

## CANADIAN TRAVEL MARKET

# Visiting Casinos While on Trips Of One or More Nights

### *A Profile Report*

**November 24, 2007**

**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



## Visiting Casinos While on Trips

### Executive Summary

Over the last two years, 19.3% (4,777,777) of adult Canadians visited a casino while on an out-of-town, overnight trip of one or more nights. Visiting a casino while on trips was the 6<sup>th</sup> most frequent culture and entertainment activity type undertaken by Canadian Pleasure Travelers in the past two years. Of those who visited casinos, 23.3% (1,114,500) reported that this activity was the main reason for taking at least one trip.

Relative to the average Canadian Pleasure Traveler, Casino Visitors are more likely to be 45 years of age or older, married and without dependent children (less than 18 years of age) living at home. They are the second least likely of the 21 culture and entertainment activity types to have a university education (26.8%) and their household incomes are slightly above-average (\$76,328). They are over-represented in Ontario and Saskatchewan.

Casino Visitors are more frequent out-of-country travelers than the majority of the other culture and entertainment activity types. They were the 6<sup>th</sup> most likely of the 21 culture and entertainment activity types to have visited the United States (64.1%), the 7<sup>th</sup> most likely to have visited Mexico (16.8%) and the 5<sup>th</sup> most likely to have taken a trip to the Caribbean (22.1%) in the past two years. However, their domestic travel is below-average. They were only the 19<sup>th</sup> most likely to have taken a trip within their own province or region (87.3%), the 18<sup>th</sup> most likely to have traveled to an adjacent province or region (52.2%) and the second least likely of the 21 culture and entertainment activity types to have visited a non-adjacent province or region (34.3%) in the past two years.

Casino Visitors were more likely than other Canadian Pleasure Travelers to attend sporting events (e.g., professional sports events, equestrian & western events, national & international sports events) and to take in live entertainment (comedy clubs, live theatre, musical concerts) while on trips. They also enjoy playing competitive sports (e.g., golfing, sports and games) and are more likely than others to visit spas. They were also more likely to have taken ocean or freshwater cruises during the past two years. They prefer vacations that are relaxing, relieve stress, entertain them and allow them to be pampered.

Relative to the other culture and entertainment activity types, Casino Visitors are less likely to use the Internet to plan (64.8%) and book (42.0%) travel. However, they are above-average users of travel-related media (including newspaper sections, magazines, television, websites) and travel agents and responsive to vacation packages. They may be targeted most effectively through sports-related media (e.g., pro-sports magazines, sports on television, all-sports radio, sports websites) and through games websites.

### 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 persons who visited a casino 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 44 Activity Reports prepared using the Canadian TAMS database.

## Visiting Casinos While on Trips

### Market Incidence

Over the last two years, 19.3% of adult Canadians (4,777,777) visited a casino while on an out-of-town, overnight trip of one or more nights. Visiting a casino while on trips was the 6<sup>th</sup> most frequent culture and entertainment activity type undertaken by Canadian Pleasure Travelers in the past two years. However, visiting a casino is generally not the main reason for travel. Only 23.3% (1,114,500) of those who visited a casino reported that this activity was the main reason for taking at least one trip in the past two years.

Fig. 1 Incidence of Visiting Casinos While on Trips<sup>1</sup>

	Number of Casino Visitors <sup>2</sup>	Percent Main Reason for Trip <sup>3</sup>	Percent of Pleasure Travelers <sup>4</sup>	Percent of Total Canadian Population <sup>5</sup>
Size of Market	4,777,777	1,114,500	18,439,508	24,776,103
Visit to a Casino	4,777,777	23.3%	25.9%	19.3%

- 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 - "Casino Visitors" are defined as individuals who visited a casino while on an out-of-town, overnight trip of one or more nights during the past two years and who took at least one out-of-town pleasure trip of one or more nights during the past two years. This column reports the number of individuals who participated in the activity on at least one trip during the last two years.
- 3 - This column reports the percent who participated in each activity who stated that the activity was the main reason for taking at least one trip during the past two years.
- 4 - "Pleasure Travelers" are defined as individuals who have taken at least one out-of-town pleasure trip of one or more nights in the last two years. This column reports the percent of Pleasure Travelers who participated in each activity on at least one trip during the last two years.
- 5 - This column reports the percent of the Total Canadian Adult Market who participated in each activity on a trip during the past two years.

### Incidence by Region

Casino Visitors are over-represented among Canadian Pleasure Travelers living in Ontario and Saskatchewan. They are least likely to live in the Atlantic Provinces and Quebec.

Fig. 2 Geographic Distribution of Those Who Visited Casinos While on Trips

	Total Population	Estimated Number Who Visited a Casino on a Trip	Percent of Pleasure Travelers in Region Who Visited a Casino on a Trip	Percent of Total Regional Population Who Visited a Casino on a Trip
Canada	24,776,103	4,777,777	25.9%	19.3%
Atlantic Provinces	1,822,494	236,910	18.7%	13.0%
Quebec	5,940,869	855,701	20.4%	14.4%
Ontario	9,671,592	2,211,299	30.8%	22.9%
Manitoba	843,107	146,923	24.7%	17.4%
Saskatchewan	706,325	159,501	29.4%	22.6%
Alberta	2,465,540	484,151	24.1%	19.6%
British Columbia	3,326,176	683,294	25.7%	20.5%

## Demographic Profile

Casino Visitors are equally well-represented among males and females. Relative to the average Canadian Pleasure Traveler, they are more likely to be 45 years of age and older, married and without dependent children (less than 18 years of age) living at home. They were the second least likely of the 21 culture and entertainment activity types to have a university education (26.8%). Their household income (\$76,328) is slightly above-average (ranked 13<sup>th</sup> overall of the 21 culture and entertainment activity types).

