

CANADIAN TRAVEL MARKET

Canadian Travelers to 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 Columbia, Parks Canada Agency, Government of Yukon, Government of Northwest Territories



Executive Summary

Over the last two years, 5.9% of adult Canadians (1,404,951) took an overnight trip to Manitoba from another province. 59.9% (842,273) of those who took a trip to Manitoba report taking a “pleasure trip” to the province. During the past two years, Manitoba was the least frequently visited Canadian destination by Canadian Pleasure Travelers who visited another province in Canada.

Those who took a pleasure trip to Manitoba are most likely to live in Saskatchewan, and to a lesser extent, Alberta and British Columbia. Those from Quebec were the least likely to have taken a pleasure trip to Manitoba during the last two years.

Canadian Pleasure Travelers who visited Manitoba are over-represented among those 55 and older who are married and do not have children 18 and younger living at home. Their level of education and household incomes are comparable to that of the average Canadian Pleasure Traveler.

Canadians who visited Manitoba from another province are somewhat more active than other Canadian Pleasure Travelers in culture and entertainment pursuits while on trips, and especially in nature-oriented outdoor activities (e.g., fishing, hunting, wildlife viewing), educational, participatory activities (e.g., participatory historical activities, aboriginal cultural experiences, agro-tourism) and educational attractions (e.g., science and technology exhibits, garden-themed attractions). They are also more likely to go camping and stay in a wilderness setting and frequently take multi-location, self-guided tours and tours using a motor-home or RV. They prefer vacations that provide intellectual stimulation, allow them to keep family ties alive and that offer an opportunity to renew connections with friends.

Canadians who took a trip to Manitoba are more likely than others to obtain travel information from automobile clubs such as CAA, maps and the official travel brochures and information centers of specific states or provinces. They are only average users of the Internet and the travel media. However, this travel segment may also be effectively reached through educational television programming (e.g., history, science and nature, biography), news media (e.g., news magazine, news / information / talk radio stations, news websites) and outdoor activity and sports magazines and crafts, antiques and collectibles magazines. They are also more likely than others to listen to country and western radio stations.

Travel Activity and Motivation Survey (TAMS)

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

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

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

TAMS was sponsored by the following organizations:

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

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

The Canadian database is used in this current report. This survey was conducted by Statistics Canada. 31,699 completed questionnaires were returned. The data have been weighted to project the results to the Canadian population.

This report profiles Canadians who live in other provinces who visited Manitoba and compares them with other Canadian Pleasure Travelers (i.e., those who took at least one pleasure trip in the last two years). This report is part of a series of eight reports reviewing the out-of-province travel activities of Canadians to specific destinations within Canada prepared using the Canadian TAMS database.

Canadian Travelers to Manitoba

Market Incidence

Over the last two years, 5.9% of adult Canadians (1,404,951) took an overnight trip to Manitoba from another province. 59.9% (842,273) of those who took a trip to Manitoba report taking a “pleasure trip” to the province. Overall, 4.7% of the Canadian Pleasure Travelers from other provinces reported taking at least one pleasure trip to Manitoba during the past two years. Among those who took a pleasure trip to Manitoba, 37.1% report taking two or more pleasure trips to the province.

During the past two years, Manitoba was the least frequently visited Canadian destination by Canadian Pleasure Travelers who visited another province in Canada.

(Note: The TAMS Canada dataset treats the Atlantic Region as a single destination).

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

	Manitoba
Number of Out-of-Province Canadians Taking a Trip to Manitoba (Any Purpose) ²	1,404,951
Percent of Out-of-Province Canadian Population	5.9%
Number of Out-of-Province Canadians Taking a Pleasure Trip to Manitoba ³	842,273
Percent of Out-of-Province Canadian Pleasure Travelers ⁴	4.7%
Percent of Canadian Pleasure Travelers Taking Two or More Pleasure Trips to Manitoba ⁵	37.1%

- 1 - “Trips” are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.
- 2 - Defined as individuals who took at least one overnight trip to Manitoba in the last two years for any purpose.
- 3 - This row reports the number of the Canadians who took a “pleasure trip” to Manitoba from another province 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 a trip to Manitoba from another province.
- 5 - This row reports the percent of Canadian Pleasure Travelers who visited Manitoba from another province who took two or more pleasure trips to Manitoba during the last two years.

Incidence by Region

Those who took a pleasure trip to Manitoba are most likely to live in Saskatchewan, and to a lesser extent, Alberta and British Columbia. Those from Quebec were the least likely to have taken a pleasure trip to Manitoba during the last two years.

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

	Population	Estimated Number Who Took a Pleasure Trip to Manitoba	Percent of Pleasure Travelers Who Took a Pleasure Trip to Manitoba	Percent of Total Population Who Took a Pleasure Trip to Manitoba
Canada	23,932,996	842,273	4.7%	4.1%
Atlantic Provinces	1,822,494	22,128	1.7%	1.6%
Quebec	5,940,869	59,842	1.4%	1.1%
Ontario	9,671,592	304,139	4.2%	3.6%
Saskatchewan	706,325	143,645	26.5%	23.6%
Alberta	2,465,540	162,387	8.1%	8.4%
British Columbia	3,326,176	150,132	5.6%	5.1%

Demographic Profile

Canadian Pleasure Travelers who visited Manitoba are over-represented among those who are 55 and older, married and do not have children 18 and younger living at home. Their gender, level of education and average household incomes are comparable to that of the average Canadian Pleasure Traveler.

