Ontario

Ministry of Tourism

Shopping

An analysis of the shopping segments from the Travel Activities and Motivations Survey (TAMS)

The U.S. and Ontario Markets

May 2007

Tourism Research Unit

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EXECUTIVE SUMMARY

Shopping, although not usually a trip-motivator, is an important activity that 66% of travellers from the U.S. and 70% of those from Ontario engage in while at a destination.

Beyond shopping while they travel, many of these travellers also indicated that great shopping opportunities were highly important to them when choosing a destination for their pleasure or vacation trip. This would suggest that shopping opportunities should be featured in promotional materials.

The shopping segments examined and discussed in the current report include those visitors who browsed or shopped for the following:

- **Clothing segment:** for clothing, shoes and jewellery
- **Books & music segment:** bookstores or music stores
- **Antiques segment:** antiques
- **Gourmet food segment:** gourmet foods in retail stores
- **Arts & crafts segment:** local arts & crafts studios or exhibitions
- **Garden centre segment:** greenhouse or garden center

The segment that engages in shopping for clothes, shoes and jewellery is the largest among all the shopping segments, but participates in the fewest number of other activities while on a trip. This segment, and to some extent the books & music segment, only want to shop, eat at restaurants, visit local cafes and stroll around the city to observe its architecture and buildings. These activities are also common to a majority of the members of all shopping segments. Other activities that were popular in each of the shopping segments (participation rate of almost 50% or more) were visiting well-known historic sites and going to casinos.

Given the activities that are common to a majority of shoppers and the fact that all shopping segments expect that the destinations they visit be safe and offer lots for adults to see and do, an optimal city design from their perspective would involve neighbourhoods that offer the following:

- Diversified browsing and shopping opportunities (from clothes to books and antiques to gourmet foods) within walking distance;
- A streetscape layout with storefront displays, conducive to browsing and shopping while strolling around to observe buildings and architecture; and
- An integration of shopping opportunities, various dining options and other points of interests within walking distance of each other in order to minimize inconvenience and to contribute to “feeling safe at the destination” (a feeling that is not always present in exclusively shopping-focused areas that look deserted after the stores are closed).

In looking at the relationship between participation in shopping and demographic variables, we see a decline in the incidence of shopping after the age of 65 for U.S. travellers. As a matter of fact, this relationship between age and activity participation holds for all U.S. travellers across all activity categories.

Interestingly, the declining relationship between age and participation in any activity observed in the U.S. travellers also holds for Ontario travellers, but the decline can be seen occurring much earlier, between 45 and 54 years of age.

As the household income of travellers in the various shopping segments increases, so does their incidence of any form of shopping. On the other hand, as age increases, the incidence of shopping for antiques, arts & crafts, gourmet foods and garden-related items increases while the incidence of shopping for clothes, shoes and jewellery decreases and the incidence of shopping for books & music remains relatively constant. Notwithstanding this decrease, the incidence of shopping for clothing, shoes and jewellery remains the highest compared to other forms of shopping at any age.

As with most other travellers, shoppers travel to relieve stress and to take a break from their day-to-day activities. They also seem more interested than other travellers in creating lasting memories and in seeing or doing something new and different.

All the shopping segments from the U.S. have a better opinion of Ontario than the average U.S. traveller, with the gourmet and garden segments having the highest rating of the province. Ontario's shopping segments have a marginally better opinion of Ontario than the average Ontario traveller, except the books & music segment. The garden segment, however, has a significantly higher rating of Ontario and also believes strongly that there are many good reasons to visit the province.

INTRODUCTION

This report is based on the 2006 Travel Activities and Motivations Survey (TAMS), which examines the recreational activities and travel habits of Canadians and Americans over the past two-year period (2004 and 2005). The survey provides detailed information on travellers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, demographics and media consumption patterns.

TAMS examines activities and behaviours relating to trips of one or more nights.

TAMS was sponsored by the following organizations:

Ontario Ministry of Tourism
Ontario Tourism Marketing Partnership
Canadian Tourism Commission
Atlantic Canada Opportunities Agency
Department of Canadian Heritage
Parks Canada
Statistics Canada
Quebec Ministry of Tourism
Tourism Manitoba
Tourism Saskatchewan
Alberta Economic Development
Tourism BC
Government of Yukon
Government of Northwest Territories

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

The Canadian survey consisted of a telephone and a mail back survey:

- The household response rate on the telephone was 65.4%.
- The paper questionnaire response rate was 53.5%.
- The Canadian database consists of 53,150 completed records from the telephone survey and 24,692 completed paper questionnaires.

The U.S. TAMS consisted only of a mail back survey as it used an existing panel.

- The panel's response rate for this survey was 71.3%.
- The U.S. database consists of 60,649 completed responses

For this report, the sample size was as follows:

Shopping/browsing for:	Any shopping	Clothing, shoes & Jewellery	Books & Music	Antiques	Gourmet foods	Local Arts & Crafts	Garden items
	Number of records in the database						
U.S. survey	31,3076	23,237	16,230	10,899	7,424	15,956	5,046
Canadian survey – Ontario residents	5,823	4,494	3,286	2,058	1,422	3,212	1,405

The group of travellers who went shopping for clothing, shoes and jewellery will henceforth be referred to as the "clothing segment", the travellers who shopped for books and music as the "books segment," antiques shoppers as the "antique segment", etc.

THE U.S. MARKET

How large is this market?

66% of American travellers, or 117 million, engaged in some of the shopping activities included in the TAMS questionnaire while on a trip. Only 2.4% of all American travellers (or 3.7% of those who participated in shopping) engaged in all of these shopping activities.

Table 1: American travellers who engage in shopping while on a trip By type of shopping activity

	Activity: Shopping or Browsing					
	Clothing segment	Books or music segment	Antiques segment	Gourmet foods segment	Local arts & crafts segment	Greenhouse or garden segment
Number of travellers engaging in activity (000s)	85,011	59,194	40,076	27,033	57,244	18,477
As % of total travellers	**48%**	**34%**	**23%**	**15%**	**32%**	**10%**
Other shopping activities participated in:						
Clothing, shoes & jewelry stores	100%	74%	69%	80%	71%	78%
Books or music stores	52%	100%	61%	71%	56%	68%
Antiques	4%	5%	100%	7%	5%	9%
Gourmet foods in retail stores	25%	32%	35%	100%	31%	46%
Local arts & crafts studios or exhibitions	48%	54%	63%	66%	100%	67%
Greenhouse or garden centre	17%	21%	26%	32%	22%	100%

Shopping or browsing for clothing, shoes and jewellery stores is the most popular shopping activity for travellers, accounting for 48% of all American travellers. Furthermore, the majority of the travellers who engage in other forms of shopping also engage in shopping for clothes, shoes and jewellery. The same is also true for shopping for books and music. That is, the majority of travellers who in any form of shopping also engage in shopping for books and music.

The gourmet foods, the garden and the antiques segments are the one most dedicated to shopping (highest incidence across many shopping types).

How important is shopping to travellers?

Although shopping is an important activity for a large number of American travellers when vacationing, it is not normally an activity that motivates their trips.

For example, as Table 2 shows, 11% of those in the clothing segment indicated that shopping for these items was the main purpose for taking some of their trips. Meanwhile, still looking at those in the clothing shopping segment, 4% indicated that shopping for books or music was the main purpose for taking some of their trips, 4% indicated that shopping for antiques motivated some of their trips, 2% indicated that shopping for gourmet foods at retail shops motivated some of these trips, etc.

Table 2: Percent of American travellers for whom a shopping activity was the main purpose of taking some of the trips in which this shopping activity occurred

	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Number who participated in activity (000s)	85,011	59,194	40,076	27,033	57,244	18,477
Percent that indicated the activity below was the main purpose for taking some of these trips						
Clothing, shoes, jewellery stores	11%	8%	8%	10%	6%	11%
Books or music stores	4%	8%	6%	7%	5%	8%
Antiques stores	4%	5%	12%	7%	5%	9%
Gourmet foods in retail stores	2%	3%	4%	9%	3%	6%
Local arts & crafts stores	4%	5%	7%	7%	9%	9%
Greenhouse or garden centre	2%	3%	3%	4%	3%	13%

The TAMS survey also captured the importance of shopping at the trip-planning stage. Respondents were asked to rate various conditions that they considered when choosing a destination for a pleasure trip. Among the conditions that respondents had to rate was "great shopping opportunities".

Table 3: Importance of shopping opportunities when choosing a destination

Scale	All travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Highly important	16%	23%	19%	18%	23%	18%	21%
Somewhat important	47%	53%	50%	51%	50%	50%	49%
Of no importance	36%	25%	31%	30%	27%	32%	30%

Overall, 16% of American travellers rated "great shopping opportunities" as a highly important condition when choosing a pleasure destination, while the ratings varied from a low of 18% for those who shop for local arts and crafts or antiques to a high of 23% for those who shop for clothing or gourmet foods.