Fig. 3 Demographic Profile of Casino Visitors Relative to All Canadian Pleasure Travelers

		Visited a Casino	Did Not Visit a Casino <sup>1</sup>	Pleasure Travelers	Index <sup>2</sup>
Attribute	Size of Market	4,777,777	13,661,731	18,439,508	100
Gender	Male	49.5%	48.6%	48.8%	101
	Female	50.5%	51.4%	51.2%	99
Age of Respondent	18 to 24	12.3%	13.0%	12.8%	96
	25 to 34	19.6%	19.2%	19.3%	101
	35 to 44	17.9%	21.5%	20.5%	87
	45 to 54	21.1%	20.0%	20.3%	104
	55 to 64	14.8%	13.9%	14.1%	105
	65 Plus	14.3%	12.4%	12.9%	111
Average Age		45.3	44.3	44.5	N/A
Marital Status	Not married	31.6%	32.4%	32.2%	98
	Married	68.4%	67.6%	67.8%	101
Parental Status	No children under 18	75.7%	69.5%	71.1%	106
	Children under 18	24.3%	30.5%	28.9%	84
Education	High school or less	40.1%	34.9%	36.2%	111
	Some post-secondary	12.0%	10.9%	11.2%	108
	Post-secondary diploma/certificate	21.0%	22.2%	21.9%	96
	University degree	26.8%	32.1%	30.7%	87
Household Income	Under \$20,000	4.8%	6.0%	5.7%	85
	\$20,000 to \$39,999	12.7%	15.1%	14.5%	88
	\$40,000 to \$59,999	16.1%	16.7%	16.5%	97
	\$60,000 to \$79,999	16.1%	14.9%	15.2%	106
	\$80,000 to \$99,999	12.8%	12.0%	12.2%	105
	\$100,000 or more	25.9%	21.7%	22.8%	114
	Not stated	11.5%	13.5%	13.0%	89
Average Household Income		\$76,328	\$71,578	\$72,829	N/A

1 - "Did Not Visit a Casino" is defined as individuals who took at least one out-of-town, overnight pleasure trip of one or more nights in the last two years but did not visit a casino on any trip. The numbers of Casino Visitors and Non-Casino Visitors equal the number of Pleasure Travelers.

2 - The "Index" is calculated by dividing the percent for Casino Visitors in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Casino Visitors are over or under-represented relative to the average Pleasure Traveler. An index of 100 means the percent participating in the activity is the same as that of the average Canadian Pleasure Traveler. Index values over 100 indicate that those participating in the activity are over-represented relative to the average Canadian Pleasure Traveler. Index values less than 100 indicate that those participating in the activity are under-represented relative to the average Canadian Pleasure Traveler.

### Travel Activity (During Last Two Years)

Casino Visitors are more frequent out-of-country travelers than the majority of the other culture and entertainment activity types. They were the 6<sup>th</sup> most likely of the 21 culture and entertainment activity types to have visited the United States (64.1%), the 7<sup>th</sup> most likely to have visited Mexico (16.8%) and the 5<sup>th</sup> most likely to have taken a trip to the Caribbean (22.1%) in the past two years.

However, the domestic travel of Casino Visitors is below-average relative to the other culture and entertainment activity types. They were only the 19<sup>th</sup> most likely to have taken a trip within their own province or region (87.3%), the 18<sup>th</sup> most likely to have traveled to an adjacent province or region (52.2%) and the second least likely of the 21 culture and entertainment activity types to have visited a non-adjacent province or region (34.3%) in the past two years.

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

	Visited a Casino	Did Not Visit a Casino	Pleasure Travelers	Index
<b>Size of Market</b>	<b>4,777,777</b>	<b>13,661,731</b>	<b>18,439,508</b>	<b>100</b>
Canada	95.6%	94.5%	94.8%	101
Took a trip within own province / region	87.3%	85.3%	85.9%	102
Took a trip to an adjacent province / region	52.2%	47.3%	48.6%	108
Took a trip to non-adjacent province / region	34.3%	30.4%	31.4%	109
Newfoundland and Labrador	4.3%	4.3%	4.3%	100
Prince Edward Island	8.0%	6.9%	7.2%	111
New Brunswick	12.9%	11.4%	11.8%	109
Nova Scotia	12.8%	12.7%	12.7%	101
Quebec	38.3%	39.1%	38.9%	98
Ontario	62.8%	50.3%	53.5%	117
Manitoba	10.8%	8.6%	9.2%	118
Saskatchewan	12.6%	11.0%	11.4%	111
Alberta	26.7%	25.5%	25.8%	103
British Columbia	32.5%	30.0%	30.6%	106
Yukon	1.4%	0.9%	1.0%	136
Northwest Territories	0.7%	0.6%	0.7%	109
Nunavut	0.2%	0.3%	0.3%	71
United States	64.1%	46.0%	50.7%	127
Mexico	16.8%	10.8%	12.4%	136
Caribbean	22.1%	13.3%	15.6%	142
All other destinations	25.4%	23.0%	23.6%	107

