

**U.S. TRAVEL MARKET**

# **U.S. Travelers to Manitoba**

*A Profile Report*

**January 30, 2008**

**Prepared by Lang Research Inc. on behalf of:**

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







## U.S. Travelers to Manitoba

### Market Incidence

Over the last two years, 0.4% of adult Americans (895,113) took an overnight pleasure trip to Manitoba. This represents 0.4% of U.S. Pleasure Travelers. Of those who took a trip to Manitoba, 32.1% took two or more pleasure trips in the last two years.

Fig. 1 Incidence of Trips<sup>1</sup> to Manitoba During the Past Two Years

	Manitoba
Number of Americans Taking a Trip <sup>2</sup>	895,113
Percent of U.S. Pleasure Travelers <sup>3</sup>	0.5%
Percent of U.S. Population <sup>4</sup>	0.4%
Percent of Manitoba Visitors Taking Two or More Pleasure Trips to Manitoba <sup>5</sup>	32.1%

- 1 - "Trips" are defined as out-of-town trips for any purpose involving an overnight stay of one or more nights. Trips NOT involving overnight stays are NOT examined in this report.
- 2 - Defined as individuals who took at least one overnight trip to Manitoba in the last two years for any purpose.
- 3 - "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 row reports the percent of U.S. Pleasure Travelers who took a trip to Manitoba.
- 4 - This row reports the percent of the Total U.S. Adult Market who took a trip to Manitoba during the past two years.
- 5 - This row reports the percent of U.S. Pleasure Travelers who visited Manitoba who took two or more pleasure trips to Manitoba during the last two years.

### Incidence by Region, State and Population Size

Relative to the average U.S. Pleasure Traveler, those who took a trip to Manitoba are over-represented among those living in the East North Central and West North Central regions. They are also more likely to live in small towns and rural areas (population less than 100,000) than in mid-sized and larger communities.

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

	Total Population	Estimated Number Who Took a Trip to Manitoba	Percent of Pleasure Travelers in Region Who Took a Trip to Manitoba	Percent of Total Regional Population Who Took a Trip to Manitoba
United States	222,846,268	895,113	0.5%	0.4%
New England	11,095,629	23,635	0.3%	0.2%
Middle Atlantic	31,005,526	52,337	0.2%	0.2%
East North Central	34,621,254	188,229	0.7%	0.5%
West North Central	15,024,360	295,495	2.5%	2.0%
South Atlantic	42,602,998	77,040	0.2%	0.2%
East South Central	13,597,436	41,814	0.4%	0.3%
West South Central	24,853,901	62,333	0.3%	0.3%
Mountain	15,030,720	49,286	0.4%	0.3%
Pacific	34,529,689	93,248	0.3%	0.3%
Alaska	484,754	11,695	2.8%	2.4%
Not Available	745,757	11,695	1.9%	1.6%
Less than 100,000	29,429,442	235,575	1.1%	0.8%
100,000 to 499,999	36,551,501	130,935	0.5%	0.4%
500,000 to 1,999,999	52,335,815	184,346	0.5%	0.4%
2,000,000 or more	103,783,753	332,562	0.4%	0.3%

Those who visited Manitoba are much more likely to live in neighbouring North Dakota than elsewhere in the United States. There is also an above-average rate of visits among the residents of Minnesota. As would be expected, the likelihood of a visit to Manitoba declines as the distance of the state from Manitoba increases (see Fig. 3 on next page).

