.1%	24.2%	100
Golfing	23.7%	17.8%	22.2%	106
Playing team sports	23.7%	19.8%	22.7%	104
Cross-country skiing	23.2%	19.9%	22.4%	104
Downhill skiing	22.4%	13.8%	20.3%	110
Jogging	20.6%	16.3%	19.5%	105
Rollerblading	20.5%	17.3%	19.7%	104
Sailing or other boating	18.3%	11.7%	16.7%	110
Canoeing or kayaking	17.5%	14.4%	16.7%	104
Riding an all-terrain vehicle (ATV)	14.1%	21.1%	15.8%	89
Snowmobiling	8.9%	16.8%	10.8%	82
Hunting	8.7%	11.2%	9.3%	94
Horseback riding	7.7%	5.7%	7.2%	107
Snowboarding	5.8%	5.4%	5.7%	102
Skateboarding	1.3%	0.3%	1.0%	122

Accommodation Stayed In While on Trips

Those who took a 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 Quebec were also more likely to have stayed in many of the more exotic accommodation types (e.g., wine school, health spa, remote or fly-in wilderness lodge). On the other hand, those who only took within province trips predominantly stayed in public or private campgrounds.

Fig. 9 Accommodation Stayed In While on Trips

	Took a Pleasure Trip Outside of Quebec	Only Took Pleasure Trips Within Quebec	Total Pleasure Travelers in Quebec	Index
Size of Market	3,176,237	1,022,335	4,198,572	100
Seaside Resort	30.0%	4.3%	23.7%	126
Lakeside / Riverside Resort	29.0%	17.8%	26.3%	110
A Public Campground in a National, State, Provincial or Municipal Park	26.0%	22.9%	25.3%	103
A Private Campground	20.7%	18.7%	20.2%	102
Ski Resort or Mountain Resort	12.0%	4.5%	10.2%	118
Health Spa	12.0%	9.0%	11.2%	107
Country Inn or Resort with Gourmet Restaurant	9.5%	10.0%	9.7%	99
Wilderness Lodge You Can Drive to by Car	8.7%	9.7%	8.9%	97
A Camp Site in a Wilderness Setting (Not a Campground)	7.9%	7.4%	7.8%	102
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	4.5%	2.7%	4.0%	110
Farm or Guest Ranch	1.9%	1.9%	1.9%	100
Remote or Fly-In Wilderness Lodge	1.3%	0.4%	1.1%	119
On a Houseboat	1.0%	0.3%	0.8%	119
Cooking School	0.5%	0.2%	0.5%	120
Wine Tasting School	0.2%	0.1%	0.2%	123
Remote or Fly-In Wilderness Outpost	0.1%	0.2%	0.1%	87

Tours and Cruises Taken During Past Two Years

Quebec 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 did not travel outside of the province. Sameday tours (both organized and self-guided) and city tours were the most popular. However, relative to those who did not travel outside of the province, out-of-province travelers were especially likely to have taken city tours, multi-location and single location guided tours, tours of casinos and wineries and cruises (e.g., Caribbean cruises, Alaskan cruises). Those who only took trips within Quebec were most likely to have taken self-guided tours, scenic drives in the country-side and wilderness tours.