Fig. 3 Demographic Profile of Visitors to Manitoba Relative to All Out-of-Province Canadian Pleasure Travelers

Attribute	Size of Market	Took a Pleasure Trip to Manitoba	Did Not Take a Pleasure Trip to Manitoba ¹	Pleasure Travelers	Index ²
		842,273	17,002,178	17,844,451	100
Gender	Male	49.0%	48.8%	48.8%	100
	Female	51.0%	51.2%	51.2%	100
Age of Respondent	18 to 24	9.3%	12.9%	12.8%	73
	25 to 34	19.4%	19.3%	19.3%	101
	35 to 44	17.3%	20.7%	20.6%	84
	45 to 54	17.4%	20.4%	20.3%	86
	55 to 64	18.5%	13.9%	14.2%	131
	65 Plus	18.0%	12.7%	12.9%	139
Average Age		47.5	44.4	44.5	N/A
Marital Status	Not married	26.8%	32.6%	32.3%	83
	Married	73.2%	67.4%	67.7%	108
Parental Status	No children under 18	74.4%	71.1%	71.3%	104
	Children under 18	25.6%	28.9%	28.7%	89
Education	High school or less	38.8%	35.8%	35.9%	108
	Some post-secondary	10.7%	11.2%	11.2%	96
	Post-secondary diploma/certificate	18.7%	22.2%	22.0%	85
	University degree	31.8%	30.8%	30.9%	103
Household Income	Under \$20,000	4.0%	5.8%	5.7%	71
	\$20,000 to \$39,999	14.1%	14.4%	14.4%	98
	\$40,000 to \$59,999	19.5%	16.4%	16.5%	118
	\$60,000 to \$79,999	14.9%	15.2%	15.2%	98
	\$80,000 to \$99,999	11.6%	12.3%	12.2%	95
	\$100,000 or more	24.8%	22.9%	23.0%	108
	Not stated	11.1%	13.1%	13.0%	86
Average Household Income		\$74,530	\$72,950	\$73,026	N/A

- 1 - "Did Not Take a Trip to Manitoba" is defined as an individual who took at least one out-of-town, overnight pleasure trip of one or more nights in the last two years but did not go to Manitoba on any trip.
- 2 - The "Index" is calculated by dividing the percent for those who visited Manitoba in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which visitors are over or under-represented relative to the average out-of-province Canadian Pleasure Traveler. An index of 100 means the percent of visitors is the same as that of the average out-of-province Canadian Pleasure Traveler. Index values over 100 indicate that visitors are over-represented relative to the average out-of-province Canadian Pleasure Traveler. Index values less than 100 indicate that visitors are under-represented relative to the average out-of-province Canadian Pleasure Traveler.

Travel Activity (During Last Two Years)

Those who visited Manitoba during the last two years are frequent travelers with 69.7% taking five or more pleasure trips in the last two years. (Note: 47.0% of Canadian Pleasure Travelers took five or more pleasure trips in the last two years). As such, they were more likely than the average Canadian Pleasure Traveler to have taken trips to other parts of Canada and especially Alberta (72.5%), Ontario (63.7%), Saskatchewan (61.6%) and British Columbia (60.4%). Relative to other Canadian Pleasure Travelers, those who visited Manitoba were also especially likely to have traveled to Saskatchewan and the Yukon and the Northwest Territories

On the other hand, they were only slightly more likely than others to have taken a trip to the United States and Mexico and less likely to have taken a trip to the Caribbean and to overseas destinations.

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

	Took a Pleasure Trip to Manitoba	Did Not Take a Pleasure Trip to Manitoba	Pleasure Travelers	Index
Size of Market	842,273	17,002,178	17,844,451	100
Canada	100.0%	94.5%	94.7%	106
Took a trip within own province / region	89.0%	86.2%	86.3%	103
Took a trip to an adjacent province / region	94.4%	43.9%	46.3%	204
Took a trip to non-adjacent province / region	82.1%	28.0%	30.5%	269
Newfoundland and Labrador	4.7%	4.4%	4.4%	108
Prince Edward Island	11.2%	7.1%	7.3%	153
New Brunswick	18.0%	11.8%	12.1%	149
Nova Scotia	16.7%	12.8%	13.0%	128
Quebec	33.4%	40.1%	39.8%	84
Ontario	63.7%	53.1%	53.6%	119
Manitoba	100.0%	2.5%	7.1%	1411
Saskatchewan	61.6%	7.8%	10.3%	597
Alberta	72.5%	22.9%	25.2%	287
British Columbia	60.4%	29.2%	30.6%	197
Yukon	5.5%	0.8%	1.0%	554
Northwest Territories	3.1%	0.5%	0.7%	469
Nunavut	0.4%	0.3%	0.3%	135
United States	58.3%	50.1%	50.5%	115
Mexico	14.3%	12.3%	12.4%	115
Caribbean	12.4%	16.0%	15.8%	78
All other destinations	17.4%	21.2%	21.0%	83