In summary, though shopping is not a trip-motivator in many instances, it is an activity that many travellers participate in while at a destination and one which is an important consideration at the trip planning stage. As such, it is not only the actual shopping opportunities that a destination offers that are important to this segment, but also their perception of a destination's shopping opportunities. This suggests that shopping opportunities should be featured in communications material.

Are there any other activities that act as trip-motivators for these shopping segments?

The top 10 trip-motivating activities for each of the shopping segments are listed in Table 4. For all of the shopping segments, single activities do not in general act as trip-motivators. Going to an amusement park appears to be the activity with the highest incidence of being a trip motivator for all the shopping segments.

Table 4: Top 10 other activities acting as main reasons for taking any of the trips that contained shopping activities

Activity	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Going to an amusement park	29%	28%	20%	29%	25%	27%
Sunbathing/sitting on a beach	22%	20%	16%	23%	22%	22%
Going to a casino	20%	18%	16%	22%	18%	22%
Visiting national/provincial nature park	16%	19%	16%	21%	20%	25%
Shopping for clothing, shoes, jewellery	15%					
Swimming in the ocean	15%	15%	11%	16%	15%	17%
Visiting well-known historic site/buildings	13%	15%	13%	17%	16%	19%
Going to a seaside resort	13%	13%	10%	15%	14%	17%
Strolling around a city to see its architecture	12%	14%	12%	18%	15%	18%
Visiting well-known natural wonders	11%	13%	12%	16%	15%	19%
Dining at restaurants offering local recipes & ingredients				15%		
Visiting a public campground		12%				
Shopping for antiques			12%			
Visiting local cafes					12%	
Shopping at garden centres						17%

What else do the shopping segments like to do when travelling?

Table 5 shows the activities where at least one-third of the members of each shopping segment participated in while on a trip. The clothing segment seems to have participated in the fewest number of different activities while on a trip, followed by the books segment. In fact, these two segments appear to primarily want to engage in shopping, dining at restaurants that offer local cuisine and strolling around a city to observe its buildings and architecture (perhaps another form of window shopping?).

Table 5: Activities engaged in by at least one third of the shopping segments while travelling

Activity	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Shopping - Clothing, Shoes, Jewellery	100%	74%	69%	80%	71%	78%
Dining - Restaurants with local recipes & ingredients	73%	77%	76%	85%	79%	80%
Shopping - Books/Music stores	52%	100%	61%	71%	56%	68%
Shopping - Local Arts & Crafts	48%	54%	63%	66%	100%	67%
Strolling around a city to see its architecture	43%	50%	53%	58%	53%	56%
Visiting a casino	42%	41%	45%	49%	43%	47%
Visiting local outdoor cafes	41%	47%	49%	61%	50%	53%
Amusement park	40%	41%	39%	43%	38%	40%
Visiting a well-known historic site/buildings	38%	46%	49%	52%	48%	51%
Sunbathing/Sitting on a beach	38%	36%	37%	41%	40%	40%
Going to the movies / cinema	38%	45%	39%	45%	37%	47%
Swimming in the ocean	35%	35%	34%	40%	38%	37%
Dining - other high-end restaurants	35%	37%	37%	50%	37%	40%
Shopping – antiques		41%	100%	52%	44%	56%
Visiting other historic sites/buildings		39%	42%	45%	41%	45%
Visiting a nature park-national/provincial		38%	40%	40%	40%	45%
Going to an aquariums				34%		36%
Visiting a well-known natural wonders			35%	38%	36%	40%
Going to the zoo						37%
Shopping -- retail gourmet foods			35%	100%		46%
Shopping-- farmers' markets/ country fair			37%	40%	33%	46%
Visiting a seaside resort				33%		
Visiting a museum			35%	36%	33%	37%
Shopping - greenhouse/garden centre						100%
Wineries - day visits for tasting				37%		33%
Viewing a firework display						34%
Dining - High-end restaurants of international reputation				40%		
Visiting an art gallery				34%		
Visiting Botanical gardens						34%

The gourmet foods segment and the garden segment are the most active shopping segments. However, there are some significant differences between the two groups: The gourmet foods segment likes to eat in local as well as in high-end restaurants, and they like to visit local cafes, wineries, art galleries and seaside resorts in significantly larger numbers than the garden segment does. They are less likely to visit parks, zoos, and botanical gardens or to view firework displays. They appear to have less interest in activities that normally appeal to families travelling with children.

Apart from shopping, there are only a few activities for which the participation rate for the shopping segment has reached 50% or more. Among these activities, only a few are common to all shopping segments: dining and walking around the city to observe its buildings and architecture (with the exception of the clothing segment which did not achieve this level of participation for this activity).

The above discussion would imply that, from a tourism perspective, a vertical integration of neighbourhoods, especially with respect to shopping and dining establishments, is preferable to homogeneous neighbourhoods. Integration of neighbourhoods would also address the shopping segments' requirement of "feeling safe at the destination" since diversified neighbourhoods are always busy with people, a situation that is not always true of, for example, exclusively shopping-focused areas that look deserted after the stores are closed.

What else do these shopping segments expect from a destination?

All shopping segments expect two to three of the following conditions to be met by a destination:

- the destination has to be safe or at least give them the feeling of safety;
- the destination has to have lots of things for adults to do; and
- the destination has to be conveniently accessible by car (see Table 6).

In addition, all shopping segments tend to keep an eye on the trip costs, with the travellers who shop for clothing, shoes and jewellery being the most budget-minded.

Table 6: Expectations of a pleasure destination – % of pleasure travellers

Shopping Segment	What is **highly important** to them about pleasure destinations
Clothing, Shoes & Jewellery *Safety, variety and convenience with a pinch of thriftiness*	**Primary importance (incidence of 50%+)** 1. Feeling safe at the destination (76%) 2. Lots of things for adults to do (52%) 3. Convenient access by car (51%) **Secondary importance (incidence of 33% to 50%** 1. No health concerns at the destination (46%) 2. Availability of mid-range accommodation (37%) 3. Availability of low cost package deals (33%)
Books & Music *Safety, variety and convenience with a smidgen of thriftiness*	**Primary importance (incidence of 50%+)** 1. Feeling safe at the destination (72%) 2. Lots of things for adults to do (51%) 3. Convenient access by car (50%) **Secondary importance (incidence of 33% to <50%)** 1. No health concerns at the destination (44%) 2. Availability of mid-range accommodation (36%)
Antiques *Safety, variety and convenience with a smidgen of thriftiness*	**Primary importance (incidence of 50%+)** 1. Feeling safe at the destination (74%) 2. Lots of things for adults to do (51%) 3. Convenient access by car (52%) **Secondary importance (incidence of 33% to <50%)** 1. No health concerns at the destination (44%) 2. Availability of mid-range accommodation (36%)
Gourmet Foods at Retail Stores *Safety and variety with a smidgen of convenience and thriftiness*	**Primary importance (incidence of 50%+)** 1. Feeling safe at the destination (73%) 2. Lots of things for adults to do (53%) **Secondary importance (incidence of 33% to <50%)** 1. Convenient access by car (46%) 2. No health concerns at the destination (44%) 3. Availability of mid-range accommodation (39%) 4. Information about the destination on the Internet (33%)
Local Arts & Crafts *Safety and variety with a smidgen of convenience and thriftiness*	**Primary importance (incidence of 50%+)** 1. Feeling safe at the destination (73%) 2. Lots of things for adults to do (53%) **Secondary importance (incidence of 33% to <50%)** 1. Convenient access by car (47%) 2. No health concerns at the destination (44%) 3. Availability of mid-range accommodation (37%)
Greenhouse & Garden Centres *Safety, variety and convenience with a smidgen of thriftiness*	**Primary importance (incidence of 50%+)** 1. Feeling safe at the destination (75%) 2. Convenient access by car (54%) 3. Lots of things for adults to do (52%) **Secondary importance (incidence of 33% to <50%)** 1. No health concerns at the destination (47%) 2. Availability of mid-range accommodation (36%)

In terms of their general attitudes (see Table 7), all of the shopping segments see themselves as having more energy than other people their age, with the garden segment having the most respondents that agree with this statement – hence their enthusiasm about gardening and walking around cities to observe their architecture.

With the exception of the clothing segment, all shopping segments have a higher incidence of wanting to visit undiscovered places than the average U.S. traveller. This fact could be explained by the motivation to find opportunities for "undiscovered" shopping, especially when it related to antiques.