Fig. 3 Those Who Took a Trip to Manitoba by U.S. State

Region	State	Population of State	Estimated Number Taking Trip to Manitoba	Percent of Pleasure Travelers in State	Percent of State Population
United States	All States	222,846,268	895,113	0.5%	0.4%
New England	Connecticut	2,685,692	6,242	0.3%	0.2%
	Maine	1,047,770	8,238	1.1%	0.8%
	Massachusetts	4,423,562	5,510	0.2%	0.1%
	New Hampshire	1,604,344	1,759	0.1%	0.1%
	Rhode Island	837,445	0	0.0%	0.0%
	Vermont	496,816	1,886	0.5%	0.4%
Middle Atlantic	New Jersey	6,708,501	11,234	0.2%	0.2%
	New York	14,727,054	20,309	0.2%	0.1%
	Pennsylvania	9,569,972	20,795	0.3%	0.2%
East North Central	Illinois	9,521,097	38,140	0.5%	0.4%
	Indiana	4,717,624	20,462	0.6%	0.4%
	Michigan	7,709,890	47,104	0.8%	0.6%
	Ohio	8,412,962	20,442	0.3%	0.2%
	Wisconsin	4,259,682	62,081	1.8%	1.5%
West North Central	Iowa	2,262,393	5,537	0.3%	0.2%
	Kansas	2,304,474	16,394	0.9%	0.7%
	Minnesota	3,946,220	167,407	5.0%	4.2%
	Missouri	4,138,758	18,545	0.6%	0.4%
	Nebraska	1,304,361	17,874	1.7%	1.4%
	North Dakota	488,140	67,324	16.4%	13.8%
	South Dakota	580,015	2,414	0.5%	0.4%
South Atlantic	Delaware	646,427	8,857	1.8%	1.4%
	District of Columbia	521,285	0	0.0%	0.0%
	Florida	13,937,467	20,602	0.2%	0.1%
	Georgia	6,668,302	14,834	0.3%	0.2%
	Maryland	3,428,206	9,709	0.4%	0.3%
	North Carolina	6,651,453	7,186	0.1%	0.1%
	South Carolina	3,241,944	0	0.0%	0.0%
	Virginia	5,957,159	15,852	0.3%	0.3%
	West Virginia	1,550,755	0	0.0%	0.0%
East South Central	Alabama	3,431,591	5,338	0.2%	0.2%
	Kentucky	3,447,277	12,203	0.5%	0.4%
	Mississippi	2,156,793	0	0.0%	0.0%
	Tennessee	4,561,775	24,272	0.7%	0.5%
West South Central	Arkansas	2,103,346	0	0.0%	0.0%
	Louisiana	3,367,908	21,849	1.0%	0.6%
	Oklahoma	2,643,565	10,233	0.5%	0.4%
	Texas	16,739,082	30,251	0.2%	0.2%
Mountain	Arizona	4,451,660	20,027	0.6%	0.4%
	Colorado	3,501,822	15,170	0.5%	0.4%
	Idaho	1,044,920	0	0.0%	0.0%
	Montana	726,027	7,718	1.3%	1.1%
	Nevada	1,809,582	0	0.0%	0.0%
	New Mexico	1,433,596	0	0.0%	0.0%
	Utah	1,671,322	3,452	0.2%	0.2%
Wyoming	391,790	2,919	0.9%	0.7%	
Pacific	Alaska	484,754	11,695	2.8%	2.4%
	California	26,965,837	68,921	0.3%	0.3%
	Oregon	2,793,303	4,564	0.2%	0.2%
	Washington	4,770,549	19,763	0.5%	0.4%

## Demographic Profile

U.S. Pleasure Travelers who visited Manitoba are more often male and over-represented among those 55 and older (59.7% 55 years of age or older). Consistent with this fact, they are less likely to have dependent children living at home (80.3%).

However, they are more likely to have a post-graduate degree (28.2%) and an above-average household income. As such, visitors to Manitoba are over-represented among affluent, mature couples: one of the most sought after travel sectors in the marketplace.

Fig. 4 Demographic Profile of Visitors to Manitoba Relative to All U.S. Pleasure Travelers