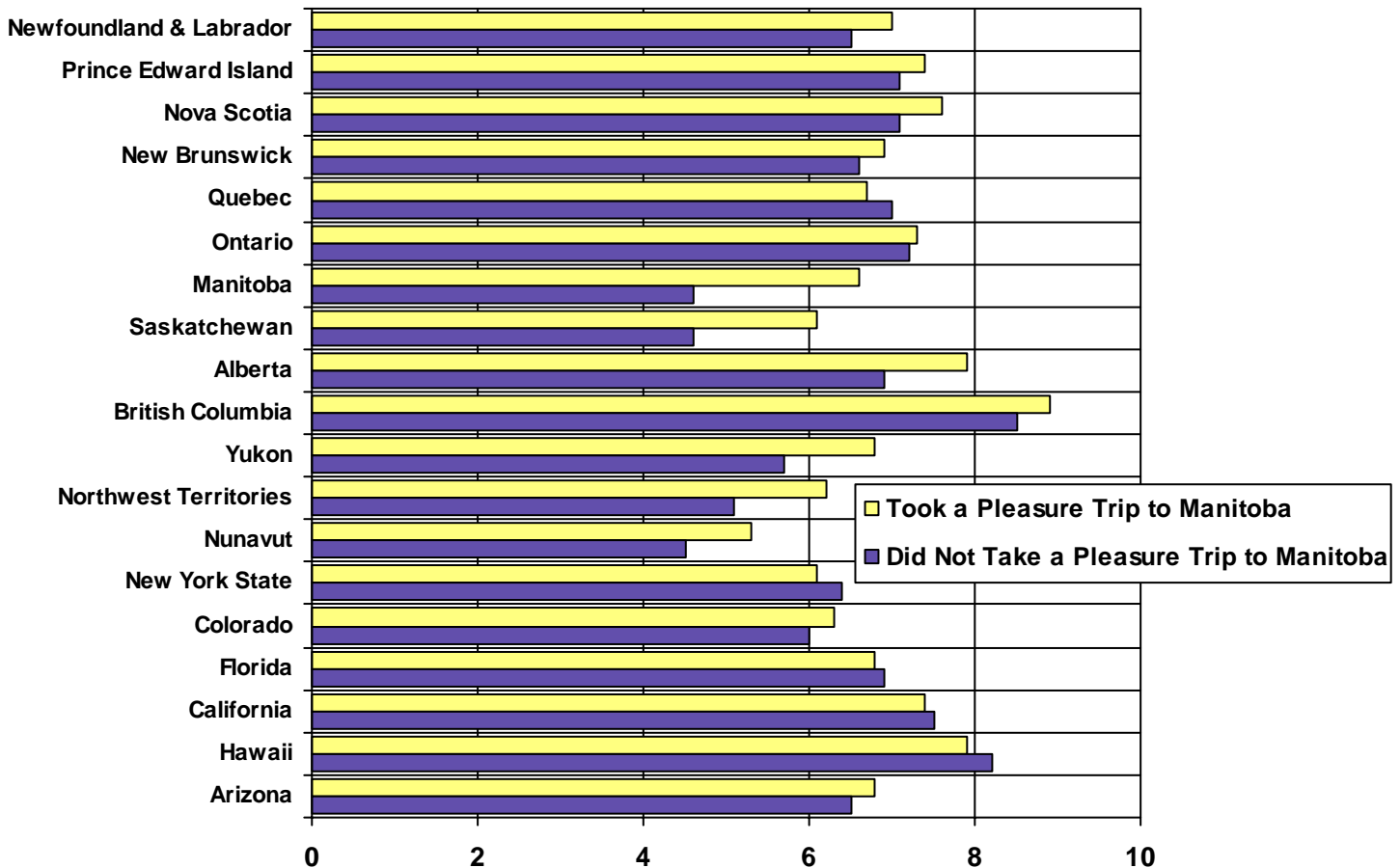
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Canadian Travelers who visited Manitoba have a more favourable impression of Manitoba, Saskatchewan and Alberta as well as the three northern territories than do other Canadian Pleasure Travelers; perhaps, in part, reflecting the fact that most of the visitors to Manitoba are from Saskatchewan. However, British Columbia (8.9) was perceived as the most appealing Canadian destination overall.

On the other hand, the appeal of the six U.S. reference states among those who visited Manitoba is comparable to that of the average Canadian Pleasure Traveler.

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 visited Manitoba from another province are somewhat more active than other Canadian Pleasure Travelers in culture and entertainment pursuits while on trips. The most frequent activities undertaken include shopping and dining and visits to historical sites, museums and art galleries. However, relative to the average Canadian Pleasure Traveler, Manitoba Visitors were much more likely to have taken part in educational, participatory activities (e.g., participatory historical activities, aboriginal cultural experiences, agro-tourism) and to have visited educational attractions (e.g., science and technology exhibits, garden attractions) suggesting that this travel segment is interested in learning experiences while on trips. They are also more likely than others to have attended equestrian or western events, sporting events, to have gambled in a casino and to have visited a health spa while on trips.

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 to Manitoba	Did Not Take a Pleasure Trip to Manitoba	Pleasure Travelers	Index
Size of Market	842,273	17,002,178	17,844,451	100
Shopping & Dining	89.2%	82.5%	82.8%	108
Historical Sites, Museums & Art Galleries	69.4%	58.0%	58.5%	119
Fairs & Festivals	48.0%	37.2%	37.7%	127
Theme Parks & Exhibits	46.3%	38.7%	39.1%	118
Musical Concerts, Festivals & Attractions	42.0%	32.4%	32.9%	128
Science & Technology Exhibits	36.2%	22.6%	23.2%	156
Casinos	33.9%	25.6%	26.0%	131
Wine, Beer & Food Tastings	29.1%	23.9%	24.2%	120
Live Theatre	25.6%	21.1%	21.4%	120
Garden Theme Attractions	25.6%	17.3%	17.7%	144
Professional Sporting Events	22.4%	15.3%	15.6%	143
Agro-Tourism	21.8%	15.5%	15.8%	138
Aboriginal Cultural Experiences	21.6%	11.2%	11.7%	185
Spas	16.6%	9.8%	10.1%	164
Amateur Tournaments	14.8%	11.7%	11.9%	125
High Art Performances	14.0%	10.9%	11.1%	127
Participatory Historical Activities	13.9%	6.4%	6.7%	207
Equestrian & Western Events	10.8%	6.4%	6.6%	162
Comedy Festivals & Clubs	9.1%	10.3%	10.2%	89
National & International Sporting Events	5.7%	3.0%	3.2%	180
Literary & Film Festivals	2.8%	2.6%	2.6%	109

Culture and Entertainment Activities Pursued While Not on Trips

Canadian Pleasure Travelers who took a pleasure trip to Manitoba from another province are quite sophisticated in their cultural pursuits while NOT traveling. Relative to other Canadian Pleasure Travelers, those who took a trip to Manitoba are especially likely to visit local historical and heritage buildings, local museums and local art galleries and art shows. They are also more likely than others to gamble in local casinos and go to local rodeos while not on trips. On the other hand, reflecting the maturity of this travel segment, they are less likely to go to local rock concerts, jazz clubs or to bars with live music. They are also less likely to have visited amusement parks and go dancing while not traveling.