Table 7: General Attitudes – % of total travellers

	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
"THE STATEMENT BELOW APPLIES VERY MUCH TO ME" (SCORE OF 4 OR 5 OUT OF 5)							
Prefer to visit undiscovered places	28%	**27%**	33%	38%	37%	36%	40%
Actively involved in rigorous fitness program	20%	**22%**	23%	21%	25%	22%	21%
Chance has little to do with success in life	31%	32%	33%	33%	33%	33%	35%
More energy than most people my age	34%	35%	36%	38%	39%	37%	41%
Often buy new products before they come down in price	17%	**19%**	20%	19%	23%	18%	19%
Make decisions quickly and easily	34%	35%	37%	37%	41%	36%	38%
"THE STATEMENT BELOW APPLIES VERY LITTLE TO ME" (SCORE OF 1 OR 2 OUT OF 5)							
Prefer Undiscovered Place	42%	43%	36%	31%	32%	33%	29%
Actively In Fitness Program	60%	57%	55%	58%	53%	56%	55%
Success Not Due To Chance	29%	29%	28%	28%	28%	27%	28%
More Energy Than Most	28%	26%	24%	23%	22%	24%	23%
Often Buy Before Price Drop	58%	55%	55%	56%	50%	56%	55%
Make Decisions Quickly	27%	26%	25%	25%	22%	25%	25%

What are the demographics of the shopping segments?

Compared to travellers in general, all the shopping segments have higher proportions of women than men, with the clothing segment having the highest proportion of women.

The antiques and garden segments are significantly older than the other shopping segments and older than overall U.S. travellers as well.

All shopping segments are better educated than the overall U.S. travellers, with the garden segment having perhaps the lowest education amongst them, perhaps related to the fact that members of this segment are generally older than the other segments and travellers in general.

The antiques and garden segments have significantly higher proportions of retired members than other segments or than the overall U.S. travellers. All shopping segments have household incomes higher than the average U.S. traveller, with the gourmet segment having the highest and the garden segment having one of the lowest – reflecting to some extent their high retirement ratio.

For all shopping segments, the vast majority live with a spouse or partner, with the individuals from the antiques and garden segments being the most likely to live with a partner. These two segments also have the lowest proportion of families with children younger than 18 years of age.

Table 8: Gender and age

Gender	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Males	49%	42%	48%	45%	45%	44%	43%
Females	51%	58%	52%	55%	55%	56%	57%
Age							
18-20	4%	4%	4%	2%	2%	3%	2%
21-25	8%	9%	9%	5%	6%	6%	4%
26-30	10%	12%	11%	8%	11%	9%	7%
31-35	11%	12%	12%	9%	12%	10%	8%
36-40	8%	8%	8%	8%	8%	8%	7%
41-45	9%	9%	9%	9%	9%	9%	9%
46-50	11%	10%	11%	12%	12%	12%	11%
51-55	10%	10%	11%	13%	12%	12%	13%
56-60	8%	8%	9%	11%	10%	10%	11%
61-65	6%	6%	7%	9%	8%	8%	10%
66-70	5%	4%	5%	6%	5%	6%	7%
71-75	4%	3%	3%	4%	3%	3%	5%
76 and over	5%	4%	3%	5%	3%	4%	5%
AVERAGE	45.6	44.1	44.5	48.5	46.3	46.9	50.6

Table 9: Education

Education – Highest level attained	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Some elementary or less	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%
Completed elementary school	0.3%	0.2%	0.2%	0.2%	0.2%	0.1%	0.2%
Some high school	3.1%	2.4%	2.0%	2.0%	1.7%	1.5%	2.1%
High school diploma	17.2%	15.6%	11.7%	14.0%	10.9%	11.9%	13.9%
Some trade/vocational	10.8%	10.1%	8.9%	10.5%	8.7%	9.1%	11.7%
Some university/college	18.4%	18.9%	18.5%	18.4%	17.3%	18.0%	17.5%
Trade/Vocational diploma	10.5%	10.7%	9.9%	11.5%	10.3%	10.2%	11.4%
Undergraduate degree/teachers' college	22.1%	23.4%	24.7%	22.6%	26.6%	25.5%	20.9%
Degree in the medical profession	0.8%	0.9%	1.0%	1.0%	1.1%	1.0%	1.1%
Earned doctorate or masters	12.6%	13.4%	17.6%	14.7%	17.8%	17.2%	15.4%
Some post-graduate but no degree	3.4%	3.7%	4.9%	4.5%	4.6%	4.9%	4.9%
Other	0.6%	0.6%	0.6%	0.6%	0.7%	0.6%	0.7%

Table 10: Employment Status

Employment status	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Work 30+ hours per week	52%	54%	54%	51%	54%	53%	47%
Work Part-Time (less than 30 Hours/Week)	8%	8%	8%	7%	7%	8%	7%
Self-employed	8%	8%	8%	9%	9%	9%	10%
Unpaid worker/family business	0%	0%	0%	0%	0%	0%	0%
Looking for work	2%	1%	1%	1%	1%	1%	1%
Going to school	5%	5%	5%	3%	3%	4%	2%
Caring for children (unpaid)	3%	3%	3%	3%	3%	3%	2%
Household work	2%	2%	2%	2%	2%	2%	3%
Retired	16%	13%	14%	18%	15%	16%	22%
Maternity/Parental Leave	0%	0%	0%	0%	0%	0%	0%
Long-Term illness/disability	3%	2%	2%	3%	2%	2%	3%
Other	2%	2%	2%	2%	2%	2%	2%

Table 11: Household Income

Household Income	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Under $20,000	10%	8%	8%	6%	6%	6%	7%
$20,000 to $39,999	19%	17%	16%	16%	13%	14%	16%
$40,000 to $59,999	19%	18%	18%	18%	16%	18%	19%
$60,000 to $79,999	16%	17%	17%	18%	16%	17%	18%
$80,000 to $99,999	13%	14%	14%	14%	15%	15%	13%
$100,000 to $149,999	16%	18%	18%	19%	22%	20%	18%
$150,000 to $249,999	6%	6%	7%	7%	8%	8%	6%
$250,000 or More	2%	2%	3%	3%	4%	3%	3%
Average	$65,094	$69,040	$71,277	$71,625	$78,232	$75,357	$69,332

Table 12: Household Composition

"Who do you live with?"	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Alone	12%	10%	11%	10%	11%	10%	11%
With spouse/partner	70%	71%	71%	77%	74%	75%	76%
With birth/step/adopted children 18+	16%	16%	15%	18%	16%	18%	19%
With birth/step/adopted children 17 or less	30%	31%	29%	26%	26%	28%	22%
With son-in-law or daughter-in-law	1%	1%	1%	1%	1%	1%	1%
With grandchildren	3%	3%	2%	3%	3%	2%	4%
With mother/step-mother	11%	11%	10%	7%	7%	7%	6%
With father/step-father	8%	8%	8%	5%	5%	5%	4%
With siblings	7%	8%	7%	4%	5%	5%	4%
With brother-in-law or sister-in-law	1%	1%	1%	1%	1%	1%	1%
With grandfather or grandmother	1%	1%	1%	1%	1%	1%	1%
With relative not listed above	3%	2%	2%	2%	2%	2%	3%
With lodger or boarder	1%	1%	1%	1%	1%	1%	1%
With roommates not listed above	4%	4%	4%	3%	4%	3%	3%

Is there a relationship between participation in shopping and demographic variables?

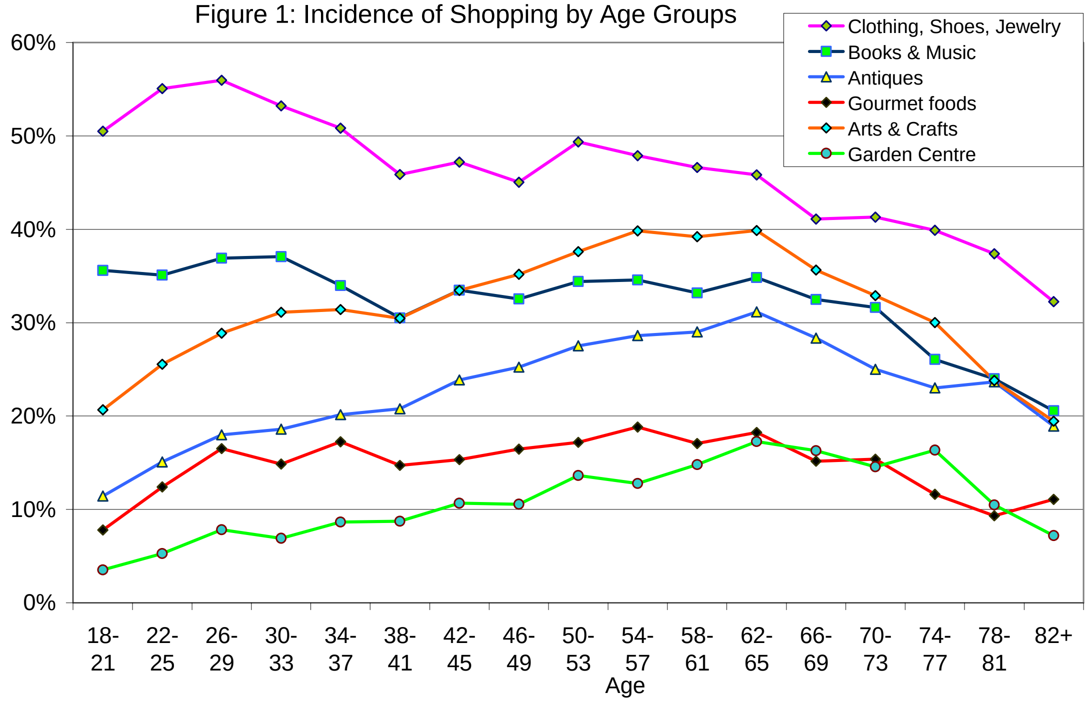
Figure 1 shows how participation in specific shopping activities varies with age. All shopping segments show a decline in the incidence of shopping after the age of 65.

