

CANADIAN TRAVEL MARKET

Canadian Travelers to Quebec

A Profile Report

January 31, 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, 20.2% of adult Canadians (3,810,487) from another province took an overnight trip to the province of Quebec. 70.7% (2,692,937) of these Quebec trips were “pleasure trips”. Overall, 18.9% of Canadian Pleasure Travelers from other provinces reported taking at least one pleasure trip to Quebec during the past two years. Among those who took a pleasure trip to Quebec, 44.2% took two or more pleasure trips to Quebec in the last two years.

Those who visited Quebec are most likely to live in Ontario and the Atlantic Region. Those from Saskatchewan were the least likely to have taken a trip to Quebec.

Canadian Pleasure Travelers who visited Quebec are over-represented among 25 to 34 year olds and those who are not married. They are also more likely to have a university degree (42.3%) and household incomes above \$100,000 (34.3%) than the average Canadian Pleasure Traveler. As such, Canadians who visited Quebec are over-represented among affluent, young singles and young couples.

Canadians who visited Quebec are quite sophisticated in their cultural pursuits while both traveling and not traveling and were much more likely than other Canadian Pleasure Travelers to have attended a literary or film festival, high art performances and to have taken part in a participatory historical activity on a trip. While not traveling, they are especially likely to patronize local live art performances (e.g., the opera, ballet, classical music concerts, live theatre, jazz clubs) and to visit local museums and art galleries. This suggests that Quebec’s cultural activities may be especially appealing to out-of-province Canadians. However they are also very active in outdoor activities while traveling and in particular, skiing (downhill and cross country) and canoeing and kayaking. Relative to other Canadian Pleasure Travelers, they 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). They are also more likely to take vacations that are physically challenging and energizing. This implies that Quebec should promote both its rich and distinctive culture as well as its opportunities for outdoor activities (e.g., skiing, canoeing and kayaking) to the Canadian marketplace.

Canadians who took a trip to Quebec are above-average users of the Internet to plan (70.1%) and book travel (49.6%). However, their consumption of travel media is only slightly above-average. They may be most effectively targeted through news magazines, news / information / talk radio stations and news websites, city lifestyle magazines and business, finance and investing magazines. They may also be reached through radio stations that feature jazz / big band music and classical music.

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 out-of-province persons who visited Quebec while on a trip and compares them with other Canadian Pleasure Travelers (i.e., those who took at least one pleasure trip or vacation in the last two years). This report is part of a series of eight reports reviewing out-of-province Canadian travelers to specific destinations within Canada prepared using the Canadian TAMS database.

Canadian Travelers to Quebec

Market Incidence

Over the last two years, 20.2% of adult Canadians (3,810,487) from other provinces took an overnight trip to the province of Quebec (for any purpose). 70.7% (2,692,937) of those who took a trip to Quebec report taking a “pleasure trip” to the province. Overall, 18.9% of Canadian Pleasure Travelers from other provinces reported taking at least one pleasure trip to Quebec during the past two years. Among those who took a pleasure trip to Quebec, 44.2% took two or more pleasure trips to Quebec in the last two years.

During the last two years, Quebec was the third most frequent Canadian destination visited by Canadian Pleasure Travelers who visited another province or the Atlantic Region (behind Ontario and British Columbia).

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

	Quebec
Number of Out-of-Province Canadians Taking a Trip to Quebec (Any Purpose) ²	3,810,487
Percent of Canadian Population	20.2%
Number of Out-of-Province Canadians Taking a Pleasure Trip to Quebec ³	2,692,937
Percent of Out-of-Province Canadian Pleasure Travelers ⁴	18.9%
Percent of Canadian Pleasure Travelers Taking Two or More Pleasure Trips to Quebec ⁵	44.2%

- 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 - Defined as individuals who took at least one overnight trip to Quebec in the last two years for any purpose.
- 3 - This row reports the number of the out-of-province Canadians who took a “pleasure trip” to Quebec 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 out-of-province Canadian “Pleasure Travelers” who took a trip to Quebec.
- 5 - This row reports the percent of out-of-province Canadian Pleasure Travelers who visited Quebec who took two or more pleasure trips to Quebec during the last two years.

Incidence by Region

Those who took a pleasure trip to Quebec are most likely to live in Ontario and the Atlantic Region. Those from Saskatchewan were the least likely to have taken a pleasure trip to Quebec during the last two years.

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

	Population	Estimated Number Who Took a Pleasure Trip to Quebec	Percent of Pleasure Travelers Who Took a Pleasure Trip to Quebec	Percent of Total Population Who Took a Pleasure Trip to Quebec
Canada	24,776,103	2,692,937	18.9%	15.9%
Atlantic Provinces	1,822,494	280,514	22.1%	17.6%
Ontario	9,671,592	1,999,261	27.9%	22.9%
Manitoba	843,107	57,871	9.7%	7.9%
Saskatchewan	706,325	25,690	4.7%	4.3%
Alberta	2,465,540	125,962	6.3%	5.5%
British Columbia	3,326,176	203,641	7.6%	7.0%

Demographic Profile

Canadian Pleasure Travelers who visited Quebec are over-represented among 25 to 34 year olds and those who are not married. They are also more likely to have a university degree (42.3%) and household incomes above \$100,000 (34.3%) than the average Canadian Pleasure Traveler (where 30.9% have a university degree and 24.9% report household incomes of \$100,000 or more). As such, affluent, young singles and couples were more likely to have taken a pleasure trip to Quebec.