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

	Took a Pleasure Trip to Manitoba	Did Not Take a Pleasure Trip to Manitoba	Pleasure Travelers	Index
Size of Market	842,273	17,002,178	17,844,451	100
Going out to eat in restaurants	94.1%	91.4%	91.5%	103
Going to festivals or fairs	65.0%	61.3%	61.5%	106
Going to historic sites or heritage buildings	52.8%	38.8%	39.4%	134
Going to amateur sporting events	51.3%	41.3%	41.8%	123
Going to pick-your-own farms or farmers' market	46.2%	40.9%	41.2%	112
Going to museums	43.5%	32.2%	32.7%	133
Going to live theatre	39.9%	34.8%	35.0%	114
Going to art galleries or art shows	38.9%	31.7%	32.1%	121
Going to professional sporting events	35.2%	31.7%	31.8%	111
Going to zoos or aquariums	31.8%	30.0%	30.1%	106
Going dancing	29.4%	30.1%	30.1%	98
Going to bars with live pop or rock bands	26.6%	27.9%	27.8%	96
Going to botanical gardens	26.2%	25.6%	25.6%	102
Going to amusement or theme parks	25.7%	29.2%	29.0%	89
Going to rock music concerts	21.2%	22.4%	22.4%	95
Going to gamble in casinos	21.0%	17.8%	18.0%	117
Going to classical music concerts	19.4%	16.5%	16.6%	117
Going to day spas	15.8%	13.8%	13.9%	114
Going to rodeos	11.6%	7.0%	7.2%	161
Staying overnight in a hotel or B&B in own city	10.9%	9.7%	9.8%	111
Going to the ballet	9.0%	7.1%	7.2%	125
Going to the opera	7.1%	6.6%	6.6%	106
Going to jazz clubs	6.5%	7.7%	7.6%	85

Outdoor Activities Pursued While on Trips

Canadians Pleasure Travelers who visited Manitoba were also quite active in outdoor activities while on trips during the past two years. Relative to the average Canadian Pleasure Traveler, they were especially likely to have taken part in nature-oriented activities (e.g., fishing, hunting, wildlife viewing, hiking, climbing and paddling, horseback riding, wilderness activities) indicating that these travelers are quite interested in wilderness experiences. Those who visited Manitoba were also more likely than other Canadian Pleasure Travelers to have gone golfing, boating and swimming and to have exercised and jogged while on trips during the past two years.

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

	Took a Pleasure Trip to Manitoba	Did Not Take a Pleasure Trip to Manitoba	Pleasure Travelers	Index
Size of Market	842,273	17,002,178	17,844,451	100
Wildlife Viewing	54.0%	40.5%	41.2%	131
Ocean Activities (e.g., swimming in ocean, sunbathing)	52.5%	48.5%	48.7%	108
Boating & Swimming (e.g., motorboating, swimming in lakes)	51.8%	40.4%	41.0%	126
Hiking, Climbing & Paddling	41.1%	33.9%	34.2%	120
Fishing	30.6%	23.0%	23.4%	131
Sports & Games (e.g., tennis, board games)	30.1%	22.2%	22.6%	133
Golfing	25.4%	17.9%	18.3%	139
Exercising & Jogging	21.2%	15.7%	15.9%	133
Downhill Skiing & Snowboarding	16.8%	14.8%	14.9%	113
Cycling	14.3%	13.5%	13.6%	105
Skating (e.g., ice skating, rollerblading)	13.7%	12.0%	12.0%	113
Team Sports (e.g., hockey, baseball)	13.2%	11.2%	11.3%	117
Snowmobiling & ATVing	13.2%	11.2%	11.3%	116
Cross-country Skiing & Snowshoeing	10.2%	9.4%	9.4%	108
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	7.6%	6.3%	6.4%	120
Hunting	6.7%	4.6%	4.7%	143
Horseback Riding	6.3%	4.8%	4.9%	129
Wilderness Activities (e.g., wilderness skills course)	5.1%	2.3%	2.4%	213
Freshwater Scuba & Snorkeling	4.6%	3.0%	3.1%	149
Motorcycling	3.6%	3.0%	3.0%	118
Extreme Air Sports (e.g., parachuting)	2.1%	1.1%	1.1%	187

Outdoor Activities Pursued While Not on Trips

When NOT traveling, Canadians who visited Manitoba continue to be very active in outdoor activities. They frequently go on day outings to local parks and picnic, exercise, swim, hike and garden while not traveling. Relative to the average Canadian Pleasure Traveler, visitors to Manitoba are especially likely to take part in nature-oriented activities (e.g., fishing, hunting, camping, canoeing and kayaking, horseback riding) while not on trips. They are also more likely than others to play golf. On the other hand, they are less likely than others to play racquet sports (e.g., tennis) or to participate in “board and blade” activities (e.g., rollerblading, skateboarding, ice-skating, snowboarding).