However, while the clothing segment shows a continuous decline in shopping activity with the age of their members the other segments behave differently.

The books and music segment exhibits the same pattern as the clothing segment, but the decline is not as profound. Actually up to age 66 the incidence of shopping for books and music is almost constant.

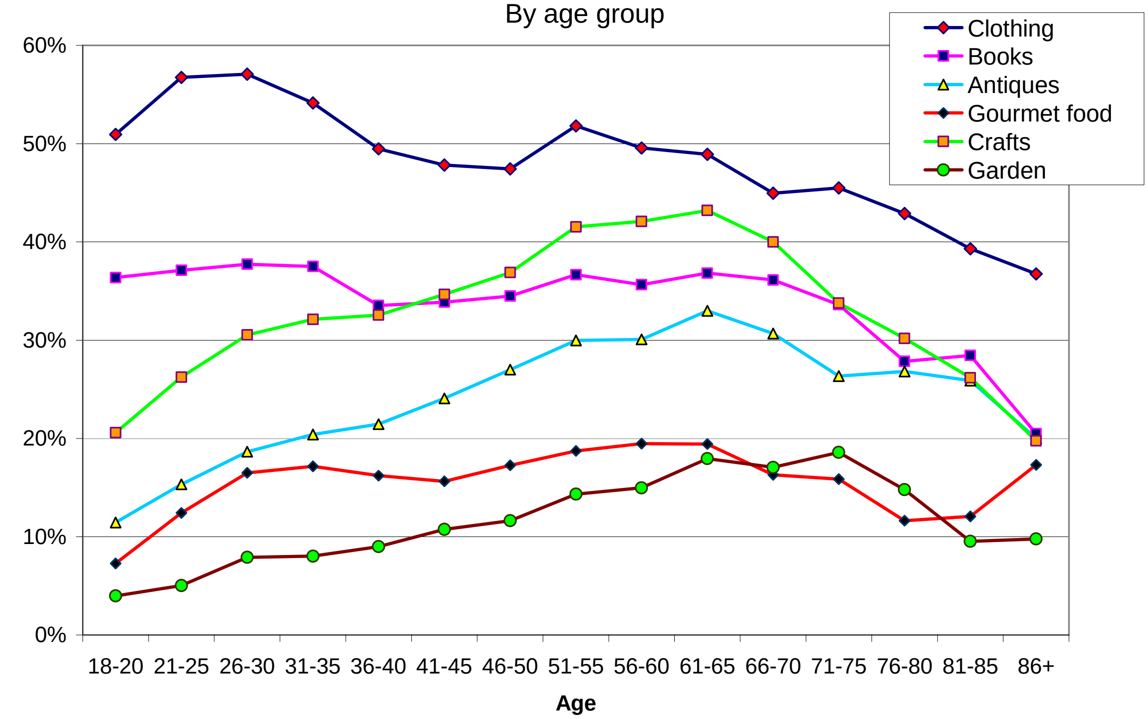
The remaining segments exhibit an increase in shopping activity up to age 62-65 and then they decline.

Figure 1: Incidence of Shopping by Age Groups



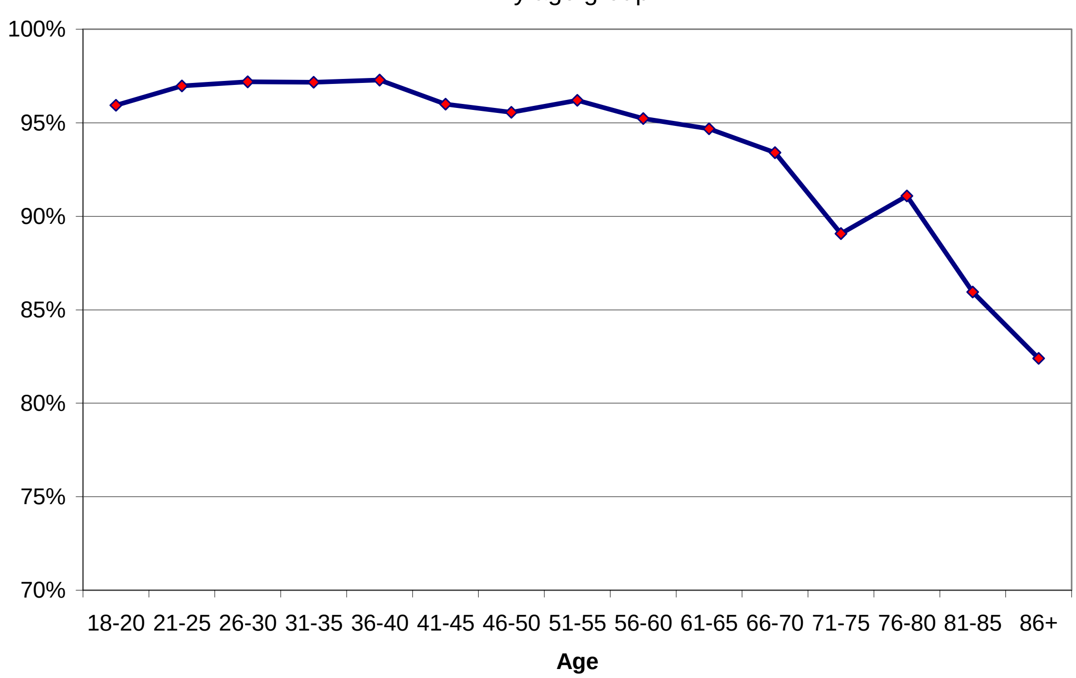
The above pattern is not only relevant to shopping but also to any other activity that these segments engage in. Figure 2 shows the relationship between age and participation in any activity by the members of each shopping segment. It can be seen there the pattern is identical to their participation in shopping.

Figure 2: Incidence of participation by U.S. travellers in any activity during an overnight trip
By age group



As a matter of fact, this relationship between age and activity participation holds irrespective of the group of travellers examined. Figure 3 shows this relationship for all travellers participating in any activity while on an overnight trip.

Figure 3: Incidence of participation in any activity while on an overnight trip
By age group



The question that arises at this stage is how much of this decline in the incidence of shopping, or any activity for that matter is due to the age of the traveller and how much is due to his/her income?

The following results were obtained from an analysis that looked into the simultaneous impact of age and income on the incidence of shopping:

- ***Clothing, Shoes & Jewellery segment***: As age increases, travellers in this segment shop less, but when income increases the travellers in this segment shop more. The age effect, however, is stronger than the income effect.
- ***Books & Music segment***: As age increases, travellers in this segment shop less, but when income increases, the travellers in this segment shop more. The age effect is equal to the income effect.
- ***Antiques segment***: As age and income increase, so does the incidence of shopping for antiques. The income effect is slightly stronger than the age effect.
- ***Gourmet Foods segment***: As age and income increase so does the incidence of shopping for gourmet foods. The income effect is slightly stronger than the age effect.
- ***Arts & Crafts segment***: As age and income increase so does the incidence of shopping for local arts and crafts. The income effect is stronger than the age effect.
- ***Garden Centres segment***: As age and income increase so does the incidence of shopping at garden centres. The age effect is stronger than the income effect.

What are the travel patterns of the various shopping segments?

The gourmet segment, having a higher household income than the other segments, has a higher incidence of travelling outside the United States than other travellers (see Table 13). The gourmet segment and the garden segment are the most enthusiastic about Canada and Ontario compared to other shopping segments or other U.S. travellers.

However, other annual studies conducted by Statistics Canada (International Travel Survey) reveal that the incidence of shopping of U.S. travellers to Ontario is significantly lower than their incidence of shopping in other parts of Canada or in other parts of the world (US In-Flight Survey).

The above would suggest that although the shopping segments have a better opinion about Ontario than other U.S. travellers, the province does not appear to provide them with the shopping venues that they are looking for. As such, Ontario may be losing opportunities within these market segments.