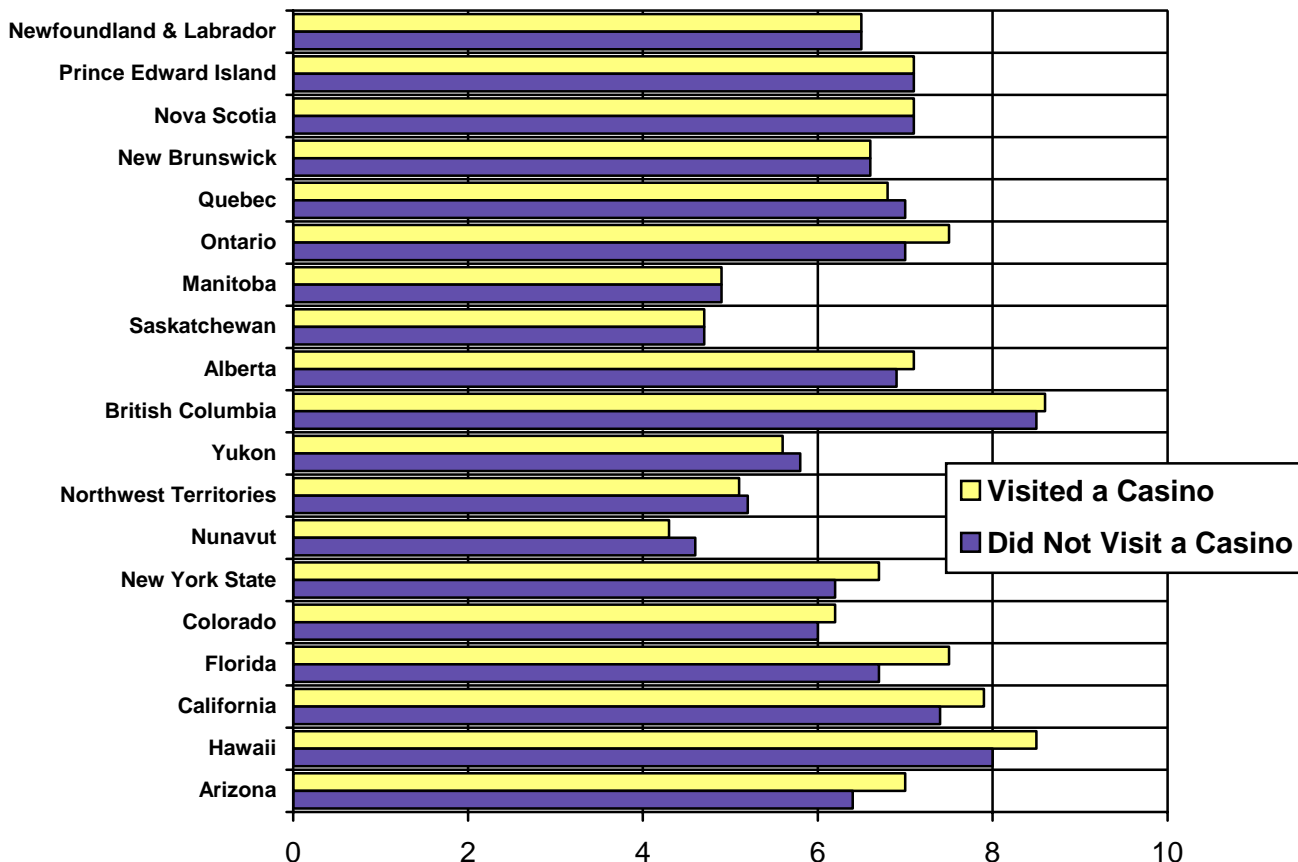
**Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories**

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.

Casino Visitors perceive most Canadian destinations to be as appealing as the average Canadian Pleasure Traveler. Only Ontario (where this segment is over-represented), was perceived to be more appealing to Casino Visitors than to others. As with most Canadian Pleasure Travelers, Casino Visitors rated British Columbia (8.6) as the most appealing destination with Ontario (7.5) considered the second most appealing.

By contrast, Casino Visitors have a more positive impression of most of the U.S. reference states than do other Canadian Pleasure Travelers and especially warm weather destinations such as California (7.9), Florida (7.5) and Hawaii (8.5).

Fig. 5 Overall Appeal Ratings of Provinces, Territories and Selected U.S. States on a 10-Point Appeal Rating Scale (Higher Scores=More Appealing)



### Other Culture and Entertainment Activities Pursued While on Trips

Casino Visitors were more active than the average Canadian Pleasure Traveler in culture and entertainment pursuits while on a trip. The majority went shopping and dining and visited historical sites, museums and art galleries while on trips. Relative to the average Canadian Pleasure Traveler, Casino Visitors were especially likely to attend sporting events (e.g., professional sports events, equestrian & western events, national & international sports events) and live entertainment (e.g., comedy festivals & clubs, musical concerts, live theatre) while on trips. They were also more likely than others to participate in wine, beer and food tastings and to visit spas while traveling.

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

	Visited a Casino	Did Not Visit a Casino	Pleasure Travelers	Index
Size of Market	4,777,777	13,661,731	18,439,508	100
Shopping & Dining	91.9%	79.7%	82.9%	111
Historical Sites, Museum & Art Galleries	67.4%	55.1%	58.3%	116
Fairs & Festivals	49.6%	33.5%	37.7%	132
Theme Parks & Exhibits	48.5%	35.9%	39.2%	124
Musical Concerts, Festivals & Attractions	44.0%	28.8%	32.7%	134
Wine, Beer & Food Tastings	34.2%	20.2%	23.8%	144
Science & Technology Exhibits	31.5%	20.2%	23.1%	136
Live Theatre	30.8%	17.7%	21.1%	146
Professional Sporting Events	24.5%	12.6%	15.7%	156
Garden Theme Attractions	23.2%	15.7%	17.6%	132
Agro-Tourism	20.7%	13.9%	15.7%	132
Comedy Festivals & Clubs	17.8%	7.5%	10.1%	176
Aboriginal Cultural Experiences	16.2%	10.0%	11.6%	140
Amateur Tournaments	16.2%	10.3%	11.8%	137
Spas	15.4%	8.2%	10.0%	153
High Art Performances	14.1%	9.9%	11.0%	128
Equestrian & Western Events	12.4%	4.7%	6.7%	186
Participatory Historical Activities	8.1%	6.2%	6.7%	120
National & International Sporting Events	5.4%	2.4%	3.2%	168
Literary & Film Festivals	3.8%	2.1%	2.6%	148

### Culture and Entertainment Activities Pursued in a Typical Year

While not traveling, Casino Visitors frequently dine in restaurants and visit festivals and fairs. They are much more likely than the average Canadian Pleasure Traveler to gamble in local casinos. They are also somewhat more likely to attend local professional sporting events, to visit day spas and to go dancing or to bars with live music. On the other hand, they are less likely to patronize local live arts performances (e.g., classical music concerts, ballet, opera) or to visit local art galleries, art shows and museums.