Fig. 9 Outdoor Activities Pursued While NOT on Trips

	Took a Pleasure Trip to Manitoba	Did Not Take a Pleasure Trip to Manitoba	Pleasure Travelers	Index
Size of Market	842,273	17,002,178	17,844,451	100
Day outing to a park	69.7%	66.7%	66.8%	104
Exercising at home or at a fitness club	69.3%	60.7%	61.1%	113
Swimming	65.3%	60.1%	60.3%	108
Gardening	63.8%	59.5%	59.7%	107
Picnicking	57.7%	53.0%	53.2%	108
Hiking	55.0%	48.9%	49.2%	112
Camping	49.5%	37.9%	38.5%	129
Cycling	44.0%	44.3%	44.3%	99
Fishing	35.9%	28.6%	28.9%	124
Golfing	35.9%	28.8%	29.1%	123
Sailing or other boating	31.0%	23.0%	23.4%	132
Ice-skating	26.7%	28.6%	28.5%	94
Jogging	26.4%	24.0%	24.1%	110
Playing team sports	22.2%	22.9%	22.9%	97
Canoeing or kayaking	22.2%	16.8%	17.0%	130
Downhill skiing	18.8%	16.4%	16.5%	114
Playing racquet sports (e.g., tennis or badminton)	16.5%	19.4%	19.3%	86
Riding an all-terrain vehicle (ATV)	15.8%	14.1%	14.2%	111
Snowmobiling	13.4%	9.4%	9.6%	140
Cross-country skiing	13.3%	12.5%	12.5%	106
Rollerblading	12.8%	14.4%	14.4%	89
Hunting	10.3%	7.5%	7.7%	135
Horseback riding	8.0%	6.7%	6.8%	117
Snowboarding	4.5%	5.1%	5.1%	89
Skateboarding	1.1%	1.6%	1.6%	73

Accommodation Stayed In While on Trips

Public and private campgrounds and resorts (e.g., lakeside / riverside resorts, seaside resorts, ski or mountain resorts) were the most popular accommodation used by Canadian Pleasure Travelers who visited Manitoba during the last two years. However, relative to the average Canadian Pleasure Traveler, visitors to Manitoba were especially likely to have stayed in a wilderness setting (e.g., wilderness lodge, remote fly-in wilderness outpost, campsite in a wilderness setting). They were also more likely than others to have toured in a motor-home or RV and to have camped in public or private campgrounds during the past two years.

Fig. 10 Accommodation Stayed In While on Trips

	Took a Pleasure Trip to Manitoba	Did Not Take a Pleasure Trip to Manitoba	Pleasure Travelers	Index
Size of Market	842,273	17,002,178	17,844,451	100
A Public Campground in a National, State, Provincial or Municipal Park	39.2%	25.6%	26.2%	149
Lakeside / Riverside Resort	27.4%	22.1%	22.4%	122
A Private Campground	26.5%	18.6%	19.0%	140
Seaside Resort	20.3%	21.0%	20.9%	97
Ski Resort or Mountain Resort	18.4%	14.0%	14.2%	130
A Camp Site in a Wilderness Setting (Not a Campground)	13.2%	8.5%	8.7%	152
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	9.3%	4.3%	4.5%	206
Wilderness Lodge You Can Drive to by Car	8.1%	5.5%	5.6%	143
Health Spa	6.9%	6.0%	6.0%	116
Country Inn or Resort with Gourmet Restaurant	5.0%	5.2%	5.2%	96
Farm or Guest Ranch	4.4%	3.0%	3.0%	144
On a Houseboat	3.7%	1.3%	1.4%	271
Remote or Fly-In Wilderness Lodge	3.3%	1.5%	1.6%	211
Remote or Fly-In Wilderness Outpost	1.0%	0.5%	0.6%	182
Cooking School	0.4%	0.4%	0.4%	103
Wine Tasting School	0.1%	0.3%	0.3%	38

Tours and Cruises Taken During Past Two Years

Those who visited Manitoba were more likely than the average Canadian Pleasure Traveler to have taken tours and cruises during the last two years. Sameday tours (both organized and self-guided), city tours, scenic country drives and multi-location, self-guided tours were the most popular tour types taken by Manitoba Visitors. However, relative to other Canadian Pleasure Travelers, Manitoba Visitors were especially likely to have taken self-guided, multi-location tours. They were also more likely than others to have taken tours of wineries and casinos and freshwater cruises (e.g., a cruise on a lake or river) during the last two years. This suggests that the marketing of Manitoba to other Canadian travelers should emphasize opportunities to experience nature.