Table 13: Places Visited for Trips

	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
The United States	99.3%	99.4%	99.6%	99.5%	99.5%	99.3%	99.7%
Your Own State	79.4%	82.0%	84.8%	85.9%	86.0%	83.8%	87.1%
Elsewhere in the U.S.	89.7%	93.3%	94.3%	93.9%	95.5%	94.5%	94.5%
Canada	14.3%	16.1%	18.5%	18.6%	22.7%	19.9%	21.9%
Nova Scotia	1.3%	1.4%	1.8%	2.2%	2.2%	2.2%	2.3%
Quebec	3.0%	3.7%	4.5%	4.4%	5.7%	4.8%	5.3%
Ontario	8.1%	9.3%	10.2%	10.5%	12.8%	10.9%	11.8%
British Columbia	4.0%	4.6%	6.0%	5.9%	7.8%	6.5%	7.4%
Mexico	13.3%	16.6%	15.4%	17.0%	18.9%	18.6%	16.7%
South / Central America	3.3%	4.1%	4.7%	4.3%	5.8%	5.5%	5.1%
The Caribbean	12.4%	15.8%	14.2%	15.0%	19.0%	18.2%	15.3%
Europe	8.9%	11.2%	13.7%	12.9%	17.6%	14.5%	13.1%
Australia / New Zealand	0.9%	1.3%	1.4%	1.2%	1.9%	1.7%	1.5%
Asia	3.0%	3.6%	4.1%	3.4%	5.2%	4.3%	3.6%
Africa	0.7%	1.0%	1.0%	1.1%	1.3%	1.2%	1.3%
Some Other Destination	3.4%	4.2%	4.1%	4.1%	5.0%	4.0%	5.1%

What benefits are the shopping segments seeking when they travel?

As with other U.S. travellers, the shopping segments also use travel to relieve stress and as a break from their day-to-day activities (see Table 14). But they seem to be keener than the overall travellers in creating lasting memories and in seeing something different. As expected, the gourmet segment is significantly more likely to seek pampering.

Table 14: Benefits Sought During Pleasure or Vacation Trips
% of travellers rating this benefit as "highly important"

	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Relax and relieve stress	70.8%	75.6%	72.6%	73.0%	73.5%	72.7%	70.0%
Get a break from day to day environment	70.5%	75.5%	73.7%	73.1%	74.2%	74.3%	70.0%
Create lasting memories	56.7%	62.1%	60.5%	61.5%	63.0%	61.6%	62.2%
Enrich family relationships	54.2%	58.4%	57.1%	59.8%	59.1%	58.4%	60.2%
Have a life with no fixed schedule	52.4%	56.0%	52.1%	54.0%	53.9%	51.5%	55.1%
Keep family ties alive	45.5%	46.7%	46.0%	46.0%	43.1%	44.3%	47.2%
See or do something new and different	42.5%	46.5%	49.0%	50.6%	53.4%	51.1%	51.4%
Enrich perspective on life	23.2%	26.0%	30.1%	30.5%	35.8%	30.4%	34.2%
Gain knowledge of history, other cultures or other places	19.7%	20.9%	26.7%	29.1%	30.8%	27.5%	31.3%
Stimulate mind/be intellectually challenged	18.6%	20.0%	24.6%	24.5%	28.5%	23.3%	28.7%
Renew personal connections with people (other than family)	18.6%	19.9%	21.4%	20.8%	21.7%	19.6%	23.0%
Be pampered	15.3%	18.4%	15.8%	16.4%	20.0%	15.4%	17.9%
Have stories to share/have something interesting to talk about	12.7%	14.4%	13.8%	14.5%	15.7%	13.2%	16.0%
Be challenged physically/feel physically energized	11.6%	12.4%	13.2%	13.5%	14.7%	11.9%	16.3%
Seek solitude and isolation	12.3%	12.2%	12.8%	14.1%	13.4%	12.2%	14.4%

Is Ontario appealing as a pleasure destination to shoppers?

All of the shopping segments have a better opinion of Ontario than the overall U.S. traveller population, with the gourmet and garden segments having the highest rating of the province. This fact could either explain their higher incidence of visiting Ontario or could be a consequence of them having visited Ontario.

Table 15: Appeal of Ontario as a pleasure destination

Appeal of Ontario	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Very appealing (scores of 8 to 10)	25%	27%	30%	30%	34%	30%	32%
Scores of 5 to 7	33%	34%	35%	35%	34%	36%	35%
Very unappealing (scores of 1 to 4)	18%	17%	15%	16%	13%	15%	16%
Cant' Rate	22%	21%	19%	19%	18%	19%	17%

Table 16: Appeal of Ontario as a pleasure destination

"How you feel about taking a pleasure trip to Ontario?"	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Many Good Reasons to Go There	20%	22%	25%	24%	29%	25%	27%
Some Good Reasons to Go There	51%	52%	53%	52%	51%	54%	52%
No Good Reasons to Go There	29%	26%	23%	23%	20%	21%	21%

Where do the members of the shopping segments live?

Table 17 shows, for selected U.S. states, the share of total U.S. travellers and an index that is calculated by dividing the share of a state's incidence of shoppers by this state's share of total U.S. travellers. If the Index is greater than 1 it means that the shopping segment is over-represented in this state and vice-a-versa if the Index is less than 1. For example, this index shows that for the clothing segment, the percent of Alaska residents who engage in this type of shopping when travelling is 22% greater than Alaska's share of total U.S. travellers.

Table 17: Place of Residence
States with an incidence of shoppers greater than their share of U.S. travellers

	Share of total travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
		Overrepresentation Index					
Alaska	0%	1.22	**1.68**	1.28	**1.57**	**1.44**	**1.91**
California	13%	0.99	1.09	1.03	1.19	1.07	0.95
Colorado	2%	0.93	0.97	0.83	0.90	1.14	0.89
Connecticut	1%	1.02	1.24	0.99	1.37	1.20	1.45
Delaware	0%	1.09	1.19	1.12	1.51	1.29	0.88
District Of Columbia	0%	1.06	1.39	0.98	0.98	0.84	0.52
Georgia	3%	0.99	0.99	1.17	1.11	1.03	0.97
Iowa	1%	1.00	0.95	0.93	0.73	0.90	1.17
Kentucky	1%	1.13	1.01	0.95	0.81	0.83	1.18
Maine	0%	0.94	1.13	0.55	0.54	0.91	0.84
Massachusetts	2%	1.10	1.16	1.02	1.35	1.29	1.69
Mississippi	1%	1.04	1.19	1.07	0.99	0.98	0.99
Montana	0%	0.91	1.18	1.15	0.71	0.99	0.93
Nebraska	1%	1.14	0.97	1.30	1.04	0.95	1.07
Nevada	1%	0.86	0.96	1.03	1.12	0.81	0.93
New Hampshire	1%	1.02	1.25	1.00	1.18	0.95	1.04
New Jersey	3%	1.05	1.05	1.14	1.23	1.15	1.08
New Mexico	1%	1.01	1.11	0.79	0.90	0.90	1.27
New York	6%	1.08	1.01	0.98	1.13	0.98	0.95
North Carolina	3%	1.04	0.99	0.93	0.99	0.97	1.15
North Dakota	0%	1.07	1.06	1.05	0.59	0.73	1.37
Ohio	4%	0.94	0.93	0.98	0.92	1.08	1.17
Oklahoma	1%	0.90	0.87	1.20	0.69	0.98	1.04
Pennsylvania	4%	1.00	0.90	0.90	1.05	1.00	1.10
Rhode Island	0%	1.20	1.03	**1.32**	1.43	1.20	0.83
South Dakota	0%	1.02	0.91	1.08	0.69	0.82	1.23
Tennessee	2%	1.06	0.97	1.16	0.74	0.89	0.89
Vermont	0%	1.04	1.17	0.75	0.92	0.91	0.76
Virginia	3%	1.13	1.13	0.96	1.14	1.03	1.07
Washington	2%	0.98	1.10	1.09	1.18	1.12	1.11
West Virginia	1%	**1.23**	0.93	0.98	1.15	0.99	0.66
Wyoming	0%	1.05	1.34	0.66	0.67	0.89	1.05

Alaska has the highest index in four out of the six shopping segments – a fact that could be explained by Alaska's remoteness. Alaska, Massachusetts and New Jersey are the only three states where all shopping segments are overrepresented. This reinforces the statement made earlier that promotional material targeting Massachusetts or New Jersey should also include shopping opportunities.

THE ONTARIO MARKET

How large is this market?

70% of Ontario travellers, or 5.7 million, engaged in some of the shopping activities included in the TAMS questionnaire while on a trip. Only 3.3% of Ontarians (or 4.8% of those who participated in any shopping) engaged in all of these shopping activities.

Table 1: Ontario travellers engaging in shopping while on a trip
By type of shopping activity

	Activity: Shopping or Browsing					
	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Number of travellers engaging in activity (000s)	4,436	3,239	1,875	2,861	1,354	1,278
As percent of total travellers	**55%**	**40%**	**23%**	**17%**	**35%**	**16%**
Other shopping activities participated in:						
Clothing, shoes & jewelry stores	100%	79%	76%	77%	88%	80%
Books or music stores	58%	100%	70%	64%	74%	71%
Antiques	32%	40%	100%	45%	49%	55%
Gourmet foods in retail stores	27%	31%	36%	32%	100%	38%
Local arts & crafts studios or exhibitions	50%	57%	69%	100%	67%	68%
Greenhouse or garden centre	23%	28%	38%	30%	36%	100%

Shopping or browsing for clothing, shoes and jewellery stores is the most popular shopping activity, accounting for 55% of all Ontario travellers. As well, the majority of travellers who engage in any form of shopping also engage in shopping for clothes, shoes and jewellery. The same is also true for shopping for books and music and for local arts and crafts.