Attribute	Size of Market	Took a Trip to Manitoba	Did Not Take a Trip to Manitoba <sup>1</sup>	Pleasure Travelers	Index <sup>2</sup>
		895,113	169,615,128	170,510,241	100
Gender	Male	54.3%	48.5%	48.5%	112
	Female	45.7%	51.5%	51.5%	89
Age of Respondent	18 to 24	3.9%	10.9%	10.8%	36
	25 to 34	16.0%	21.0%	21.0%	76
	35 to 44	14.0%	17.3%	17.3%	81
	45 to 54	16.4%	21.1%	21.0%	78
	55 to 64	20.8%	15.4%	15.5%	134
	65 Plus	28.9%	14.3%	14.4%	200
Average Age		52.6	45.4	45.4	N/A
Marital Status	Not married	26.7%	30.6%	30.5%	88
	Married	73.3%	69.4%	69.5%	105
Parental Status	No children under 18	80.3%	70.0%	70.0%	115
	Children under 18	19.7%	30.0%	30.0%	66
Education	High school or less	17.0%	20.5%	20.5%	83
	Trade, Technical, Community Col.	17.8%	21.4%	21.4%	84
	University Degree	36.9%	41.1%	41.1%	90
	Post Graduate Degree	28.2%	17.0%	17.1%	165
Household Income	Under \$20,000	5.4%	8.1%	8.1%	67
	\$20,000 to \$39,999	12.4%	16.3%	16.2%	76
	\$40,000 to \$59,999	15.1%	16.7%	16.7%	90
	\$60,000 to \$79,999	17.0%	14.7%	14.7%	115
	\$80,000 to \$99,999	18.1%	11.6%	11.6%	157
	\$100,000 to \$149,999	13.1%	14.4%	14.4%	91
	\$150,000 or more	10.2%	6.7%	6.7%	153
	Not stated	8.7%	11.7%	11.7%	75
Average Household Income		\$85,127	\$74,244	\$74,303	N/A

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

### Travel Activity (During Last Two Years)

Those who visited Manitoba during the last two years are frequent travelers with 65.4% taking five or more pleasure trips in the last two years. (Note: 42.4% of U.S. Pleasure Travelers took five or more pleasure trips in the last two years). As such, they were more likely than the average U.S. Pleasure Traveler to have taken trips within their home state, to have traveled to other parts of the United States and to have traveled to Mexico, the Caribbean and overseas destinations.

Americans who visited Manitoba were also more likely to have traveled to other parts of Canada with the majority having also visited Ontario (54.3%). Relative to the average U.S. Pleasure Traveler, they were especially likely to have also visited Saskatchewan, Alberta, the Northern Territories and the Atlantic Region during the last two years.

Fig. 5 Percent Traveling to Canada and Other Destinations during Past Two Years

	Took a Trip to Manitoba	Did Not Take a Trip to Manitoba	Pleasure Travelers	Index
Size of Market	895,113	169,615,128	170,510,241	100
All destinations	100.0%	85.3%	85.4%	117
Canada	100.0%	14.1%	14.6%	687
Newfoundland & Labrador	11.3%	0.4%	0.4%	2717
Prince Edward Island	12.3%	0.5%	0.6%	2012
New Brunswick	16.4%	0.7%	0.8%	2021
Nova Scotia	15.1%	1.3%	1.3%	1125
Quebec	23.8%	3.0%	3.1%	767
Ontario	54.3%	8.0%	8.3%	657
Manitoba	100.0%	0.0%	0.5%	19015
Saskatchewan	40.7%	0.3%	0.5%	8415
Alberta	40.5%	1.0%	1.2%	3375
British Columbia	36.8%	4.0%	4.1%	892
Yukon	17.1%	0.5%	0.6%	3006
Northwest Territories	14.6%	0.3%	0.4%	3686
Nunavut	4.2%	LT 0.1%	LT 0.1%	8957
Own State	86.6%	79.7%	79.7%	109
Other parts of the U.S.	96.3%	90.6%	90.6%	106
Mexico	22.8%	13.5%	13.6%	168
Caribbean	27.1%	12.7%	12.7%	213
All other destinations	19.1%	9.5%	9.6%	200