Fig. 7 Culture and Entertainment Activities Pursued in a Typical Year

	Visited a Casino	Did Not Visit a Casino	Pleasure Travelers	Index
Size of Market	4,777,777	13,661,731	18,439,508	100
Going out to eat in restaurants	95.4%	90.2%	91.5%	104
Going to festivals or fairs	66.8%	59.6%	61.4%	109
Going to amateur sporting events	47.4%	40.1%	42.0%	113
Going to gamble in casinos	44.4%	8.9%	18.1%	245
Going to pick-your-own farms or farmers' market	41.2%	40.9%	41.0%	100
Going to historic sites or heritage buildings	40.1%	39.0%	39.3%	102
Going to professional sporting events	39.1%	29.6%	32.1%	122
Going dancing	38.3%	26.9%	29.9%	128
Going to live theatre	37.7%	33.8%	34.8%	108
Going to amusement or theme parks	34.0%	27.1%	28.9%	118
Going to bars with live pop or rock bands	33.7%	25.6%	27.7%	122
Going to zoos or aquariums	31.9%	29.9%	30.4%	105
Going to art galleries or art shows	31.1%	32.0%	31.8%	98
Going to museums	31.1%	33.3%	32.7%	95
Going to rock music concerts	26.5%	21.0%	22.4%	118
Going to botanical gardens	26.5%	25.0%	25.4%	104
Going to day spas	18.4%	12.1%	13.8%	134
Going to classical music concerts	15.4%	16.9%	16.5%	94
Staying overnight in a hotel or B&B in own city	12.6%	8.9%	9.9%	127
Going to rodeos	8.8%	6.8%	7.3%	120
Going to jazz clubs	8.6%	7.2%	7.5%	114
Going to the ballet	6.9%	7.4%	7.3%	95
Going to the opera	6.0%	6.8%	6.6%	91

### Outdoor Activities Pursued While on Trips

Casino Visitors are moderately active in outdoor activities while on trips. Relative to the average Canadian Pleasure Traveler, they were especially likely to play golf and to take part in other competitive sports (e.g., sports & games, team sports). They were also more likely than average to exercise and jog and to participate in water-related, resort activities (e.g., freshwater scuba diving and snorkelling, sailing and surfing, ocean activities) while on trips.

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

	Visited a Casino	Did Not Visit a Casino	Pleasure Travelers	Index
Size of Market	4,777,777	13,661,731	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	56.6%	45.7%	48.5%	117
Wildlife Viewing	47.0%	39.2%	41.2%	114
Boating & Swimming (e.g., motorboating, swimming in lakes)	45.9%	39.4%	41.1%	112
Hiking, Climbing & Paddling	34.2%	34.0%	34.1%	100
Sports & Games (e.g., tennis, board games)	31.5%	19.6%	22.7%	139
Fishing	28.0%	22.1%	23.6%	119
Golfing	27.4%	15.1%	18.3%	150
Exercising & Jogging	21.4%	13.9%	15.9%	135
Downhill Skiing & Snowboarding	17.0%	13.8%	14.6%	116
Team Sports (e.g., hockey, baseball)	15.9%	9.8%	11.4%	140
Skating (e.g., ice skating, rollerblading)	15.2%	10.8%	12.0%	127
Snowmobiling & ATVing	14.0%	10.4%	11.3%	123
Cycling	13.5%	13.5%	13.5%	100
Cross-country Skiing & Snowshoeing	8.8%	9.5%	9.3%	95
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	8.0%	5.7%	6.3%	127
Horseback Riding	5.8%	4.6%	4.9%	118
Hunting	4.8%	4.7%	4.7%	102
Freshwater Scuba & Snorkeling	4.3%	2.6%	3.0%	142
Motorcycling	3.3%	2.9%	3.0%	110
Wilderness Activities (e.g., wilderness skills course)	3.2%	2.1%	2.4%	137
Extreme Air Sports (e.g., parachuting)	1.5%	1.0%	1.1%	131

### Outdoor Activities Pursued in a Typical Year

Similar to the typical Canadian Pleasure Traveler, Casino Visitors frequently go on day outings to parks, swim, exercise and garden at home. Relative to the average Canadian Pleasure Traveler they are especially likely to go golfing. On the other hand, they are less likely to take part in nature-oriented activities such as hiking or canoeing or kayaking. They are also less likely to participate in most winter activities such as cross-country skiing, snowboarding, ice skating and snowmobiling.