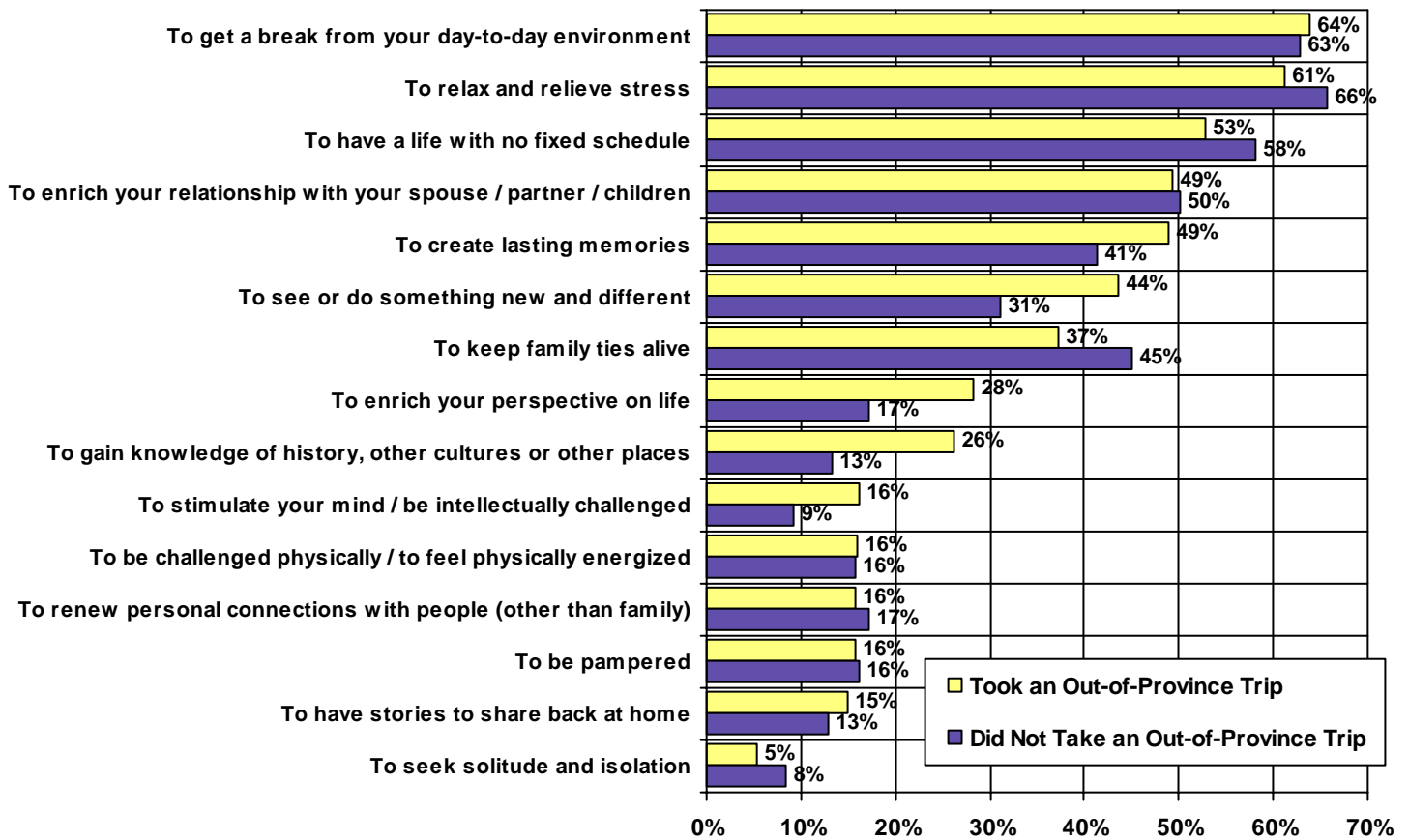
Fig. 10 Tours and Cruises Taken During Past Two Years

	Took a Pleasure Trip Outside of Quebec	Only Took Pleasure Trips Within Quebec	Total Pleasure Travelers in Quebec	Index
Size of Market	3,176,237	1,022,335	4,198,572	100
A self-guided, sameday tour while on an overnight trip	30.0%	16.4%	26.7%	112
A self-guided, overnight tour where you stayed in different locations	26.3%	13.8%	23.3%	113
Around the countryside - scenic drives	23.4%	14.5%	21.2%	110
Around the city	21.5%	8.7%	18.4%	117
An organized, sameday, guided tour while on an overnight trip	20.7%	8.1%	17.6%	117
Wilderness tour	15.9%	12.2%	15.0%	106
An organized, overnight, guided tour where you stayed in different locations	14.8%	4.4%	12.3%	121
On the water (sightseeing cruise)	14.1%	6.9%	12.3%	114
An organized, overnight, guided tour where you stayed in a single location	9.4%	4.4%	8.1%	115
Some other type of tour	7.5%	4.1%	6.6%	112
To a casino	7.2%	2.6%	6.1%	118
Caribbean ocean cruise	6.9%	0.0%	5.3%	129
To a winery	6.2%	1.5%	5.0%	122
Cruise on the St. Lawrence River	5.6%	5.8%	5.6%	99
Ocean cruise - Other	3.6%	0.0%	2.8%	128
Cruise on another lake or river	2.9%	3.1%	3.0%	99
In the air as a pilot or passenger of an airplane or helicopter	2.1%	0.3%	1.7%	127
To a factory	1.9%	0.8%	1.6%	117
Some other type of cruise	1.5%	0.6%	1.3%	118
Great Lakes cruise	1.0%	0.7%	0.9%	109
Alaskan ocean cruise	0.9%	0.0%	0.7%	125
Submarine cruise	0.1%	0.0%	0.1%	132

Benefits Sought While on Vacation

As with most Canadian Pleasure Travelers, Quebec residents tend to take vacations to get a break from their day-to-day environment, relax and relieve stress and have no fixed schedule. 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, allow them to keep family ties together and have no fixed schedule. Clearly, those who do not travel outside of the province prefer simpler, unstructured vacations with other family members.