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

Attribute	Size of Market	Took a Pleasure Trip to Quebec	Did Not Take a Pleasure Trip to Quebec ¹	Out-of-Province Canadian Pleasure Travelers	Index ²
		2,692,937	11,547,999	14,240,936	100
Gender	Male	51.5%	48.1%	48.7%	106
	Female	48.5%	51.9%	51.3%	95
Age of Respondent	18 to 24	11.7%	13.3%	13.0%	90
	25 to 34	22.4%	18.2%	19.0%	118
	35 to 44	21.5%	20.4%	20.6%	104
	45 to 54	20.9%	20.2%	20.4%	102
	55 to 64	12.9%	14.0%	13.8%	94
	65 Plus	10.6%	13.8%	13.2%	80
Average Age		43.5	44.8	44.6	N/A
Marital Status	Not married	33.5%	30.1%	30.7%	109
	Married	66.5%	69.9%	69.3%	96
Parental Status	No children under 18	70.6%	69.9%	70.0%	101
	Children under 18	29.4%	30.1%	30.0%	98
Education	High school or less	27.0%	39.0%	36.7%	74
	Some post-secondary	10.7%	12.1%	11.9%	90
	Post-secondary diploma/certificate	19.9%	20.6%	20.5%	97
	University degree	42.3%	28.3%	30.9%	137
Household Income	Under \$20,000	4.2%	5.5%	5.3%	80
	\$20,000 to \$39,999	11.2%	13.8%	13.3%	84
	\$40,000 to \$59,999	12.2%	16.3%	15.5%	78
	\$60,000 to \$79,999	13.3%	15.4%	15.0%	88
	\$80,000 to \$99,999	12.9%	12.3%	12.4%	104
	\$100,000 or more	34.3%	22.8%	24.9%	137
	Not stated	11.9%	13.9%	13.5%	88
Average Household Income		\$83,562	\$73,355	\$75,321	N/A

1 - "Did Not Take a Trip to Quebec" 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 Quebec on any trip.

2 - The "Index" is calculated by dividing the percent for those who visited Quebec 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 Quebec during the last two years are frequent travelers, with 62.0% 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 traveled to the United States as well as the Caribbean and overseas destinations. On the other hand, their travel to Mexico is only slightly above-average.

Those who visited Quebec also frequently traveled to other parts of Canada and especially Ontario (84.2%). Relative to other Canadian Pleasure Travelers, they were also especially likely to have traveled in the Atlantic Region during the last two years.

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

	Took a Pleasure Trip to Quebec	Did Not Take a Pleasure Trip to Quebec	Pleasure Travelers	Index
Size of Market	2,692,937	11,547,999	14,240,936	100
Canada	100.0%	93.1%	94.4%	106
Took a trip within own province / region	89.3%	84.5%	85.4%	105
Took a trip to an adjacent province / region	95.9%	36.8%	48.0%	200
Took a trip to non-adjacent province / region	47.0%	30.6%	33.7%	139
Newfoundland and Labrador	7.6%	4.5%	5.1%	150
Prince Edward Island	16.4%	5.4%	7.5%	219
New Brunswick	26.0%	10.5%	13.4%	194
Nova Scotia	26.7%	8.2%	11.7%	228
Quebec	100.0%	7.0%	24.6%	406
Ontario	84.5%	50.7%	57.1%	148
Manitoba	11.9%	11.1%	11.3%	106
Saskatchewan	10.4%	15.1%	14.2%	73
Alberta	24.3%	33.5%	31.8%	76
British Columbia	27.6%	39.8%	37.5%	74
Yukon	1.3%	1.1%	1.2%	111
Northwest Territories	0.8%	0.8%	0.8%	99
Nunavut	0.4%	0.2%	0.2%	177
United States	65.0%	51.2%	53.8%	121
Mexico	14.7%	13.5%	13.8%	107
Caribbean	20.4%	13.7%	14.9%	136
All other destinations	27.5%	19.6%	21.1%	130