Fig. 9 Outdoor Activities Pursued in a Typical Year

	Visited a Casino	Did Not Visit a Casino	Pleasure Travelers	Index
Size of Market	4,777,777	13,661,731	18,439,508	100
Day outing to a park	69.2%	66.1%	66.9%	103
Exercising at home or at a fitness club	64.8%	59.7%	61.0%	106
Swimming	62.2%	59.6%	60.3%	103
Gardening	60.6%	59.5%	59.8%	101
Picnicking	53.7%	52.8%	53.1%	101
Hiking	45.8%	49.8%	48.8%	94
Cycling	41.5%	45.3%	44.3%	94
Camping	38.6%	38.6%	38.6%	100
Golfing	38.1%	26.3%	29.4%	130
Fishing	31.6%	28.5%	29.3%	108
Sailing or other boating	27.4%	22.1%	23.4%	117
Playing team sports	27.0%	21.5%	22.9%	118
Ice-skating	26.6%	29.2%	28.5%	93
Jogging	25.8%	23.5%	24.1%	107
Playing racquet sports (e.g., tennis or badminton)	18.9%	19.2%	19.1%	98
Downhill skiing	16.5%	16.1%	16.2%	102
Canoeing or kayaking	15.8%	17.3%	16.9%	94
Rollerblading	15.6%	14.0%	14.4%	108
Riding an all-terrain vehicle (ATV)	14.2%	14.3%	14.3%	99
Cross-country skiing	9.9%	13.4%	12.5%	79
Snowmobiling	9.6%	9.8%	9.8%	98
Hunting	7.8%	7.7%	7.7%	101
Horseback riding	7.1%	6.7%	6.8%	104
Snowboarding	4.8%	5.1%	5.0%	95
Skateboarding	1.4%	1.7%	1.6%	86

### Accommodation Stayed In While on a Trip

Those who visited a casino while on trips were most likely to have stayed in public or private campgrounds or resorts (lakeside or riverside resorts, seaside resorts) in the last two years. Relative to the average Canadian Pleasure Traveler, this activity segment was especially likely to have stayed in seaside resorts and lakeside or riverside resorts. They were also more likely than others to have used a motorhome or recreational vehicle (RV) when traveling, to have stayed at a farm or guest ranch and to have stayed at a health spa.

Fig. 10 Accommodation Stayed in While on Trips

	Visited a Casino	Did Not Visit a Casino	Pleasure Travelers	Index
Size of Market	4,777,777	13,661,731	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	29.2%	25.3%	26.4%	111
Lakeside / Riverside Resort	28.9%	20.0%	22.3%	129
Seaside Resort	27.8%	18.3%	20.7%	134
A Private Campground	21.8%	17.7%	18.8%	116
Ski Resort or Mountain Resort	16.7%	13.0%	13.9%	119
A Camp Site in a Wilderness Setting (Not a Campground)	9.5%	8.3%	8.6%	111
Health Spa	8.4%	5.1%	5.9%	141
Wilderness Lodge You Can Drive to by Car	7.0%	5.2%	5.6%	124
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	6.8%	3.7%	4.5%	153
Country Inn or Resort with Gourmet Restaurant	6.3%	4.7%	5.1%	124
Farm or Guest Ranch	4.3%	2.6%	3.0%	142
Remote or Fly-In Wilderness Lodge	2.1%	1.4%	1.6%	131
On a Houseboat	1.8%	1.2%	1.4%	132
Remote or Fly-In Wilderness Outpost	0.7%	0.5%	0.6%	121
Cooking School	0.4%	0.3%	0.4%	123
Wine Tasting School	0.3%	0.3%	0.3%	106

### Tours and Cruises Taken During Past Two Years

Casino Visitors were more likely than the average Canadian Pleasure Traveler to take tours and cruises in the past two years. They most often took sameday tours (both guided and self-guided), city tours and scenic countryside drives. However, this segment was three times more likely than average to have taken a casino tour. They were also more likely to have taken guided, overnight tours (both multi-location and single location).

Casino Visitors were also more likely than others to have taken ocean cruises (e.g., a Caribbean cruise, an Alaskan cruise) and freshwater cruises (e.g., Great Lakes cruise, cruises of a lake or river) during the past two years.

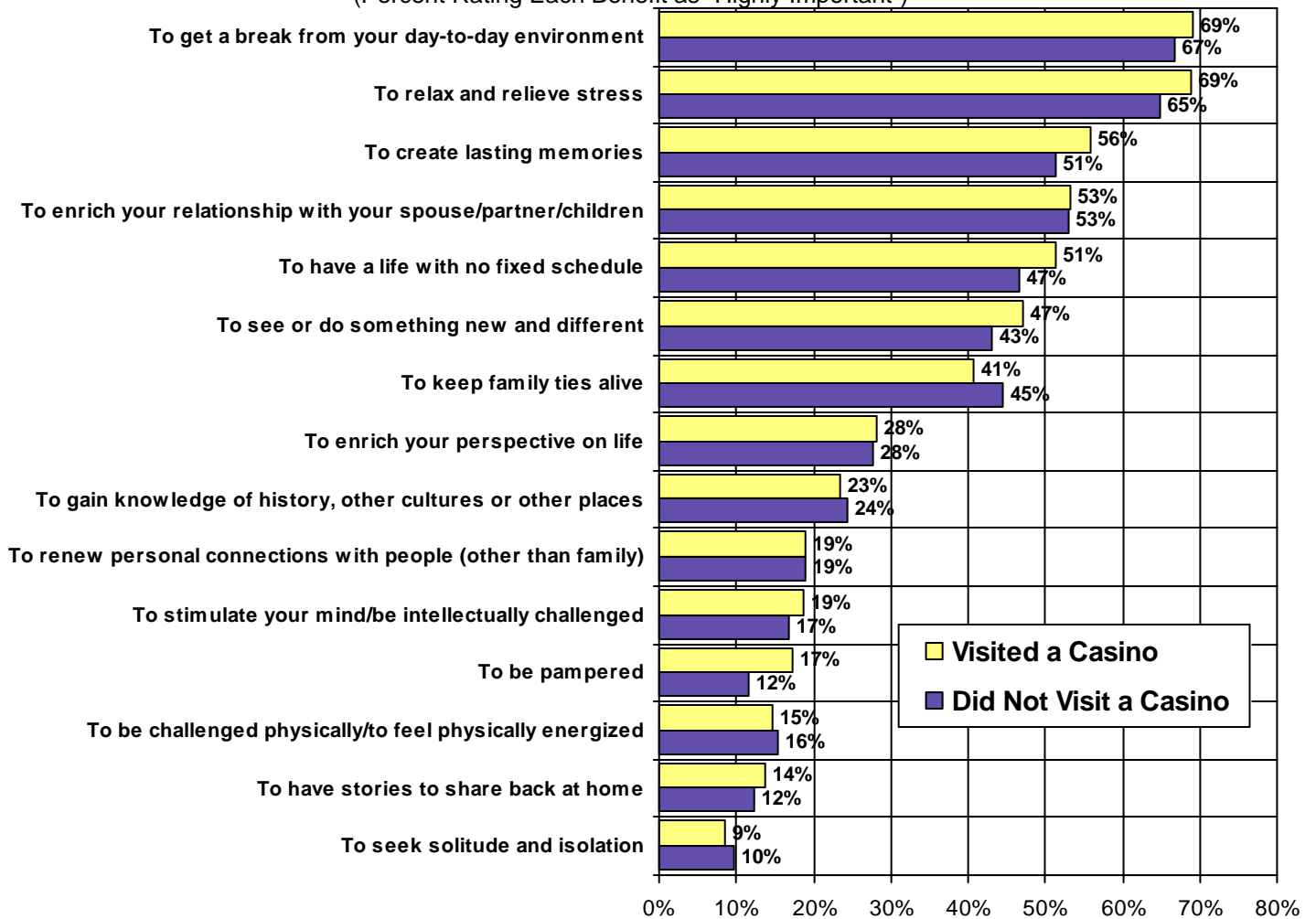
Fig. 11 Tours and Cruises Taken During Past Two Years