How important is shopping to travellers?

Although shopping is an important activity for a large number of Ontario travellers while at the destination, it is not usually an activity that motivates their trips.

For example, as Table 2 shows, 13% of those who participated in shopping for clothing, shoes and jewellery indicated that shopping for these items was the main purpose for taking at least one of their trips. Meanwhile, still looking at those in the clothing shopping segment, 4% indicated that shopping for books or music was the main purpose for taking some of these trips, 3% indicated that shopping for antiques motivated some of their trips and 2% indicated that shopping for gourmet foods at retail shops motivated some of these trips.

Table 2: Percent of Ontario travellers for whom a shopping activity was the main purpose of taking some of the trips in which this shopping activity occurred

	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Number who participated in activity (000's)	4,436	3,239	1,875	2,861	1,354	1,278
Percent that indicated the activity below was the main purpose for taking some of these trips						
Books or music stores	4%	8%	5%	6%	5%	8%
Antiques	3%	4%	10%	4%	5%	9%
Gourmet foods in retail stores	2%	2%	2%	8%	2%	4%
Local arts & crafts	4%	5%	7%	5%	9%	8%
Clothing, shoes, jewellery	13%	9%	9%	11%	7%	12%
Greenhouse or garden centre	3%	3%	5%	5%	4%	14%

The TAMS data also showed the importance of shopping at the trip-planning stage. Respondents were asked to rate various conditions that they considered when choosing a destination for a pleasure trip. Among the conditions that respondents had to rate was "great shopping opportunities".

Table 3: Importance of shopping opportunities when choosing a destination

Scale	All travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Highly important	15%	19%	16%	16%	20%	14%	16%
Somewhat important	44%	48%	46%	49%	45%	46%	47%
Of no importance	38%	31%	36%	33%	33%	39%	35%

Overall, 15% of Ontario travellers rated "great shopping opportunities" as a highly important condition when choosing a pleasure destination, while the shopping segments varied from a low of 14% for those who shop for local arts and crafts to a high of 20% for those who shop for gourmet foods.

In summary, though shopping is not frequently a trip-motivator even for those who engage in shopping, it remains an important activity that many travellers expect to engage in while travelling. As such, it is not only the actual shopping opportunities that a destination offers, but also the perception of a destination's shopping opportunities that is important to travellers. Therefore, shopping opportunities should be somewhat featured in communications material.

Are there any other activities that act as trip-motivators for these shopping segments?

The top 10 trip-motivating activities for each of the shopping segments are listed in Table 4. For all of the shopping segments, single activities do not in general act as trip-motivators. Sunbathing or going to a beach is the top trip-motivating activity for all the shopping segments.

Table 4: Top 10 other activities acting as main reasons for taking any of the trips that contained the shopping activities

Activity	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Sunbathing/Sitting on a beach	21%	20%	21%	23%	21%	22%
Swimming in lakes	11%	12%	12%	13%	12%	15%
Downhill skiing	10%	11%			11%	
Visiting a national/provincial nature park	12%	14%	16%	15%	16%	17%
Attending live theatre	10%	11%	12%	11%	11%	14%
Attending farmers' market/country fairs						14%
Going to an amusement park	12%	12%	12%	10%	13%	
Strolling around a city to see its architecture	11%	15%	16%	14%	15%	16%
Visiting well-known historic site/buildings	9%	10%	12%	11%	13%	
Visiting well-known natural wonders		10%	13%	12%	12%	13%
Shopping for antiques			10%			
Shopping at garden centres						14%
Going to a lakeside/riverside resort						13%
Going to a seaside resort	9%			11%		
Going to a public campground	11%	13%	12%	11%	12%	13%

What else do the shopping segments like to do when travelling?

Table 5 shows the activities where at least one-third of the members of each shopping segment participated in while on a trip. As was the case with U.S. travellers, the clothing segment participated in fewer activities while on a trip. In fact, this segment appears to primarily want to engage in shopping, dining at restaurants that offer local cuisine, visit local cafes and stroll around a city to observe its buildings and architecture (perhaps another form of window shopping?).

Table 5: Activities engaged in by at least one third of the shopping segments while travelling

Activity	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Sunbathing/Sitting on a beach	49%	49%	51%	51%	55%	50%
Swimming in lakes	45%	49%	50%	49%	51%	52%
Swimming in oceans	33%	33%	34%	37%	37%	30%
Hiking as a same day excursion				33%	33%	
Visiting nature park-national/provincial		38%	39%	41%	39%	41%
Attending live theatre				33%		37%
Going to a farmers' markets/country fair		33%	42%	39%	38%	47%
Visiting art galleries		34%	35%	41%	35%	35%
Visiting a history/heritage museum		35%	39%	40%	38%	36%
Strolling around a city to see its architecture	54%	62%	63%	71%	64%	59%
Visiting well-known historic sites/buildings	40%	47%	50%	55%	49%	46%
Visiting other historic sites/buildings	33%	38%	43%	46%	40%	39%
Visiting well-known natural wonders		37%	41%	43%	42%	42%
Going to a casino	37%	35%	36%	39%	34%	41%
Going to the movies / cinema	38%	45%	40%	45%	39%	48%
Dining at restaurants with local recipes & ingredients	70%	75%	75%	83%	77%	74%
Dining at other high-end restaurants	37%	40%	41%	51%	41%	44%
Shop - Books/Music stores	58%	100%	70%	74%	64%	71%
Shop – Antiques		40%	100%	49%	45%	55%
Shop - Retail Gourmet Foods			36%	100%		38%
Shop - Local Arts & Crafts	50%	57%	69%	67%	100%	68%
Shop - Clothing, Shoes, Jewellery	100%	79%	76%	88%	77%	80%
Shop - Greenhouse/Garden Centre		38%	35%	36%		100%
Going to local outdoor cafes	49%	57%	61%	68%	59%	60%
Wineries - Day visits for tasting				34%		34%
Going to a lakeside/riverside resort			33%	34%		37%

The gourmet food and garden segments are the most active among all the segments, though the difference between the various Ontario shopping segments is not as noticeable as it was with the U.S. shoppers.

From a tourism product development perspective, given that the activities of interest (activities that command participation rates of 50% or more) focus on shopping, eating and strolling around the city, a movement toward vertically integrated neighbourhoods as suggested for the U.S. shoppers would meet with the behaviours and preferences of travellers in these segments and would appeal to shoppers from both markets.

What else do these shopping segments expect from a destination?

All shopping segments expect two conditions to be met at the destination: The destination has to be safe or at least give them the feeling of safety; and the destination has to be free of health concerns (see Table 6).

In addition, all shopping segments expect to find lots of things for adults to do at the destination, they expect convenient access either by car or air and expect a wide variety of accommodations in the mid price range.

Table 6: Expectations of a pleasure destination – % of pleasure travellers

Shopping Segment	What is **highly important** to them about pleasure destinations
Clothing, Shoes & Jewellery *Safety, variety and convenience in getting there*	**Primary importance (incidence of 50%+)** 1. Feeling safe at the destination (77%) 2. No health concerns at the destination (56%) 3. **Secondary importance (incidence of 33%-<50%)**Lots of things for adults to do (43%) 4. Convenient access by car (41%) 5. Availability of mid-range accommodation (36%) 6. Direct access by air (34%)
Books & Music *Safety, variety and convenience in getting there*	**Primary importance (incidence of 50%+)** 1. Feeling safe at the destination (73%) 2. No health concerns at the destination (53%) **Secondary importance (incidence of 33% to <50%)** 3. Lots of things for adults to do (44%) 4. Convenient access by car (39%) 5. Availability of mid-range accommodation (35%)
Antiques *Safety, variety and convenience in getting there*	**Primary importance (incidence of 50%+)** 1. Feeling safe at the destination (74%)2. No health concerns at the destination (54%) **Secondary importance (incidence of 33% to <50%)** 3. Lots of things for adults to do (44%) 4. Convenient access by car (43%) 5. Availability of mid-range accommodation (35%)
Gourmet Foods at Retail Stores *Safety, variety and convenience in getting there*	**Primary importance (incidence of 50%+**1. Feeling safe at the destination (72%2. No health concerns at the destination (52%) **Secondary importance (incidence of 33% to <50%)** 3. Lots of things for adults to do (48%) 4. Convenient access by car (39%) 5. Availability of mid-range accommodation (38%) 6. Direct access by air (37%) 7. Information about the destination on the Internet (33%)
Local Arts & Crafts *Safety, variety and convenience in getting there*	**Primary importance (incidence of 50%+)** 1. Feeling safe at the destination (74%) 2. No health concerns at the destination (55%) **Secondary importance (incidence of 33% to <50%)** 4. Lots of things for adults to do (42%) 5. Convenient access by car (39%) 6. Availability of mid-range accommodation (37%) 7. Direct access by air (34%)
Greenhouse & Garden Centres *Safety, variety and convenience in getting there*	**Primary importance (incidence of 50%+)** 1. Feeling safe at the destination (76%) 2. No health concerns at the destination (56%) **Secondary importance (incidence of 33% to <50%)** 3. Convenient access by car (46%) 4. Lots of things for adults to do (42%) 5. Availability of mid-range accommodation (35%)

In terms of their general attitudes, all of the shopping segments see themselves as having more energy than others their age with the garden segment being again the most likely to believe this statement.