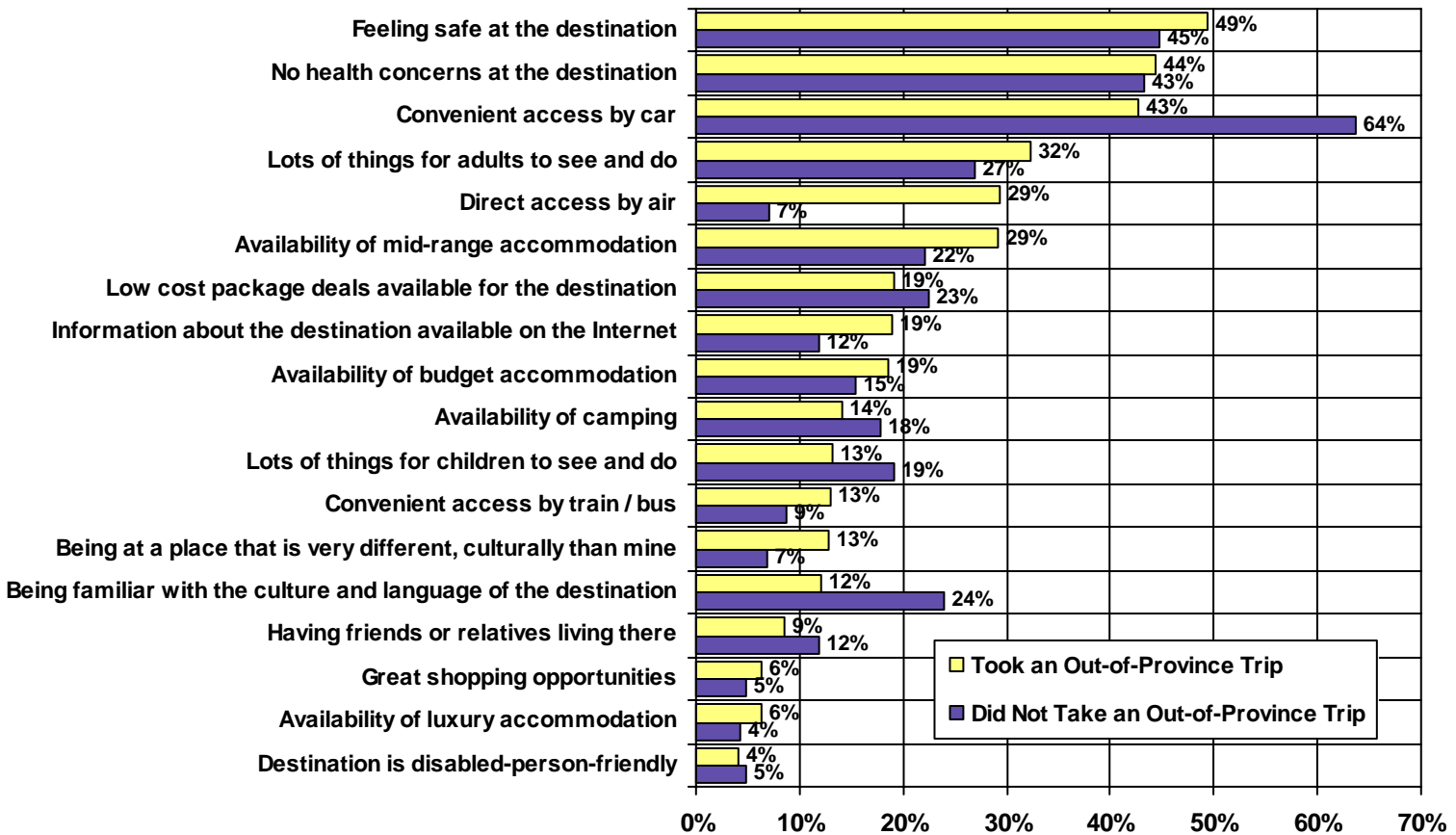
Fig.11 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, Quebec 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 a distinct culture, offer luxury or mid-range priced accommodation, have information available on the Internet and are directly accessible by air. By contrast, those who only took trips within Quebec consider it more important that a destination has a familiar culture and language, camping available, lots of activities for children to see and do, family or friends living nearby and low-cost, vacation packages available.