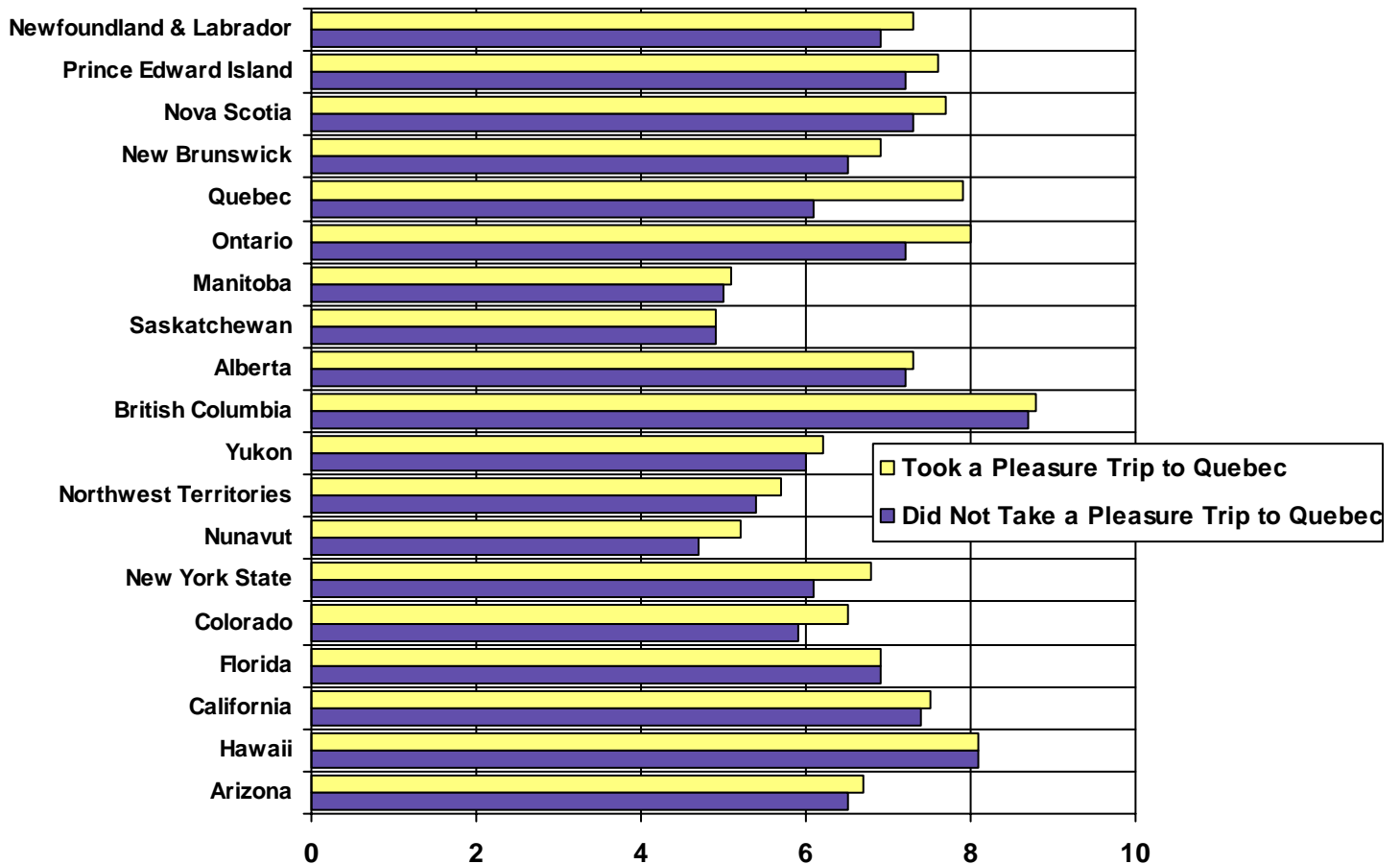
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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 Quebec have a more favourable impression of Ontario, Quebec and the Atlantic Region than do other Canadian Pleasure Travelers, perhaps, in part, reflecting the fact that most of the visitors to Quebec are from Ontario and the Atlantic Region. However, British Columbia (8.8) was perceived as the most appealing Canadian destination, followed by Ontario (8.0) and Quebec (7.9).

The perceived attractiveness of the six U.S. reference states among Quebec Visitors is similar to those of other Canadian Pleasure Travelers with the exception of New York State and Colorado. Hawaii (8.1) was considered the most appealing U.S. destination.

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 Quebec are somewhat more active than the average Canadian Pleasure Traveler 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, Quebec Visitors were much more likely to have attended a literary or film festival, taken part in a wine, beer or food tasting, visited a garden-theme attraction and to have taken part in a participatory historical activity while on a trip. They were also more likely to have attended other live art performances (e.g., high art performance, live theatre) and to have visited a science and technology exhibit while traveling during the past two years.

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

	Took a Pleasure Trip to Quebec	Did Not Take a Pleasure Trip to Quebec	Pleasure Travelers	Index
Size of Market	2,692,937	11,547,999	14,240,936	100
Shopping & Dining	87.3%	82.0%	83.0%	105
Historical Sites, Museums & Art Galleries	71.7%	56.9%	59.7%	120
Fairs & Festivals	44.9%	38.0%	39.3%	114
Theme Parks & Exhibits	43.5%	38.9%	39.8%	109
Musical Concerts, Festivals & Attractions	41.0%	31.4%	33.2%	123
Science & Technology Exhibits	33.0%	22.1%	24.2%	137
Wine, Beer & Food Tastings	31.8%	21.1%	23.1%	137
Casinos	31.5%	26.6%	27.5%	115
Live Theatre	27.2%	20.0%	21.4%	127
Garden Theme Attractions	24.4%	15.7%	17.3%	141
Professional Sporting Events	21.6%	16.5%	17.4%	124
Agro-Tourism	18.6%	14.6%	15.4%	121
High Art Performances	16.4%	9.1%	10.5%	157
Aboriginal Cultural Experiences	15.6%	12.1%	12.7%	123
Amateur Tournaments	14.9%	11.9%	12.5%	119
Spas	12.3%	8.9%	9.6%	128
Comedy Festivals & Clubs	10.6%	8.0%	8.5%	125
Participatory Historical Activities	9.5%	5.8%	6.5%	146
Equestrian & Western Events	5.3%	7.6%	7.2%	74
Literary & Film Festivals	4.0%	1.9%	2.3%	174
National & International Sporting Events	2.9%	3.7%	3.6%	80

Culture and Entertainment Activities Pursued While Not on Trips

Canadian Pleasure Travelers who took a pleasure trip to Quebec tend to be quite sophisticated in terms of their cultural pursuits while NOT traveling. They frequently dine in local restaurants and attend local festivals or fairs. Relative to other Canadian Pleasure Travelers, those who visited Quebec are especially likely to patronize local live art performances (e.g., the opera, ballet, classical music concerts, live theatre, jazz clubs, local bars with live entertainment) and to visit local museums and art galleries. On the other hand, they are less likely to gamble in local casinos or go to local rodeos.