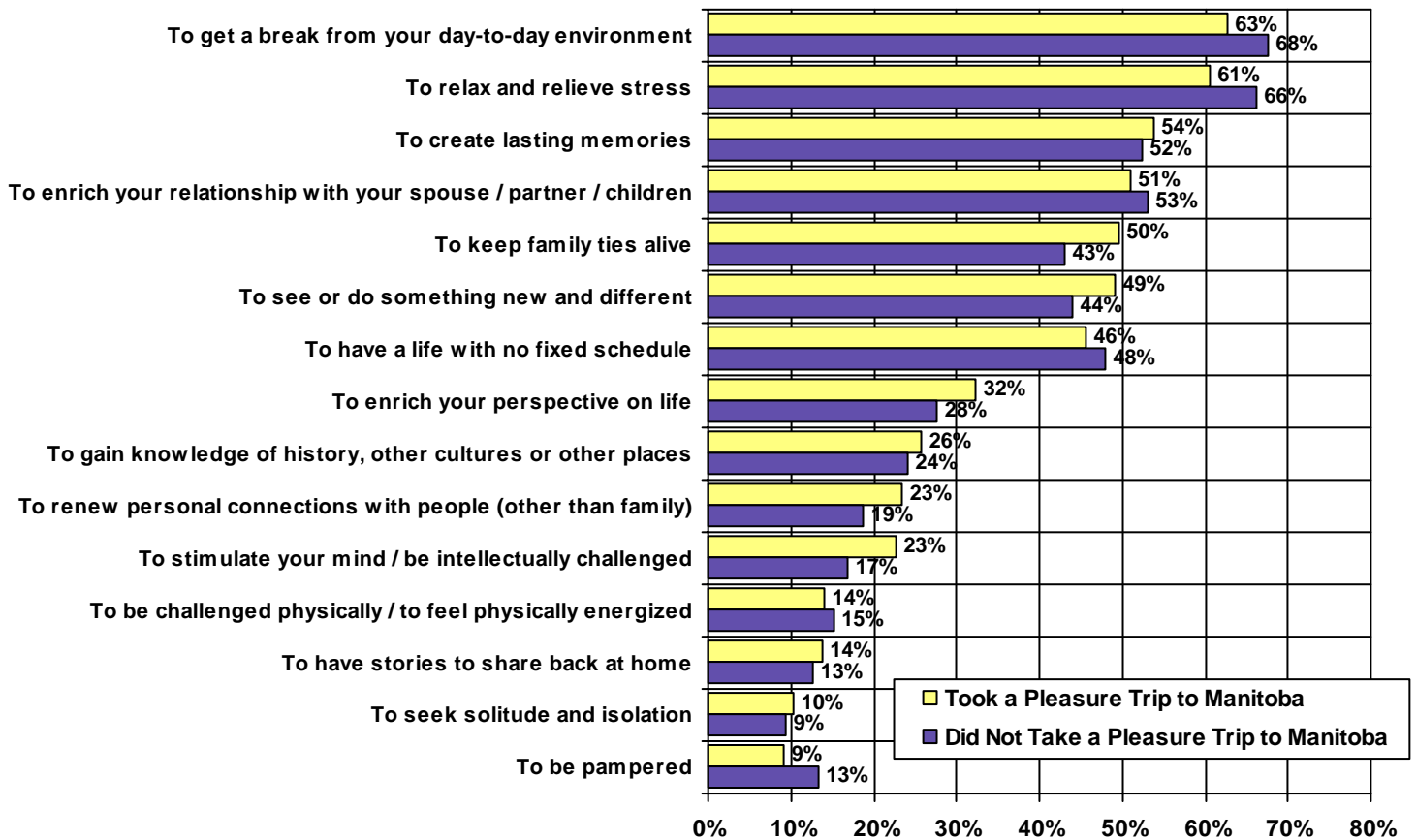
Fig. 11 Tours and Cruises Taken During Past Two Years

	Took a Pleasure Trip to Manitoba	Did Not Take a Pleasure Trip to Manitoba	Pleasure Travelers	Index
Size of Market	842,273	17,002,178	17,844,451	100
A self-guided, sameday tour while on an overnight trip	34.4%	29.2%	29.5%	117
Around the city	27.3%	23.3%	23.5%	116
Around the countryside - scenic drives	25.8%	22.4%	22.5%	114
An organized, sameday, guided tour while on an overnight trip	25.3%	22.2%	22.3%	113
A self-guided, overnight tour where you stayed in different locations	23.9%	18.1%	18.3%	130
Wilderness tour	15.8%	12.9%	13.0%	121
On the water (sightseeing cruise)	15.7%	13.1%	13.2%	119
Some other type of tour	12.0%	9.8%	9.9%	122
An organized, overnight, guided tour where you stayed in different locations	11.4%	10.1%	10.2%	112
To a casino	10.2%	6.4%	6.6%	156
An organized, overnight, guided tour where you stayed in a single location	9.3%	7.8%	7.9%	118
To a winery	8.0%	5.6%	5.8%	138
Caribbean ocean cruise	6.5%	5.4%	5.5%	118
Ocean cruise - Other	5.0%	3.3%	3.4%	148
Cruise on another lake or river	3.9%	2.4%	2.4%	160
Some other type of cruise	3.5%	1.5%	1.6%	215
To a factory	2.8%	2.6%	2.6%	107
In the air as a pilot or passenger of an airplane or helicopter	2.1%	1.9%	1.9%	108
Alaskan ocean cruise	1.8%	1.6%	1.6%	109
Cruise on the St. Lawrence River	1.4%	2.0%	2.0%	69
Great Lakes cruise	0.7%	0.8%	0.8%	86
Submarine cruise	0.5%	0.1%	0.1%	377

Benefits Sought While on Vacation

As with most Canadian Pleasure Travelers, Manitoba Visitors take vacations to get a break from their day-to-day environment, relax and relieve stress, to create lasting memories and to enrich their relationships with family members. However, relative to other Canadian Pleasure Travelers, Canadians who visited Manitoba are likely to prefer vacations that provide intellectual stimulation (e.g., to enrich one’s perspective on life), allow them to keep family ties alive and that offer an opportunity to renew connections with friends. This suggests that many of the individuals who visit Manitoba may be visiting family and friends in the province. On the other hand, Manitoba visitors are less likely to pursue vacations that allow them to be pampered.