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



How Destinations Are Selected

Similar to the average Canadian Pleasure Traveler, Quebec Pleasure Travelers most often begin planning vacations with a particular destination in mind. However, those who took trips outside of the province are more likely to report that they begin their trip planning with a particular destination in mind than do those who only took trips within the province.

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

	Took a Pleasure Trip Outside of Quebec	Only Took Pleasure Trips Within Quebec	Total Pleasure Travelers in Quebec	Index
Size of Market	3,176,237	1,022,335	4,198,572	100
Summer				
Started with a desired destination in mind	45.2%	31.3%	41.8%	108
Started by considering specific activities wanted to do	18.7%	20.0%	19.0%	98
Started with a certain type of vacation experience in mind	22.9%	29.0%	24.4%	94
Looked for packaged deals - no destination in mind	1.3%	1.2%	1.3%	103
Considered something else first	4.4%	7.3%	5.1%	86
Don't know / Other	7.5%	11.3%	8.4%	89
Winter				
Started with a desired destination in mind	41.8%	37.1%	41.0%	102
Started by considering specific activities wanted to do	18.9%	17.9%	18.7%	101
Started with a certain type of vacation experience in mind	18.9%	20.6%	19.2%	98
Looked for packaged deals - no destination in mind	5.3%	1.3%	4.6%	116
Considered something else first	6.5%	10.8%	7.3%	89
Don't know / Other	8.6%	12.3%	9.3%	93

Trip Planning and Information Sources Consulted

Similar to the average Canadian Pleasure Traveler, Quebec Pleasure Travelers are typically responsible for planning their trips either on their own (45.8%) or with someone else (12.7%). When making vacation plans, those who traveled outside of the province are more likely to consult a wider range of information to plan their trips. Relative to those who only traveled within the province, Quebec residents who took an out-of-province trip are especially likely to obtain travel information from the Internet, travel guidebooks such as Fodor's, travel agents, maps and automotive clubs. On the other hand, those who only took pleasure trips within the province are more likely to obtain travel information from television advertising.

Fig. 14 Who Plans Vacations and Information Sources Consulted

		Took a Pleasure Trip Outside of Quebec	Only Took Pleasure Trips Within Quebec	Total Pleasure Travelers in Quebec	Index
Size of Market		3,176,237	1,022,335	4,198,572	100
Who Plans Trips?	Respondent plans trips	45.8%	37.3%	43.9%	104
	Trip planning a shared responsibility	12.7%	8.8%	11.9%	107
	Someone else plans trips	41.5%	53.9%	44.3%	94
Information Sources Consulted	An Internet website	65.8%	44.5%	60.9%	108
	Advice of others / Word-of-mouth	50.5%	46.3%	49.5%	102
	Past experience / Been there before	42.1%	40.4%	41.7%	101
	A travel agent	41.5%	2.4%	32.7%	127
	Official travel guides or brochures from state / province	34.5%	23.8%	32.1%	108
	Visitor information centres	28.0%	22.0%	26.6%	105
	Maps	27.4%	13.4%	24.2%	113
	Articles in newspapers / magazines	27.2%	16.6%	24.8%	110
	Advertisements in newspapers / magazines	18.6%	15.2%	17.8%	104
	An auto club such as CAA	18.5%	6.5%	15.8%	117
	Travel guide books such as Fodor's	16.8%	3.2%	13.7%	122
	Travel information received in the mail	15.1%	11.7%	14.4%	105
	Programs on television	9.1%	7.7%	8.8%	104
	Advertisements on television	5.8%	11.2%	7.0%	83
	An electronic newsletter or magazine received by e-mail	4.4%	1.4%	3.7%	118
Visits to trade, travel or sports shows	4.2%	2.2%	3.7%	112	

Use of the Internet to Plan and Arrange Trips

Quebec residents who took a trip outside of the province are much more likely to have used the Internet to plan (59.0%) and book travel (32.6%). In fact, only one-third (33.4%) of those who did not take a trip outside of the province used the Internet to plan travel and only 10.5% book travel online. 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 those who only traveled within the province to consult travel planning / booking websites (e.g., Expedia), airline websites and the websites of cruise lines. On the other hand, those who only took trips within the province are most likely to use the Internet to visit the websites of hotels or resorts and the websites of specific attractions. As with most Canadian Pleasure Travelers, Quebec residents who took trips outside of the province most often use the Internet to purchase airline tickets and accommodation. On the other, those who did not travel outside of the province most often used the Internet to arrange for accommodation or purchase tickets to a particular activity or attraction.