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

	Took a Pleasure Trip to Quebec	Did Not Take a Pleasure Trip to Quebec	Pleasure Travelers	Index
Size of Market	2,692,937	11,547,999	14,240,936	100
Going out to eat in restaurants	92.2%	91.0%	91.2%	101
Going to festivals or fairs	65.4%	61.0%	61.9%	106
Going to historic sites or heritage buildings	45.5%	37.7%	39.1%	116
Going to museums	44.2%	31.0%	33.5%	132
Going to pick-your-own farms or farmers' market	43.9%	43.3%	43.4%	101
Going to live theatre	42.9%	32.5%	34.4%	125
Going to art galleries or art shows	42.8%	27.7%	30.5%	140
Going to amateur sporting events	41.9%	44.6%	44.1%	95
Going to professional sporting events	36.8%	33.5%	34.1%	108
Going to bars with live pop or rock bands	33.5%	26.8%	28.1%	119
Going dancing	32.4%	27.8%	28.7%	113
Going to zoos or aquariums	30.8%	29.4%	29.6%	104
Going to amusement or theme parks	30.4%	28.5%	28.9%	105
Going to rock music concerts	27.0%	22.3%	23.2%	116
Going to botanical gardens	26.2%	21.1%	22.0%	119
Going to classical music concerts	21.8%	14.6%	16.0%	137
Going to gamble in casinos	18.7%	20.2%	19.9%	94
Going to day spas	16.8%	12.2%	13.0%	129
Going to jazz clubs	12.4%	6.3%	7.5%	166
Going to the ballet	11.5%	6.2%	7.2%	160
Staying overnight in a hotel or B&B in own city	11.2%	9.4%	9.8%	115
Going to the opera	10.1%	5.5%	6.4%	158
Going to rodeos	3.4%	9.6%	8.4%	41

Outdoor Activities Pursued While on Trips

Canadians who visited Quebec were 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 go skiing (e.g., cross-country skiing, downhill skiing), exercising or jogging, cycling, hiking, climbing and paddling, sailing and surfing and freshwater scuba diving and snorkelling while on trips in 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 Quebec	Did Not Take a Pleasure Trip to Quebec	Pleasure Travelers	Index
Size of Market	2,692,937	11,547,999	14,240,936	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	53.0%	46.9%	48.1%	110
Wildlife Viewing	48.2%	40.5%	41.9%	115
Boating & Swimming (e.g., motorboating, swimming in lakes)	47.0%	40.8%	42.0%	112
Hiking, Climbing & Paddling	43.8%	31.3%	33.7%	130
Sports & Games (e.g., tennis, board games)	28.6%	22.5%	23.7%	121
Downhill Skiing & Snowboarding	24.4%	12.6%	14.8%	165
Exercising & Jogging	23.3%	15.8%	17.2%	135
Golfing	22.0%	19.3%	19.8%	111
Fishing	22.0%	23.8%	23.4%	94
Cycling	17.6%	11.2%	12.4%	142
Skating (e.g., ice skating, rollerblading)	14.8%	9.6%	10.6%	140
Team Sports (e.g., hockey, baseball)	14.4%	11.7%	12.2%	118
Cross-country Skiing & Snowshoeing	11.9%	6.0%	7.1%	168
Snowmobiling & ATVing	10.3%	11.1%	11.0%	94
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	9.6%	5.7%	6.4%	150
Horseback Riding	6.4%	4.9%	5.2%	123
Freshwater Scuba & Snorkeling	5.7%	2.7%	3.3%	175
Hunting	4.4%	4.1%	4.2%	104
Wilderness Activities (e.g., wilderness skills course)	2.8%	2.4%	2.4%	115
Motorcycling	2.5%	2.9%	2.8%	90
Extreme Air Sports (e.g., parachuting)	1.6%	0.9%	1.1%	148

Outdoor Activities Pursued While Not on Trips

When NOT traveling, Canadians who visited Quebec remain highly active in outdoor activities. They frequently go on day outings to local parks and picnic, exercise, swim and garden while not traveling. Relative to the average Canadian Pleasure Traveler, visitors to Quebec are especially likely to go skiing (e.g., downhill skiing, cross-country skiing, snowboarding), canoeing and kayaking and to have played racquet sports (e.g., tennis) while not on trips. On the other hand, they are less likely than others to ride ATV's or snowmobiles or to go hunting and fishing.

Fig. 9 Outdoor Activities Pursued While NOT on Trips

	Took a Pleasure Trip to Quebec	Did Not Take a Pleasure Trip to Quebec	Pleasure Travelers	Index
Size of Market	2,692,937	11,547,999	14,240,936	100
Day outing to a park	71.4%	67.7%	68.4%	104
Exercising at home or at a fitness club	64.2%	63.0%	63.2%	102
Swimming	63.8%	61.1%	61.6%	104
Gardening	59.6%	61.7%	61.3%	97
Picnicking	52.8%	51.9%	52.1%	101
Hiking	49.6%	44.3%	45.3%	109
Cycling	48.9%	38.9%	40.8%	120
Camping	38.0%	39.6%	39.3%	97
Golfing	30.2%	31.8%	31.5%	96
Jogging	29.8%	24.4%	25.4%	117
Ice-skating	29.4%	25.9%	26.6%	110
Canoeing or kayaking	26.1%	14.8%	16.9%	154
Playing team sports	24.9%	22.6%	23.0%	108
Fishing	24.6%	30.2%	29.1%	85
Sailing or other boating	23.5%	25.9%	25.4%	92
Playing racquet sports (e.g., tennis or badminton)	22.9%	16.4%	17.7%	129
Downhill skiing	20.9%	13.6%	15.0%	139
Rollerblading	16.0%	12.1%	12.8%	125
Cross-country skiing	13.5%	8.6%	9.5%	142
Riding an all-terrain vehicle (ATV)	9.5%	14.8%	13.8%	69
Snowmobiling	6.6%	10.1%	9.5%	69
Horseback riding	6.4%	6.8%	6.7%	96
Snowboarding	6.4%	4.5%	4.8%	132
Hunting	6.2%	7.5%	7.3%	86
Skateboarding	2.2%	1.7%	1.8%	124