In all shopping segments, the majority waits for the price to come down before making a purchase.

With the exception of the clothing segment, all shopping segments have a higher incidence of wanting to visit undiscovered places than other Ontario travellers. This characteristic does not pertain directly to their desire to shop, but perhaps their motivation is to find undiscovered places, which may provide opportunities for "undiscovered" shopping especially for antiques.

Table 7: General Attitudes – % of total travellers

"The statement below applies very much to me" (score of 4 or 5 out of 5)	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Prefer to visit undiscovered places	29%	27%	33%	36%	33%	33%	32%
Actively involved in rigorous fitness program	24%	26%	29%	26%	33%	28%	23%
Chance has little to do with success in life	35%	35%	38%	40%	40%	38%	41%
More energy than most people my age	35%	35%	37%	40%	40%	38%	41%
Often buy new products before they come down in price	17%	19%	19%	17%	21%	17%	17%
Make decisions quickly and easily	37%	39%	41%	45%	45%	39%	41%
"The statement below applies very little to me" (score of 1 or 2 out of 5)							
Prefer to visit undiscovered places	47%	48%	41%	38%	41%	41%	41%
Actively involved in rigorous fitness program	58%	55%	52%	55%	49%	53%	57%
Chance has little to do with success in life	29%	29%	27%	25%	26%	27%	28%
More energy than most people my age	26%	26%	23%	19%	22%	22%	19%
Often buy new products before they come down in price	60%	55%	56%	59%	53%	57%	57%
Make decisions quickly and easily	28%	26%	24%	22%	21%	23%	24%

What are the demographics of the shopping segments?

Compared to travellers in general, the shopping segments include proportionately more women than men with the books & music segment having the most equal distribution between men and women among the shopping segments.

The antiques and garden segments are significantly older than the other shopping segments and older than the average Ontario traveller.

All shopping segments are better educated than the average Ontario traveller, with the gourmet segment having perhaps the highest education amongst them.

The antiques and garden segments have significantly higher proportions of retired members than other segments or other Ontario travellers. All shopping segments have household incomes higher than the average Ontario traveller, with the gourmet segment having the highest and the garden segment having one of the lowest - which reflects their high retirement ratio.

The majority of travellers in the shopping segments live with a spouse or partner. Travellers in the antiques and garden segments are the most likely to live with their partners. These two segments also have the lowest proportion of families with children less than 18 years of age.

Table 8: Gender and age

Gender	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Males	49%	42%	45%	42%	42%	42%	42%
Females	51%	58%	55%	58%	58%	58%	58%
Age							
18-24	13%	13%	15%	8%	9%	10%	6%
25-34	18%	20%	20%	16%	19%	18%	13%
35-44	21%	22%	21%	22%	22%	21%	19%
45-54	20%	21%	19%	22%	22%	23%	23%
55-64	14%	14%	14%	18%	15%	17%	19%
65 and over	14%	11%	11%	13%	12%	12%	19%

Table 9: Education

Education – Highest level attained	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Less than high school	9%	7%	5%	7%	5%	5%	8%
High school diploma	26%	24%	22%	23%	19%	21%	26%
Some post-secondary	12%	12%	13%	12%	11%	12%	12%
Post-secondary	21%	22%	21%	22%	20%	20%	23%
University degree	32%	35%	40%	36%	46%	41%	32%

Table 10: Employment Status

Employment status	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Work 30+ hours per week as paid worker	48%	50%	47%	46%	44%	48%	40%
Self-employed/unpaid worker	10%	10%	11%	10%	13%	11%	11%
Part-time paid worker	6%	5%	6%	7%	6%	6%	6%
Going to school	8%	9%	10%	5%	8%	7%	4%
Homemaker	5%	5%	5%	6%	5%	5%	5%
Retired	17%	15%	15%	19%	17%	17%	25%
Other	7%	6%	6%	6%	7%	6%	7%

Table 11: Household Income

Household Income	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Under $20,000	5%	5%	5%	4%	5%	3%	4%
$20,000 to $39,999	13%	10%	10%	10%	10%	9%	11%
$40,000 to $59,999	18%	17%	17%	18%	15%	17%	19%
$60,000 to $79,999	16%	16%	16%	17%	17%	17%	17%
$80,000 to $99,999	15%	15%	15%	15%	14%	16%	15%
$100,000 or more	32%	37%	36%	37%	40%	38%	34%
Average	86,178	92,226	91,507	92,801	95,354	95,056	89,582

Table 12: Household Composition							
"Who do you live with?"	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Alone	10%	10%	10%	10%	10%	11%	11%
With spouse and no children less than 17 years	34%	34%	35%	41%	37%	38%	41%
With spouse and children less than 17 years	25%	26%	25%	24%	24%	25%	21%
With spouse, children 18 or more and no children less than 17	9%	10%	8%	10%	10%	9%	13%
With children and no spouse	6%	5%	5%	4%	5%	5%	5%
With someone other than spouse/child	15%	15%	17%	10%	13%	12%	8%

Is there a relationship between participation in shopping and demographic variables?

Figure 1 shows how the participation in specific shopping activities varies with age. The pattern is quite different than that observed earlier with respect to the U.S. shopping segments.

The incidence of shopping for clothes, shoes and jewellery fluctuates between 55% and 59% with no apparent trend. The incidence of shopping for books and music increases initially with age (up to 25-34 years) and then it declines, while shopping for antiques, arts & crafts, gourmet foods and at garden centres declines initially with age and then it increases at a constant rate.

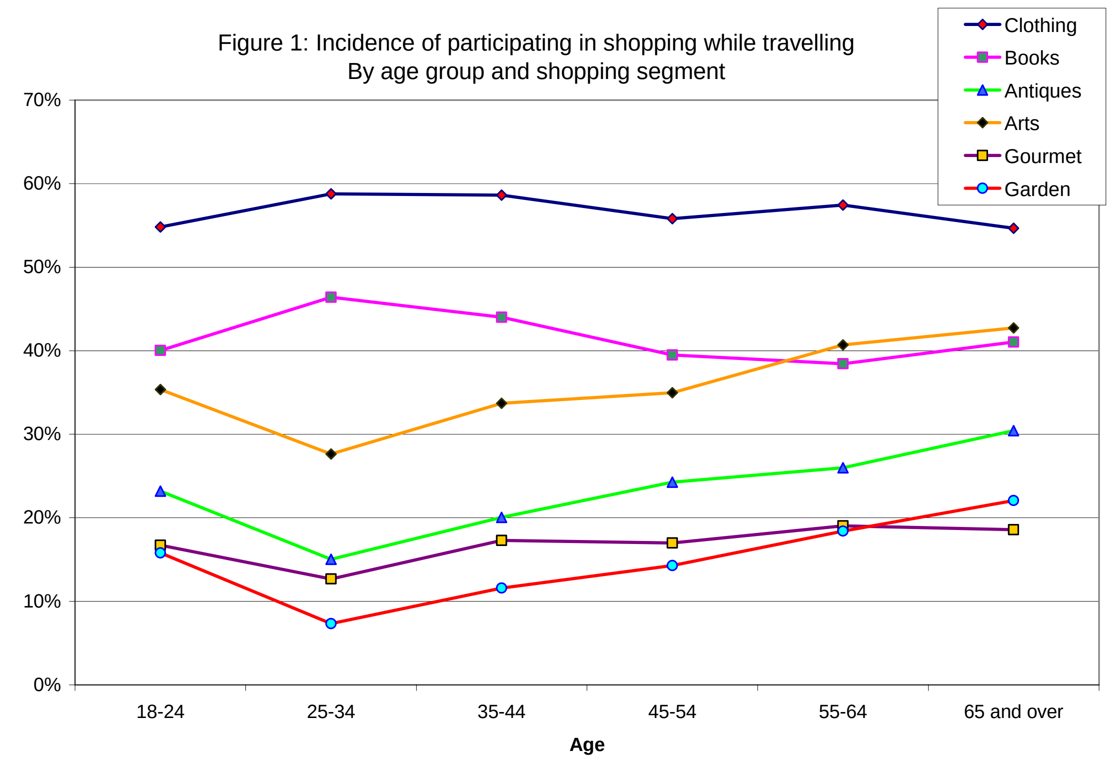
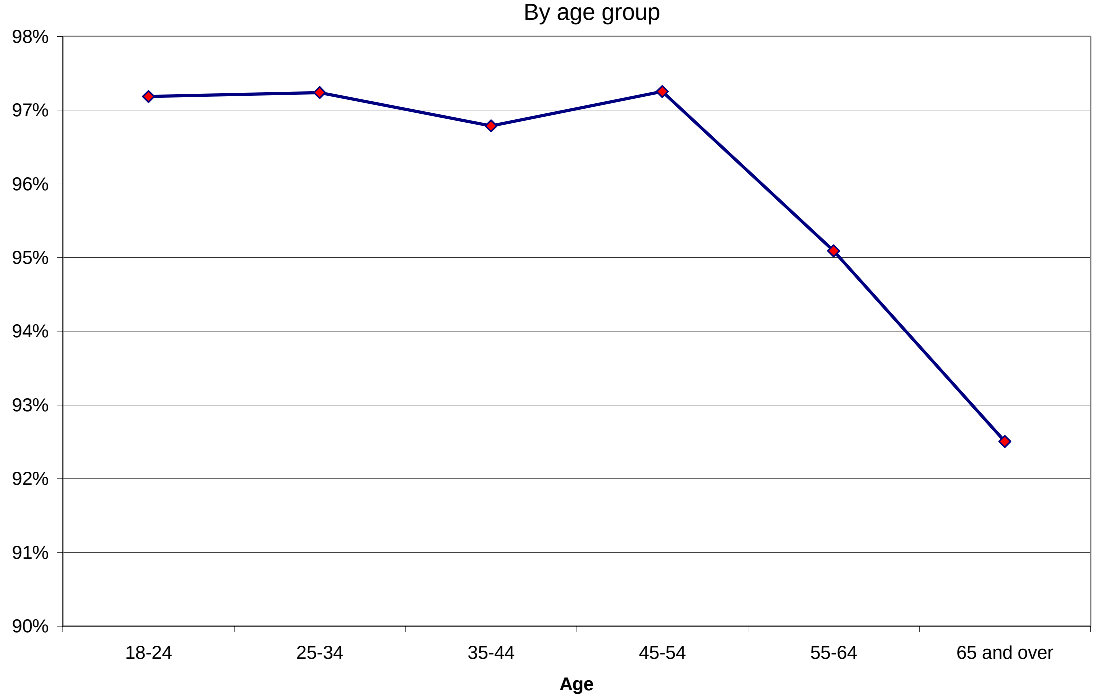