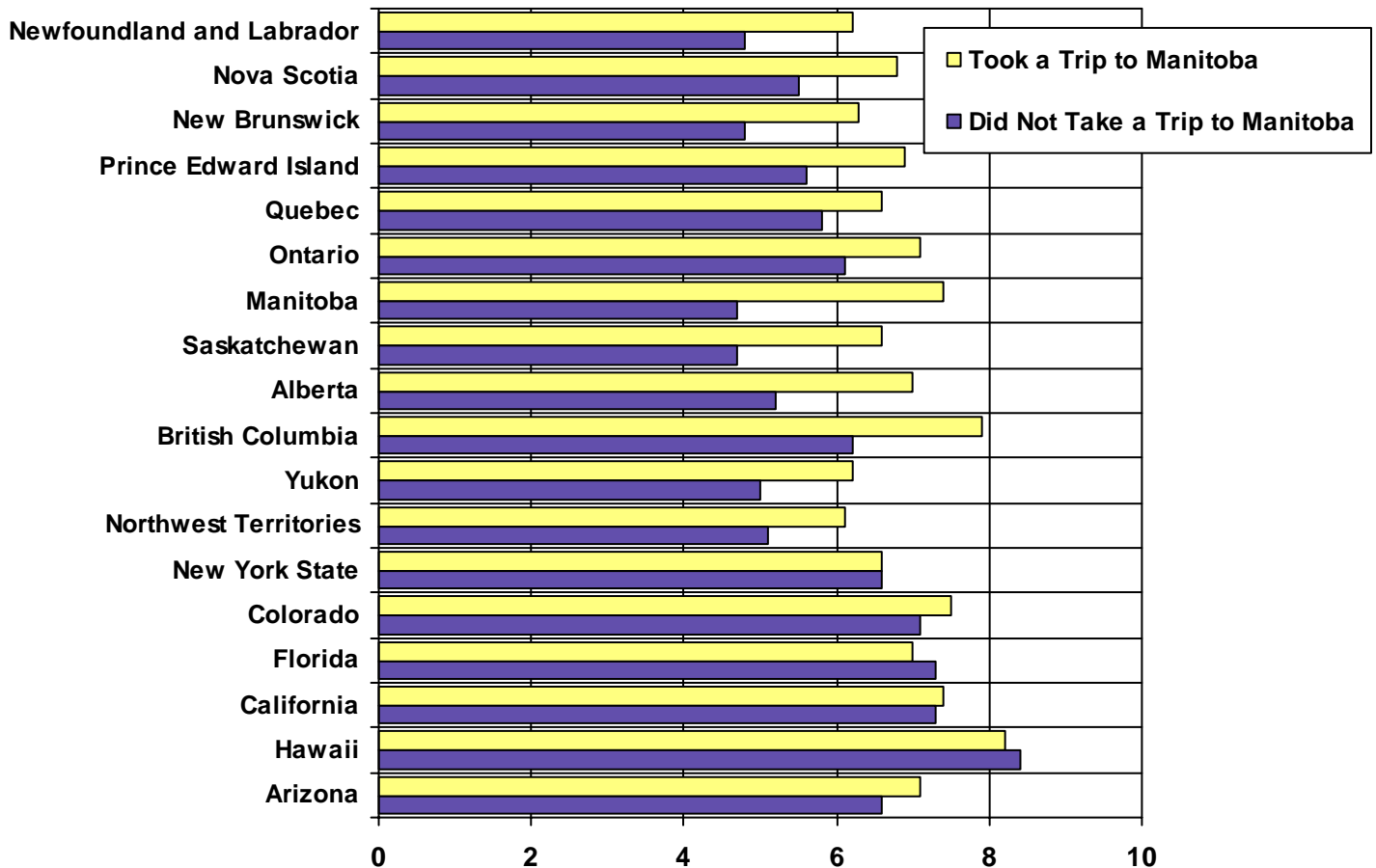
**Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories**

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.

Those who visited Manitoba have a much more favourable impression of all Canadian destinations than the average U.S. Pleasure Traveler does. British Columbia (7.9) received the highest rating among Canadian destinations followed by Ontario (7.4), Quebec (7.1) and Alberta (7.0).

On the other hand, with the exception of a more favourable impression of Colorado and Arizona, the perceived appeal of the other U.S. reference states is comparable to that of other U.S. Pleasure Travelers.