Accommodation Stayed In While on Trips

Public and private campgrounds and resorts (e.g., seaside resorts, lakeside / riverside resorts, ski or mountain resorts) were the most popular accommodation used by Canadians who visited Quebec during the last two years. However, relative to the average Canadian Pleasure Traveler, Quebec Visitors were especially likely to have stayed at ski or mountain resorts, lakeside or riverside resorts and accommodation that specializes in fine cuisine (e.g., country inn or resort with gourmet dining, cooking school). They were also more likely to have stayed at a remote wilderness lodge or outpost during the past two years.

Fig. 10 Accommodation Stayed In While on Trips

	Took a Pleasure Trip to Quebec	Did Not Take a Pleasure Trip to Quebec	Pleasure Travelers	Index
Size of Market	2,692,937	11,547,999	14,240,936	100
A Public Campground in a National, State, Provincial or Municipal Park	29.5%	26.0%	26.7%	111
Lakeside / Riverside Resort	27.4%	19.7%	21.1%	129
Seaside Resort	24.8%	18.7%	19.8%	125
Ski Resort or Mountain Resort	22.4%	13.3%	15.1%	149
A Private Campground	18.0%	18.5%	18.4%	98
A Camp Site in a Wilderness Setting (Not a Campground)	10.6%	8.4%	8.8%	120
Country Inn or Resort with Gourmet Restaurant	6.7%	3.1%	3.7%	178
Wilderness Lodge You Can Drive to by Car	6.6%	4.2%	4.6%	141
Health Spa	5.9%	4.0%	4.4%	134
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	4.6%	4.6%	4.6%	99
Farm or Guest Ranch	3.8%	3.3%	3.4%	112
Remote or Fly-In Wilderness Lodge	2.2%	1.6%	1.7%	126
Remote or Fly-In Wilderness Outpost	1.1%	0.6%	0.7%	156
On a Houseboat	1.1%	1.6%	1.5%	70
Cooking School	0.5%	0.3%	0.3%	165
Wine Tasting School	0.3%	0.3%	0.3%	117

Tours and Cruises Taken During Past Two Years

Those who visited Quebec were much 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) and city tours were the most popular. However, relative to other Canadian Pleasure Travelers, Quebec visitors were especially likely to have taken multi-location, self-guided and guided tours, tours of casinos and wineries and fresh water cruises (e.g., a cruise on the St. Lawrence River or the Great Lakes). This suggests that the marketing of Quebec to out-of-province Canadian travelers should emphasize opportunities for sightseeing tours within the province.

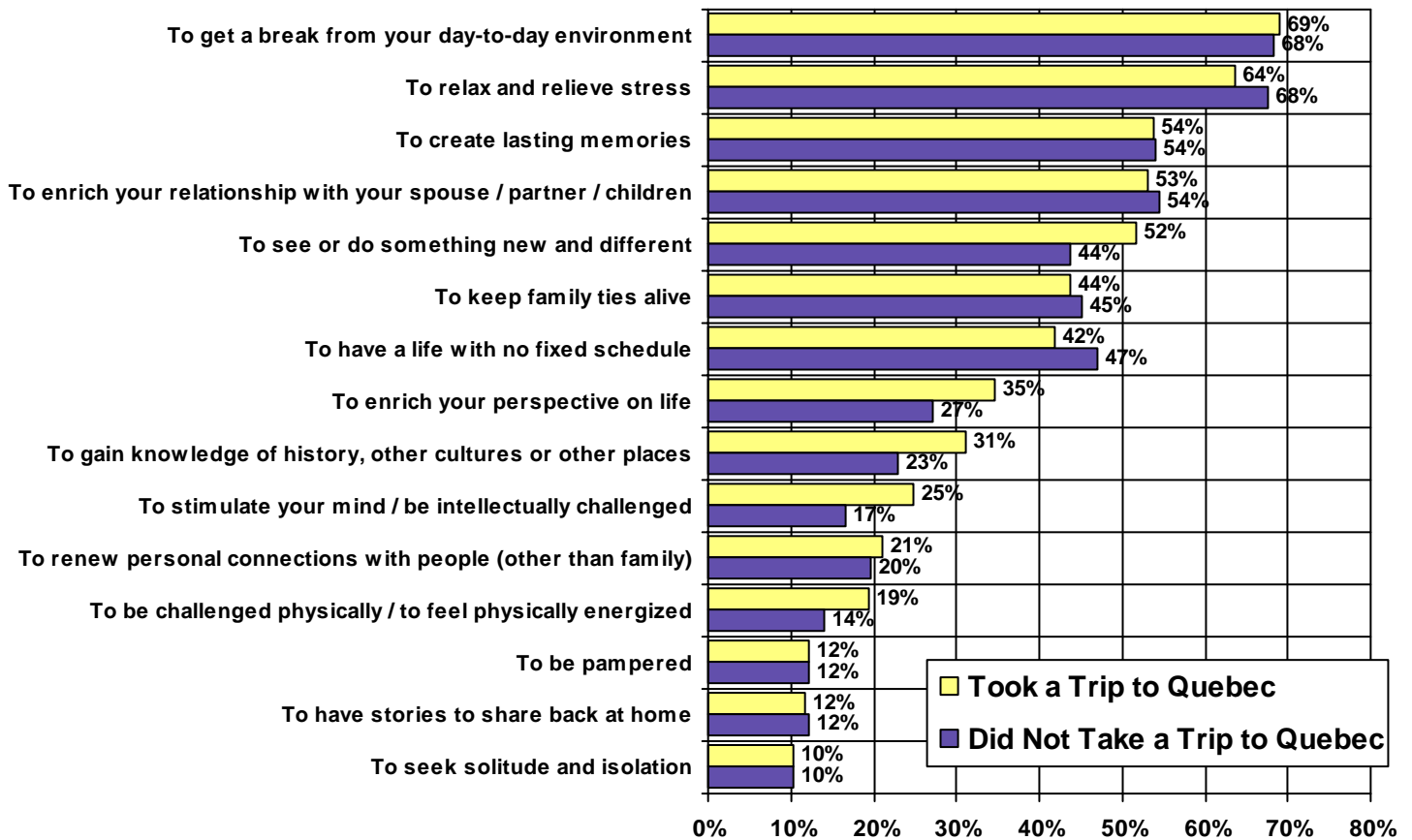
Fig. 11 Tours and Cruises Taken During Past Two Years