Figure 2 shows how participation in any activity while on a trip varies with age. As with the U.S. travellers, participation in activities declines with age. However, there is a significant difference between U.S. and Ontario travellers. While the U.S. participation rate begins to decline sharply at 60, with Ontarians it begins to decline sharply somewhere between 45 and 54.

Figure 2: Incidence of participation in any activity while travelling
By age group



What are the travel patterns of the various shopping segments?

The gourmet segment, having the highest household income among the shopping segments, is the most likely to travel to United States, Asia and Europe. This shopping segment also has the highest incidence of visiting Quebec – a result not unexpected given Quebec's reputation in the area of shopping as well as food – from eating at restaurants to shopping for food at small niche farms.

Travellers from the shopping segments are more likely to travel to outside of Ontario than other Ontario travellers, a fact that reflects to some extent their higher incomes.

Table 13: Places visited for trips of one or more nights

	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Prince Edward Island	6%	6%	8%	9%	7%	8%	8%
Nova Scotia	10%	11%	13%	15%	15%	14%	13%
Quebec	34%	38%	41%	39%	47%	41%	36%
Ontario	84%	86%	88%	88%	88%	89%	90%
Alberta	12%	14%	16%	16%	19%	16%	16%
British Columbia	14%	17%	20%	18%	24%	20%	20%
United States	57%	65%	64%	65%	68%	65%	63%
Mexico	12%	14%	13%	14%	16%	17%	13%
South / Central America	5%	6%	5%	6%	6%	8%	5%
The Caribbean	20%	22%	20%	21%	24%	24%	22%
Europe (Incl. UK & Russia)	18%	21%	24%	25%	31%	24%	23%
Asia	6%	7%	7%	7%	9%	7%	7%
Australia/New Zealand/Africa	3%	3%	4%	4%	3%	4%	4%

What benefits are the shopping segments seeking when they travel?

As with other Ontario travellers, shoppers also travel to relieve stress and to have a break from the day-to-day activities. Interestingly, they are also interested in travelling to satisfy their intellectual curiosity. For example, the gourmet segment indicates that they travel to gain "Gain knowledge of history…", "Enrich perspective in life" and "Stimulate the mind". This trend is markedly different from other Ontario travellers.

Table 14: Benefits sought during pleasure or vacation trips
% of travellers rating this benefit as "highly important"

	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Get a break from day to day environment	68%	73%	71%	68%	71%	71%	65%
Relax and relieve stress	66%	71%	69%	70%	72%	69%	66%
Create lasting memories	52%	56%	56%	55%	56%	57%	53%
Enrich relationship with spouse/children	53%	55%	55%	57%	58%	57%	58%
See or do something new and different	44%	47%	50%	49%	53%	51%	46%
Have a life with no fixed schedule	45%	47%	46%	48%	46%	47%	44%
Keep family ties alive	44%	45%	45%	44%	45%	43%	48%
Enrich perspective on life	28%	29%	34%	34%	38%	32%	29%
Gain knowledge of history, other cultures or other places	25%	27%	33%	35%	35%	33%	31%
Stimulate mind/be intellectually challenged	20%	21%	25%	27%	29%	24%	24%
Renew personal connections with people (other than family)	19%	20%	22%	21%	22%	19%	24%
Be pampered	14%	17%	13%	14%	18%	14%	14%
Be challenged physically/feel physically energized	16%	16%	17%	18%	20%	16%	17%
Have stories to share/have something interesting to talk about	12%	13%	13%	13%	13%	11%	13%
Seek solitude and isolation	11%	11%	12%	13%	13%	11%	12%

Is Ontario appealing as a pleasure destination to shoppers?

Five of the shopping segments have a marginally better opinion of Ontario than the overall traveller population while the garden segment has a significantly higher incidence of not only rating the province as very appealing but believed that there are a lot of good reasons to visit it.

Table 15: Appeal of Ontario as a pleasure destination

Appeal of Ontario	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Very appealing (scores of 8-10)	69%	69%	68%	71%	70%	72%	76%
Scores of 5 to 7	26%	26%	27%	26%	26%	24%	21%
Very unappealing (scores of 1-4)	3%	3%	3%	3%	3%	3%	3%
Can't Rate	1%	1%	2%	1%	1%	1%	1%

Table 16: Appeal of Ontario as a pleasure destination

"How you feel about taking a pleasure trip to Ontario?"	All Travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
Many good reasons to go there	65%	67%	68%	70%	69%	70%	74%
Some good reasons to go there	33%	31%	31%	29%	30%	29%	26%
No good reasons to go there	2%	2%	1%	1%	1%	1%	1%

Where does the shopping segment live?

Table 17 shows, for selected Ontario cities, their share of total Ontario travellers and an index that is calculated by dividing the share of a city's incidence of shoppers by this city's share of total Ontario travellers. For example, the index shows that for the clothing segment the percent of Ottawa residents who engage in this type of shopping when travelling is 8% higher than Ottawa's share of total Ontario travellers.

Table 17: Place of Residence
Census Metropolitan Areas

Place of Residence	Share of total travellers	Clothing segment	Books & Music segment	Antiques segment	Gourmet foods segment	Arts & Crafts segment	Garden Centre segment
		Overrepresentation Index					
Ottawa	7%	1.08	1.17	0.99	**1.21**	**1.26**	0.70
Kingston	1%	1.01	1.23	0.86	0.99	1.18	1.52
Oshawa	3%	1.00	1.02	1.10	0.90	0.81	1.14
Toronto	43%	0.97	0.97	0.95	1.17	1.01	0.84
Hamilton	6%	1.05	1.03	1.01	1.06	1.09	1.01
St. Catharines-Niagara	3%	0.88	0.70	0.73	0.52	0.81	0.98
Kitchener	4%	1.06	0.94	1.00	1.08	0.93	1.19
London	4%	1.05	0.95	0.89	0.98	1.01	0.99
Windsor	3%	1.22	**1.35**	1.43	1.01	1.28	1.80
Greater Sudbury	1%	1.00	0.89	0.94	0.73	0.72	0.89
Thunder Bay	1%	**1.26**	1.09	**1.51**	0.97	1.12	**1.82**
Other Ontario	25%	0.97	1.00	1.07	0.71	0.92	1.19

Toronto has the lion's share of Ontario travellers, but only the gourmet segment is overrepresented there. Thunder Bay has the highest index in three out of the six shopping segments, a result perhaps explained by Thunder Bay's remoteness. Ottawa has the highest index in two of the six shopping categories: gourmet foods and arts and crafts.