	Visited a Casino	Did Not Visit a Casino	Pleasure Travelers	Index
Size of Market	4,777,777	13,661,731	18,439,508	100
A self-guided, sameday tour while on an overnight trip	35.9%	27.0%	29.3%	122
An organized, sameday, guided tour while on an overnight trip	30.4%	19.4%	22.2%	137
Around the city	30.2%	21.0%	23.4%	129
Around the countryside - scenic drives	27.8%	20.6%	22.4%	124
A self-guided, overnight tour where you stayed in different locations	22.2%	16.7%	18.1%	123
On the water (sightseeing cruise)	20.0%	10.7%	13.1%	153
To a casino	19.9%	1.8%	6.5%	305
An organized, overnight, guided tour where you stayed in different locations	14.9%	8.4%	10.1%	148
Wilderness tour	14.5%	12.5%	13.0%	111
An organized, overnight, guided tour where you stayed in a single location	13.1%	6.0%	7.8%	167
Some other type of tour	11.9%	9.1%	9.8%	121
Caribbean ocean cruise	9.8%	3.9%	5.4%	182
To a winery	8.6%	4.6%	5.6%	152
Ocean cruise – Other	5.3%	2.6%	3.3%	159
To a factory	4.5%	2.0%	2.6%	169
Cruise on another lake or river	3.2%	2.1%	2.4%	135
In the air as a pilot or passenger of an airplane or helicopter	3.2%	1.4%	1.9%	169
Alaskan ocean cruise	2.8%	1.2%	1.6%	171
Some other type of cruise	2.5%	1.3%	1.6%	158
Cruise on the St. Lawrence River	2.2%	1.9%	1.9%	112
Great Lakes cruise	1.3%	0.6%	0.8%	169
Submarine cruise	0.3%	0.1%	0.1%	241

**Benefits Sought While On a Vacation**

As with the majority of Canadian Pleasure Travelers, Casino Visitors take vacations to get a break from their day-to-day environment, to relax and relieve stress, to create lasting memories, to enrich family relationships and to live without a fixed schedule. However, relative to the typical Canadian Pleasure Traveler, Casino Visitors are especially likely to seek vacations that are relaxing (e.g., get a break, relax & relieve stress, no fixed schedule) and allow them to be pampered.