	Took a Pleasure Trip to Quebec	Did Not Take a Pleasure Trip to Quebec	Pleasure Travelers	Index
Size of Market	2,692,937	11,547,999	14,240,936	100
A self-guided, sameday tour while on an overnight trip	39.8%	27.8%	30.1%	132
Around the city	34.1%	22.7%	24.8%	137
An organized, sameday, guided tour while on an overnight trip	31.0%	21.9%	23.6%	131
Around the countryside - scenic drives	30.6%	21.0%	22.8%	134
A self-guided, overnight tour where you stayed in different locations	23.6%	15.0%	16.6%	142
On the water (sightseeing cruise)	18.9%	12.0%	13.3%	142
Wilderness tour	16.8%	11.4%	12.4%	135
Some other type of tour	13.9%	10.1%	10.8%	129
An organized, overnight, guided tour where you stayed in different locations	12.9%	8.6%	9.4%	137
An organized, overnight, guided tour where you stayed in a single location	11.8%	6.8%	7.7%	152
To a casino	9.5%	6.0%	6.6%	143
To a winery	8.0%	5.3%	5.8%	138
Caribbean ocean cruise	5.9%	5.3%	5.4%	110
Ocean cruise - Other	4.2%	3.3%	3.5%	122
Cruise on another lake or river	3.7%	1.9%	2.2%	167
To a factory	3.3%	2.9%	3.0%	110
In the air as a pilot or passenger of an airplane or helicopter	3.0%	1.7%	2.0%	153
Some other type of cruise	2.9%	1.4%	1.7%	173
Cruise on the St. Lawrence River	2.5%	0.5%	0.9%	292
Great Lakes cruise	1.9%	0.5%	0.8%	256
Alaskan ocean cruise	1.4%	2.0%	1.9%	75
Submarine cruise	0.2%	0.2%	0.2%	114

Benefits Sought While on Vacation

As with most Canadian Pleasure Travelers, those who visited Quebec take vacations to get a break from their day-to-day environment, relax and relieve stress and create lasting memories. However, relative to other Canadian Pleasure Travelers, Canadians who visited Quebec are 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). They are also more likely to take vacations that offer opportunities to be physically challenged and energized. This suggests that Quebec should promote both its rich and distinctive culture as well as its opportunities for outdoor activities (e.g., skiing, canoeing and kayaking) to the Canadian marketplace.