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

		Took a Pleasure Trip Outside of Quebec	Only Took Pleasure Trips Within Quebec	Total Pleasure Travelers in Quebec	Index
	Size of Market	3,176,237	1,022,335	4,198,572	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	41.0%	66.6%	47.3%	87
	Uses Internet to plan trips only	26.4%	22.9%	25.5%	103
	Uses Internet to book part of trip	32.6%	10.5%	27.2%	120
Types of Websites Consulted	A tourism website of a country / region / city	55.8%	37.4%	53.0%	105
	A website of a hotel or resort	53.8%	52.2%	53.6%	100
	A travel planning / booking website	38.8%	4.8%	33.5%	116
	An airline website	36.9%	4.7%	31.9%	116
	A website of an attraction	36.0%	38.8%	36.4%	99
	Some other website	28.6%	25.9%	28.2%	101
	A cruise line website	8.7%	4.3%	8.0%	108
	A motorcoach website	3.6%	1.0%	3.2%	112
Parts of Trips Booked Over The Internet	Accommodation	72.2%	61.0%	71.1%	101
	Air tickets	56.2%	7.6%	51.7%	109
	Car rental	19.8%	1.0%	18.0%	110
	Tickets or fees for specific activities or attractions	19.1%	43.0%	21.3%	89
	A package containing two or more items	16.2%	19.7%	16.5%	98
	Tickets for rail, bus or boat / ship fares	13.1%	9.7%	12.8%	103
	Other	6.5%	3.1%	6.1%	105

Media Consumption Habits

Quebec residents who took trips outside of the province are much more likely to consume travel media (e.g., travel sections of the newspapers, travel magazines). Out-of-province travelers may also be effectively reached through magazines that specialize in computer, electronic and technology and business, finance and investing. They tend to listen to jazz and big band, multicultural and classical music radio stations. Those who only travel within the province are more likely to watch soap operas, science fiction and situational comedies. They more often listen to “oldies” and country music radio stations.

Fig. 16 Media Consumption Habits

		Took a Pleasure Trip Outside of Quebec	Only Took Pleasure Trips Within Quebec	Total Pleasure Travelers in Quebec	Index
Size of Market		3,176,237	1,022,335	4,198,572	100
Newspaper Readership	Reads daily newspaper	88.7%	86.0%	88.0%	101
	Reads weekend edition of newspaper	89.3%	85.7%	88.4%	101
	Reads local neighbourhood or community newspapers	58.6%	59.3%	58.8%	100
	Reads other types of newspapers	19.9%	13.5%	18.4%	108
	Frequently or occasionally reads travel section of daily newspaper	50.4%	30.8%	45.7%	110
	Frequently or occasionally reads travel section of weekend newspaper	54.9%	31.2%	49.2%	112
Types of Magazines Read (Top 5 Indexed)	Travel (e.g., Condé Nast)	23.5%	11.7%	20.6%	114
	Computers, electronics and technology	11.7%	6.3%	10.4%	113
	Business, finance and investing	19.9%	10.9%	17.7%	112
	Outdoor activities / sports	12.0%	8.3%	11.1%	108
	Science and geography	13.6%	9.5%	12.6%	108
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	39.5%	25.7%	36.2%	109
	History	40.8%	39.8%	40.6%	101
	Science & nature shows	47.5%	47.6%	47.5%	100
	News / current affairs (e.g., 60 Minutes)	72.9%	73.1%	73.0%	100
	Cooking shows	33.4%	33.5%	33.4%	100
Type of Radio Programs Listened To (Top 5 Indexed)	Jazz / Big band	11.5%	5.3%	10.0%	115
	Multicultural	16.0%	10.7%	14.7%	109
	Classical music	22.1%	15.7%	20.6%	108
	News / Talk / Information	42.3%	36.2%	40.9%	104
	Soft music / Adult contemporary	27.5%	23.7%	26.5%	103
Types of Websites Visited (Top 5 Indexed)	Travel	56.6%	27.6%	50.2%	113
	Newspaper sites	32.0%	24.4%	30.3%	105
	Network news sites (e.g., CBC, CNN)	39.5%	30.9%	37.6%	105
	Magazine sites	21.8%	17.0%	20.7%	105
	Sports	22.1%	17.9%	21.2%	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	