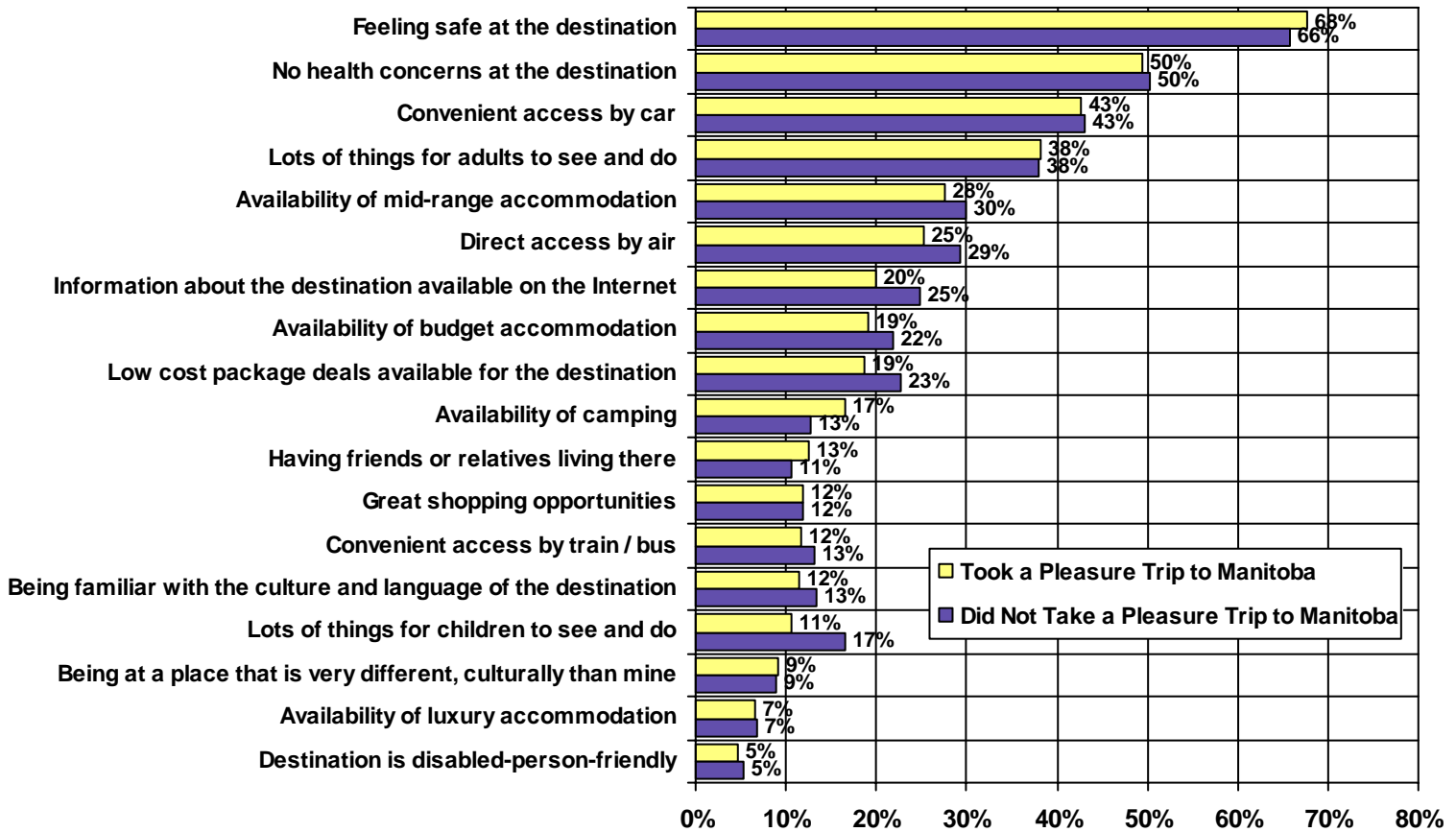
Fig.12 Benefits Sought While on Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, those who visited Manitoba consider it important that they feel safe at a destination. However, relative to other Canadian Pleasure Travelers, visitors to Manitoba consider it more important that a destination has camping available and family and friends living near-by. On the other hand, they are less concerned whether the destination has lots of activities for children to see and do, low-cost, vacation packages, information on the Internet and direct access by air.

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



How Destinations Are Selected

Manitoba Visitors are more likely than the average Canadian Pleasure Traveler to start planning vacations with a particular destination in mind. They are less likely than others to look for discount vacation packages.

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

	Took a Pleasure Trip to Manitoba	Did Not Take a Pleasure Trip to Manitoba	Pleasure Travelers	Index
Size of Market	842,273	17,002,178	17,844,451	100
Summer				
Started with a desired destination in mind	59.2%	47.9%	48.5%	122
Started by considering specific activities wanted to do	10.8%	14.0%	13.9%	78
Started with a certain type of vacation experience in mind	21.8%	23.8%	23.7%	92
Looked for packaged deals - no destination in mind	0.6%	1.4%	1.3%	47
Considered something else first	4.0%	4.3%	4.3%	92
Don't know / Other	3.6%	8.5%	8.3%	44
Winter				
Started with a desired destination in mind	54.1%	48.1%	48.5%	112
Started by considering specific activities wanted to do	16.2%	15.7%	15.7%	103
Started with a certain type of vacation experience in mind	18.9%	19.3%	19.3%	98
Looked for packaged deals - no destination in mind	1.6%	3.3%	3.2%	51
Considered something else first	3.5%	4.8%	4.7%	74
Don't know / Other	5.7%	8.8%	8.7%	66

Trip Planning and Information Sources Consulted

Similar to the average Canadian Pleasure Traveler, most of those who took a trip to Manitoba were responsible for planning their trips either on their own (40.6%) or with someone else (17.3%). When making vacation plans, Manitoba Visitors tend to consult a wider variety of sources than the average Canadian Pleasure Traveler. The majority use Internet websites, past experience, word-of-mouth and maps as sources to plan travel. However, Canadians who took a trip to Manitoba are more likely than others to obtain travel information from automobile clubs such as CAA, maps, the official travel brochures and information centers of specific states or provinces and television programs.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Took a Pleasure Trip to Manitoba	Did Not Take a Pleasure Trip to Manitoba	Pleasure Travelers	Index
	Size of Market	842,273	17,002,178	17,844,451	100
Who Plans Trips?	Respondent plans trips	40.6%	42.3%	42.2%	96
	Trip planning a shared responsibility	17.3%	16.2%	16.3%	106
	Someone else plans trips	42.1%	41.5%	41.5%	101
Information Sources Consulted	An Internet website	69.5%	65.2%	65.4%	106
	Past experience / Been there before	61.4%	49.7%	50.3%	122
	Advice of others / Word-of-mouth	57.3%	50.9%	51.2%	112
	Maps	51.6%	31.4%	32.5%	159
	Official travel guides or brochures from state / province	38.2%	25.4%	26.0%	147
	Visitor information centres	35.2%	22.9%	23.5%	150
	A travel agent	32.9%	34.4%	34.3%	96
	An auto club such as CAA	29.7%	17.0%	17.6%	168
	Articles in newspapers / magazines	23.2%	20.9%	21.0%	111
	Travel guide books such as Fodor's	16.6%	13.7%	13.8%	120
	Advertisements in newspapers / magazines	15.4%	14.3%	14.3%	107
	Travel information received in the mail	12.3%	8.8%	8.9%	137
	Programs on television	11.2%	7.4%	7.6%	148
	An electronic newsletter or magazine received by e-mail	8.6%	4.0%	4.2%	205
	Advertisements on television	6.4%	5.0%	5.0%	126
Visits to trade, travel or sports shows	4.7%	3.1%	3.2%	147	