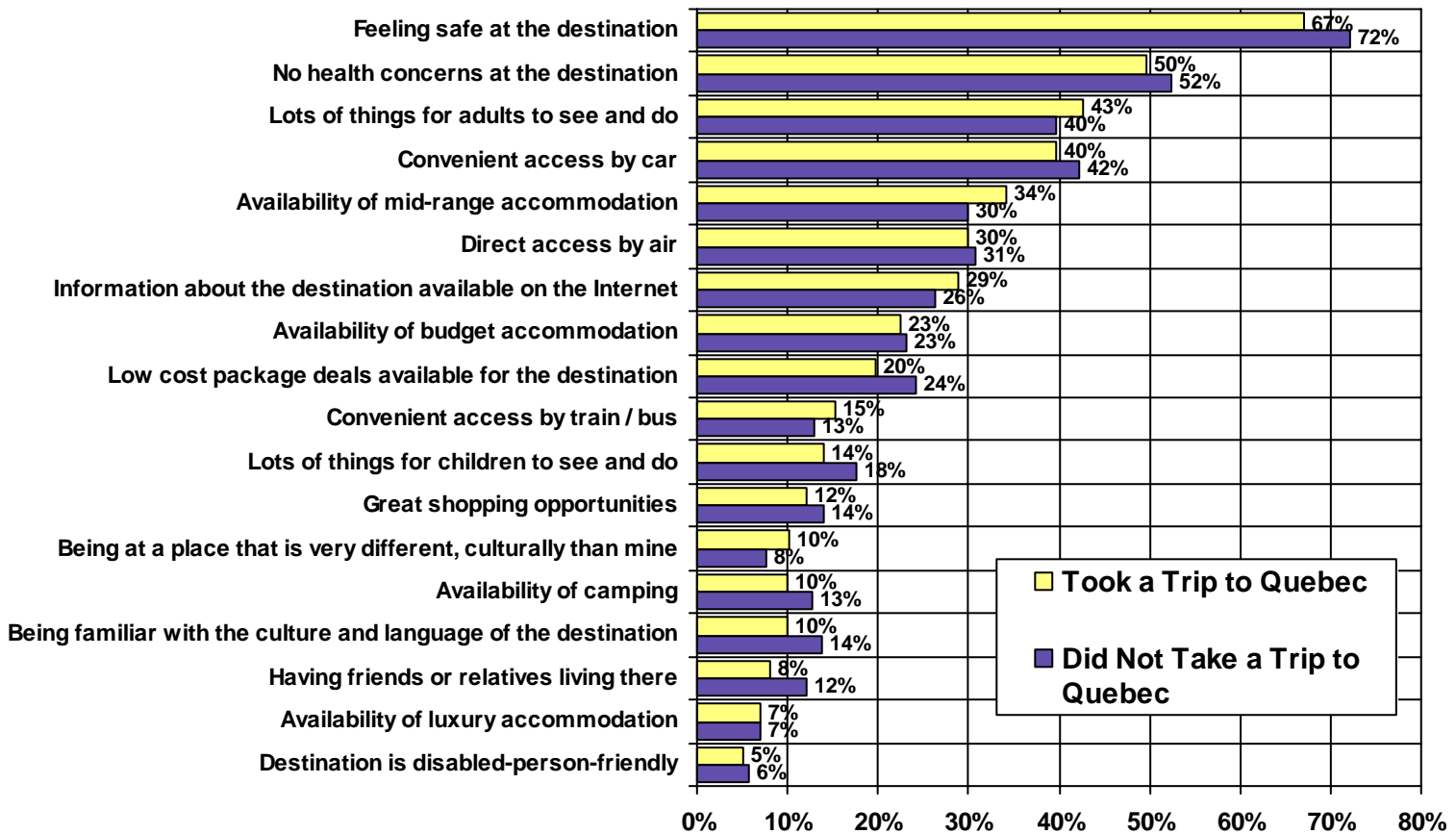
Fig.12 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

As with most Canadian Pleasure Travelers, those who visited Quebec consider it important that they feel safe at a destination. However, relative to other Canadian Pleasure Travelers, visitors to Quebec consider it more important that the destination has a distinct culture and mid-range priced accommodation. On the other hand, they are less concerned whether the destination has lots of activities for children to see and do, family or friends living nearby, a familiar culture and language and low-cost, vacation packages available.

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



How Destinations Are Selected

Similar to the average Canadian Pleasure Traveler, the majority of Quebec Visitors start planning vacations with a particular destination in mind. However, those who have visited Quebec in the last two years are more likely than the average Canadian Pleasure Traveler to begin planning their trips by first considering what types of activities they would like to do.

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

	Took a Pleasure Trip to Quebec	Did Not Take a Pleasure Trip to Quebec	Pleasure Travelers	Index
Size of Market	2,692,937	11,547,999	14,240,936	100
Summer				
Started with a desired destination in mind	51.0%	50.4%	50.5%	101
Started by considering specific activities wanted to do	15.0%	11.5%	12.2%	123
Started with a certain type of vacation experience in mind	23.6%	23.5%	23.5%	100
Looked for packaged deals - no destination in mind	1.6%	1.2%	1.3%	125
Considered something else first	3.4%	4.2%	4.1%	83
Don't know / Other	5.4%	9.2%	8.4%	65
Winter				
Started with a desired destination in mind	47.1%	51.7%	50.7%	93
Started by considering specific activities wanted to do	21.5%	12.9%	14.7%	146
Started with a certain type of vacation experience in mind	17.9%	19.7%	19.3%	93
Looked for packaged deals - no destination in mind	2.8%	2.8%	2.8%	100
Considered something else first	3.6%	4.0%	3.9%	91
Don't know / Other	7.0%	8.9%	8.5%	83

Trip Planning and Information Sources Consulted

Similar to the average Canadian Pleasure Traveler, most of those who took a trip to Quebec were responsible for planning their trips either on their own (42.4%) or with someone else (15.7%). When making vacation plans, they tended to consult a wider variety of sources than the average Canadian Pleasure Traveler. The majority use Internet websites, past experience and word-of-mouth as sources to plan travel. However, Canadians who took a trip to Quebec are more likely than others to obtain travel information from direct mail, travel guidebooks such as Fodor's, official travel brochures and information centers of specific states or provinces and newspaper and magazine articles.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Took a Pleasure Trip to Quebec	Did Not Take a Pleasure Trip to Quebec	Pleasure Travelers	Index
Size of Market		2,692,937	11,547,999	14,240,936	100
Who Plans Trips?	Respondent plans trips	42.4%	41.4%	41.6%	102
	Trip planning a shared responsibility	15.7%	18.1%	17.6%	89
	Someone else plans trips	41.9%	40.5%	40.8%	103
Information Sources Consulted	An Internet website	76.5%	64.1%	66.4%	115
	Advice of others / Word-of-mouth	58.3%	50.0%	51.6%	113
	Past experience / Been there before	58.1%	51.6%	52.8%	110
	Maps	42.4%	33.1%	34.9%	122
	A travel agent	38.5%	33.6%	34.5%	112
	Official travel guides or brochures from state / province	35.4%	21.7%	24.3%	146
	Visitor information centres	31.1%	20.5%	22.5%	138
	Articles in newspapers / magazines	28.2%	17.8%	19.8%	143
	An auto club such as CAA	23.9%	16.8%	18.2%	131
	Travel guide books such as Fodor's	20.7%	11.9%	13.6%	152
	Advertisements in newspapers / magazines	17.1%	12.4%	13.3%	129
	Travel information received in the mail	11.7%	6.3%	7.3%	160
	Programs on television	9.0%	6.7%	7.2%	125
	Advertisements on television	6.2%	4.0%	4.4%	140
	An electronic newsletter or magazine received by e-mail	5.9%	3.9%	4.3%	137
Visits to trade, travel or sports shows	3.6%	2.8%	2.9%	123	