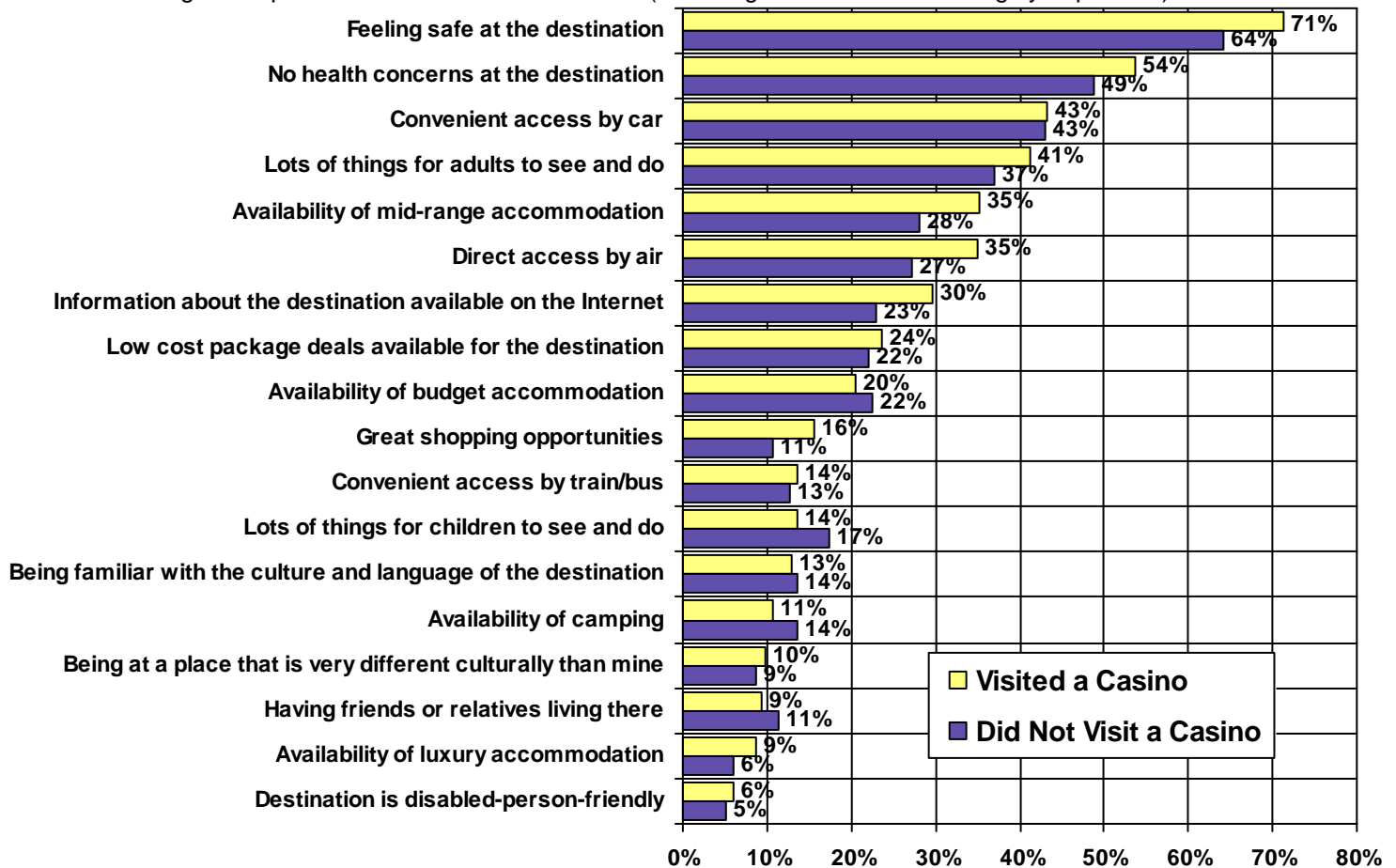
Fig.12 Benefits Sought While On a Vacation  
(Percent Rating Each Benefit as “Highly Important”)



**Other Attributes of a Destination Considered Important**

As with most Canadian Pleasure Travelers, Casino Visitors consider it important to feel safe while on vacation. They also consider it important that a destination has no health concerns. Relative to the average Canadian Pleasure Traveler, Casino Visitors consider it more important that a destination is directly accessible by air, offers mid-range priced accommodation, has information about the destination readily available on the Internet and offers great shopping opportunities.

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



### How Destinations are Selected

Similar to the average Canadian Pleasure Traveler, Casino Visitors tend to start planning trips with a particular destination in mind. However, this activity segment can be expected to exhibit an above-average response to discount travel packages.

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

	Visited a Casino	Did Not Visit a Casino	Pleasure Travelers	Index
Size of Market	4,777,777	13,661,731	18,439,508	100
<b>Summer</b>				
Started with a desired destination in mind	49.6%	48.1%	48.5%	102
Started by considering specific activities wanted to do	13.0%	14.1%	13.8%	94
Started with a certain type of vacation experience in mind	24.2%	23.6%	23.7%	102
Looked for packaged deals - no destination in mind	2.2%	1.0%	1.3%	168
Considered something else first	3.5%	4.6%	4.3%	82
Don't know / Other	7.5%	8.7%	8.4%	89
<b>Winter</b>				
Started with a desired destination in mind	51.6%	47.4%	48.6%	106
Started by considering specific activities wanted to do	15.6%	15.6%	15.6%	100
Started with a certain type of vacation experience in mind	17.5%	20.0%	19.3%	91
Looked for packaged deals - no destination in mind	3.8%	3.0%	3.2%	118
Considered something else first	3.4%	5.2%	4.7%	72
Don't know / Other	8.2%	8.8%	8.6%	94

### Trip Planning and Information Sources Consulted

The majority of Casino Visitors were responsible for planning trips either on their own (42.9%) or with someone else (16.7%). When making vacation plans, the majority use the Internet, word-of-mouth and past experiences. However, they are more likely than others to obtain trip planning information from television advertising and programs, newspaper advertising, direct mail and email advertising, travel agents, auto clubs and trade, travel or sports shows. They are less likely to use travel guides, such as Fodor's to plan their vacations.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Visited a Casino	Did Not Visit a Casino	Pleasure Travelers	Index
	Size of Market	4,777,777	13,661,731	18,439,508	100
Who Plans Trips?	Respondent plans trips	42.9%	41.7%	42.0%	102
	Trip planning a shared responsibility	16.7%	16.3%	16.4%	102
	Someone else plans trips	40.4%	42.0%	41.5%	97
Information Sources Consulted	An Internet website	70.4%	63.4%	65.2%	108
	Advice of others / Word-of-mouth	55.1%	49.7%	51.1%	108
	Past experience / Been there before	55.0%	48.8%	50.4%	109
	A travel agent	41.3%	31.6%	34.1%	121
	Maps	33.8%	32.1%	32.6%	104
	Official travel guides or brochures from state / province	29.3%	24.8%	26.0%	113
	Articles in newspapers / magazines	25.8%	19.1%	20.9%	124
	Visitor information centres	24.9%	22.8%	23.4%	107
	An auto club such as CAA	21.9%	16.1%	17.7%	124
	Advertisements in newspapers / magazines	19.9%	12.2%	14.3%	140
	Travel guide books such as Fodor's	13.0%	13.9%	13.6%	95
	Travel information received in the mail	11.8%	7.8%	8.8%	133
	Programs on television	10.9%	6.3%	7.5%	146
	Advertisements on television	7.6%	4.0%	5.0%	153
	An electronic newsletter or magazine received by e-mail	5.6%	3.7%	4.2%	135
Visits to trade, travel or sports shows	5.3%	2.3%	3.1%	170	