Use of the Internet to Plan and Arrange Trips

Canadians who took a trip to Manitoba are somewhat above-average users of the Internet to plan (66.6%) and book travel (42.6%). The majority use hotel or resort websites, airline websites and the tourism websites of specific countries, regions or cities to plan their travel. However, they are more likely than other Canadian Pleasure Travelers to visit the websites of specific attractions and motorcoach lines. As with most Canadian Pleasure Travelers, Manitoba Visitors most often use the Internet to purchase airline tickets and accommodation. However, relative to the average Canadian Pleasure Traveler, they are more likely than others to use the Internet to rent cars or to purchase tickets for travel by rail, bus or boat / ship.

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

		Took a Pleasure Trip to Manitoba	Did Not Take a Pleasure Trip to Manitoba	Pleasure Travelers	Index
Size of Market		842,273	17,002,178	17,844,451	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	33.4%	41.1%	40.7%	82
	Uses Internet to plan trips only	24.0%	22.0%	22.1%	109
	Uses Internet to book part of trip	42.6%	36.9%	37.2%	115
Types of Websites Consulted	A website of a hotel or resort	60.6%	56.9%	57.1%	106
	An airline website	59.5%	45.4%	46.2%	129
	A tourism website of a country / region / city	55.6%	49.6%	49.9%	111
	A website of an attraction	47.7%	33.9%	34.6%	138
	A travel planning / booking website	45.0%	45.8%	45.7%	98
	Some other website	29.1%	27.6%	27.6%	105
	A cruise line website	8.9%	8.1%	8.2%	109
	A motorcoach website	3.8%	2.4%	2.5%	153
Parts of Trips Booked Over The Internet	Air tickets	83.5%	68.4%	69.2%	121
	Accommodation	69.8%	69.2%	69.2%	101
	Car rental	39.9%	26.3%	27.1%	147
	Tickets or fees for specific activities or attractions	29.0%	23.4%	23.7%	122
	Tickets for rail, bus or boat / ship fares	20.0%	15.3%	15.5%	129
	A package containing two or more items	14.0%	15.7%	15.6%	90
	Other	1.8%	4.0%	3.9%	47

Media Consumption Habits

Canadians who traveled to Manitoba are average consumers of travel media including the travel sections of newspapers and travel websites. However, this travel segment may also be effectively reached through educational television programming (e.g., history, science and nature, biography), news media (e.g., news magazine, news / information / talk radio stations, news websites) and magazines about outdoor activities and sports and crafts, antiques and collectibles. They are also more likely than others to listen to country and western radio stations.

Fig. 17 Media Consumption Habits

		Took a Pleasure Trip to Manitoba	Did Not Take a Pleasure Trip to Manitoba	Pleasure Travelers	Index
	Size of Market	842,273	17,002,178	17,844,451	100
Newspaper Readership	Reads daily newspaper	91.0%	87.0%	87.2%	104
	Reads weekend edition of newspaper	90.9%	87.1%	87.2%	104
	Reads local neighbourhood or community newspapers	67.0%	61.2%	61.5%	109
	Reads other types of newspapers	23.3%	16.9%	17.2%	136
	Frequently or occasionally reads travel section of daily newspaper	49.9%	45.6%	45.8%	109
	Frequently or occasionally reads travel section of weekend newspaper	48.3%	47.2%	47.3%	102
Types of Magazines Read (Top 5 Indexed)	Science and geography	26.9%	15.9%	16.4%	163
	Outdoor activities / sports	17.2%	12.6%	12.8%	134
	Regional magazines	10.5%	7.9%	8.1%	130
	Crafts, antiques and collectibles	16.1%	12.4%	12.5%	129
	News magazine	29.4%	24.0%	24.3%	121
Type of Television Programs Watched (Top 5 Indexed)	History	50.9%	41.3%	41.8%	122
	Science fiction / Fantasy shows	21.2%	19.0%	19.1%	111
	Cooking shows	34.9%	31.6%	31.7%	110
	Science & nature shows	47.9%	43.7%	43.9%	109
	Biography	45.5%	42.2%	42.4%	107
Type of Radio Programs Listened To (Top 5 Indexed)	Country music	31.9%	23.1%	23.5%	136
	Oldies (50s, 60s, 70s, 80s)	38.1%	34.1%	34.3%	111
	News / Talk / Information	43.8%	39.3%	39.5%	111
	Classical music	18.1%	17.3%	17.4%	104
	Soft music / Adult contemporary	27.0%	25.9%	25.9%	104
Types of Websites Visited (Top 5 Indexed)	Sites for specific activities or interests	39.1%	35.4%	35.6%	110
	Network news sites (e.g., CBC, CNN)	39.3%	36.1%	36.2%	109
	Travel	54.7%	50.4%	50.6%	108
	Health	46.6%	43.2%	43.4%	107
	Weather	58.5%	55.9%	56.0%	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	

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
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	