Use of the Internet to Plan and Arrange Trips

Canadians who took a trip to Quebec are above-average users of the Internet to plan (70.1%) and book travel (49.6%). The majority use travel planning / booking websites (e.g., Expedia), hotel or resort websites and airline websites. However, they are more likely than other Canadian Pleasure Travelers to visit the website of a specific attraction. As with most Canadian Pleasure Travelers, Quebec 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, purchase travel packages and purchase fares for travel by rail, bus or boat / ship.

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

		Took a Pleasure Trip to Quebec	Did Not Take a Pleasure Trip to Quebec	Pleasure Travelers	Index
	Size of Market	2,692,937	11,547,999	14,240,936	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	29.9%	41.1%	38.9%	77
	Uses Internet to plan trips only	20.5%	21.3%	21.1%	97
	Uses Internet to book part of trip	49.6%	37.7%	39.9%	124
Types of Websites Consulted	A website of a hotel or resort	65.0%	55.8%	57.9%	112
	A tourism website of a country / region / city	58.0%	46.5%	49.0%	118
	A travel planning / booking website	55.3%	46.9%	48.8%	113
	An airline website	55.1%	48.5%	50.0%	110
	A website of an attraction	42.3%	31.6%	34.0%	125
	Some other website	31.2%	26.4%	27.4%	114
	A cruise line website	9.1%	7.8%	8.1%	113
	A motorcoach website	3.2%	2.0%	2.3%	141
Parts of Trips Booked Over The Internet	Accommodation	77.3%	66.1%	68.8%	112
	Air tickets	75.0%	72.4%	73.0%	103
	Car rental	36.5%	26.6%	29.0%	126
	Tickets or fees for specific activities or attractions	27.2%	23.1%	24.1%	113
	Tickets for rail, bus or boat / ship fares	24.3%	13.2%	15.8%	154
	A package containing two or more items	18.5%	14.1%	15.2%	122
	Other	3.4%	3.5%	3.5%	99

Media Consumption Habits

Canadians who traveled to Quebec are slightly above-average consumers of travel media including the travel sections of newspapers, travel magazines, travel programs on television and travel websites. However, this segment may also be effectively reached through news magazines, news / information / talk radio stations and news websites. They may also be targeted through city lifestyle magazines, business, finance and investing magazines and late night talk shows. They tend to listen to radio stations that feature jazz and big band music and classical music.

Fig. 17 Media Consumption Habits

		Took a Pleasure Trip to Quebec	Did Not Take a Pleasure Trip to Quebec	Pleasure Travelers	Index
	Size of Market	2,692,937	11,547,999	14,240,936	100
Newspaper Readership	Reads daily newspaper	87.2%	87.0%	87.0%	100
	Reads weekend edition of newspaper	86.9%	87.0%	87.0%	100
	Reads local neighbourhood or community newspapers	62.7%	62.3%	62.3%	101
	Reads other types of newspapers	18.4%	16.4%	16.8%	109
	Frequently or occasionally reads travel section of daily newspaper	50.0%	44.8%	45.8%	109
	Frequently or occasionally reads travel section of weekend newspaper	52.7%	45.4%	46.8%	113
Types of Magazines Read (Top 5 Indexed)	Magazines about your city	18.0%	10.2%	11.7%	154
	News magazine	32.6%	21.0%	23.2%	141
	Business, finance and investing	22.3%	14.4%	15.9%	141
	Travel (e.g., Condé Nast)	11.5%	8.6%	9.1%	126
	Photography and video	4.4%	3.7%	3.8%	116
Type of Television Programs Watched (Top 5 Indexed)	Late night talk shows	20.5%	17.7%	18.3%	112
	Shopping channels	5.2%	4.8%	4.8%	108
	Travel shows	30.1%	28.2%	28.6%	105
	Science & nature shows	44.4%	42.4%	42.8%	104
	Biography	44.5%	42.6%	43.0%	103
Type of Radio Programs Listened To (Top 5 Indexed)	Jazz / Big band	12.0%	7.5%	8.4%	143
	Classical music	20.8%	15.2%	16.3%	128
	News / Talk / Information	46.7%	37.2%	39.0%	120
	Multicultural	7.8%	6.2%	6.5%	120
	All sports	11.3%	10.2%	10.4%	109
Types of Websites Visited (Top 5 Indexed)	Magazine sites	19.7%	14.4%	15.5%	128
	Newspaper sites	40.7%	30.1%	32.2%	126
	Network news sites (e.g., CBC, CNN)	44.0%	33.7%	35.7%	123
	Travel	55.6%	49.4%	50.7%	110
	Shopping (all types)	37.6%	34.1%	34.8%	108

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	