### Use of the Internet to Plan and Arrange Trips

Relative to the other culture and entertainment activity types, Casino Visitors are less likely to use the Internet to plan (64.8%) and book (42.0%) travel. They were the 17<sup>th</sup> most likely to plan travel over the Internet and the 18<sup>th</sup> most likely to have booked travel online during the past two years. The majority use hotel or resort websites, travel planning and booking websites such as Expedia and airline websites. However, they are also more likely than average to use cruise line websites. The most commonly purchased trip components over the Internet were accommodation and airline tickets. They were also more likely than average to have booked a trip package online.

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

		Visited a Casino	Did Not Visit a Casino	Pleasure Travelers	Index
Size of Market		4,777,777	13,661,731	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	35.2%	42.8%	40.8%	86
	Uses Internet to plan trips only	22.8%	21.9%	22.1%	103
	Uses Internet to book part of trip	42.0%	35.3%	37.0%	113
Types of Websites Consulted	A website of a hotel or resort	62.6%	54.8%	57.0%	110
	A travel planning / booking website	55.4%	41.8%	45.7%	121
	An airline website	50.9%	44.5%	46.3%	110
	A tourism website of a country / region / city	49.6%	49.9%	49.8%	100
	A website of an attraction	35.0%	34.3%	34.5%	101
	Some other website	26.7%	27.9%	27.6%	97
	A cruise line website	12.3%	6.4%	8.1%	153
	A motorcoach website	3.1%	2.2%	2.5%	127
Parts of Trips Booked Over The Internet	Accommodation	74.0%	67.1%	69.2%	107
	Air tickets	70.8%	68.9%	69.5%	102
	Car rental	28.7%	26.5%	27.1%	106
	Tickets or fees for specific activities or attractions	28.4%	21.6%	23.6%	120
	A package containing two or more items	21.3%	13.0%	15.4%	138
	Tickets for rail, bus or boat/ship fares	16.9%	14.7%	15.3%	110
	Other	4.6%	3.7%	3.9%	116

### Media Consumption Habits

Casino Visitors are avid consumers of travel-related media in all formats, including the travel sections of daily and weekend newspapers, travel magazines, travel websites and travel shows on television. They are also more likely than the average Canadian Pleasure Traveler to consume sports-related media (e.g., professional sports magazines, sports magazines, sports on television, all-sports radio, sports websites). This segment may also be reached through games websites.

Fig. 17 Media Consumption Habits

		Visited a Casino	Did Not Visit a Casino	Pleasure Travelers	Index
Size of Market		4,777,777	13,661,731	18,439,508	100
Newspaper Readership	Reads daily newspaper	90.8%	86.0%	87.3%	104
	Reads weekend edition of newspaper	90.7%	86.1%	87.3%	104
	Reads local neighbourhood or community newspapers	65.5%	60.2%	61.5%	106
	Reads other types of newspapers	20.2%	16.1%	17.2%	117
	Frequently or occasionally reads travel section of daily newspaper	55.4%	42.3%	45.7%	121
	Frequently or occasionally reads travel section of weekend newspaper	56.0%	44.3%	47.3%	118
Types of Magazines Read (Top 5 Indexed)	Travel (e.g., Condé Nast)	15.9%	10.3%	11.8%	136
	Professional sports	11.5%	7.5%	8.5%	135
	Business, finance and investing	20.6%	14.8%	16.3%	126
	Outdoor activities / sports	15.9%	11.8%	12.8%	124
	Entertainment and music	39.2%	30.1%	32.4%	121
Type of Television Programs Watched (Top 5 Indexed)	Shopping channels	6.5%	3.9%	4.6%	142
	Travel shows	35.5%	28.5%	30.3%	117
	Reality shows (e.g., Canadian Idol)	45.7%	37.7%	39.8%	115
	Biography	47.8%	40.4%	42.3%	113
	Sports/sports shows	47.7%	41.8%	43.3%	110
Type of Radio Programs Listened To (Top 5 Indexed)	All sports	13.3%	10.3%	11.1%	120
	Top 40/Current hits	29.8%	23.5%	25.2%	118
	Oldies (50s, 60s, 70s, 80s)	40.5%	32.4%	34.5%	117
	Country music	27.9%	22.4%	23.8%	117
	Soft music / Adult contemporary	30.0%	24.3%	25.7%	117
Types of Websites Visited (Top 5 Indexed)	Games	40.2%	30.2%	32.8%	122
	Travel	60.3%	47.0%	50.6%	119
	Sports	30.7%	25.5%	26.9%	114
	Entertainment	57.8%	49.3%	51.5%	112
	Shopping (all types)	36.7%	32.3%	33.5%	109



<b>Appendix One</b>		
<b>Canadian TAMS 2006 Culture and Entertainment Segmentation</b>		
<b>Activity Segment</b>	<b>Activities in Segment</b>	
<b>Agro-Tourism</b>	Dining At A Farm	Harvesting and /or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	
<b>National &amp; International Sporting Events</b>	Curling Bonspiel	National /International Sporting Events such as the Olympic Games
	Professional Figure Skating	
<b>Gardens Theme Attractions</b>	Garden Theme Park	Botanical Gardens
<b>Amateur Tournaments</b>	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related
<b>Musical Concerts, Festivals &amp; Attractions</b>	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
<b>Comedy Festivals &amp; Clubs</b>	Comedy Festivals	Stand-up Comedy Clubs & Other Variety Shows