Fig. 6 Overall Appeal Ratings of Provinces, Territories and Selected U.S. States on a 10-Point Appeal Rating Scale (Higher Scores=More Appealing)



### Culture and Entertainment Activities Pursued While on Trips

U.S. Pleasure Travelers who visited Manitoba are much more active than the average U.S. Pleasure Traveler in culture and entertainment pursuits while on trips. They most often went shopping and dining, visited historical sites, museums and art galleries as well as casinos, live theatre and comedy clubs while on trips. Relative to the average U.S. Pleasure Traveler, they were much more likely to have taken part in participatory, educational activities (e.g., aboriginal cultural experiences, participatory historical activities, archaeological digs, agro-tourism) and to have attended art performances and attractions (e.g., high art performances; theatre, film and music festivals) while on trips. They were also more likely to have attended sporting events (e.g., equestrian & western events, professional sporting events, national & international sporting events) taken part in a wine, beer or food tasting and to have visited a science and technology exhibit during the last two years. Their cultural pursuits indicate that this travel segment is interested in intellectual stimulation as well as live entertainment.

Fig. 7 Culture and Entertainment Activities Pursued While on Trips  
(See Appendix One for a Definition of Each Type of Culture & Entertainment Activity)

	Took a Trip to Manitoba	Did Not Take a Trip to Manitoba	Pleasure Travelers	Index
Size of Market	895,113	169,615,128	170,510,241	100
Shopping and Dining	84.4%	77.7%	77.7%	109
Historical Sites, Museums & Art Galleries	68.8%	53.4%	53.5%	129
Casino, Theatre and Comedy Clubs	56.4%	45.4%	45.4%	124
Theme Parks & Exhibits	56.0%	48.9%	49.0%	114
Fairs and Festivals	54.0%	40.9%	41.0%	132
Science and Technology Exhibits	43.9%	24.7%	24.8%	177
Fine Dining and Spas	39.3%	32.9%	33.0%	119
Wine, Beer and Food Tastings	35.8%	22.9%	22.9%	156
Equestrian & Western Events	32.6%	15.4%	15.5%	211
Agro-Tourism	28.1%	13.5%	13.5%	208
Garden Theme Attractions	27.7%	13.6%	13.7%	203
Aboriginal Cultural Experiences	26.4%	8.5%	8.6%	308
Professional Sporting Events	25.9%	16.1%	16.1%	161
High Art Performances	23.5%	10.9%	10.9%	214
Rock Concerts and Recreational Dancing	22.6%	15.2%	15.3%	148
Theatre, Film & Musical Festivals	19.3%	8.3%	8.3%	232
Participatory Historical Activities	13.8%	3.9%	3.9%	353
Archaeological Digs & Sites	12.5%	5.5%	5.5%	227
Amateur Tournaments	11.7%	7.7%	7.7%	153
National & International Sporting Events	5.0%	1.8%	1.9%	269

### Culture and Entertainment Activities Pursued While Not on Trips

U.S. Pleasure Travelers who visited Manitoba are also active in many culture and entertainment pursuits while NOT traveling. They frequently dine in local restaurants, attend local festivals or fairs and visit local historic sites or heritage buildings. Relative to the average U.S. Pleasure Traveler, they are also much more likely to attend live art performances (e.g., the opera, ballet, classical music concerts) as well as rodeos. On the other hand, reflecting the age of these travelers, they are less likely to visit an amusement or theme park, go dancing or attend a rock concert.

Fig. 8 Culture and Entertainment Activities Pursued While Not on Trips

	Took a Trip to Manitoba	Did Not Take a Trip to Manitoba	Pleasure Travelers	Index
Size of Market	895,113	169,615,128	170,510,241	100
Going out to eat in restaurants	95.4%	92.8%	92.8%	103
Going to festivals or fairs	71.2%	65.4%	65.5%	109
Going to historic sites or heritage buildings	60.4%	40.0%	40.1%	151
Going to museums	52.5%	37.4%	37.5%	140
Going to amateur sporting events	50.6%	39.8%	39.9%	127
Going to zoos or aquariums	49.8%	45.6%	45.6%	109
Going to live theatre	42.1%	29.1%	29.2%	144
Going to art galleries or art shows	41.2%	27.7%	27.8%	148
Going to professional sporting events	39.0%	34.9%	34.9%	112
Going to pick-your-own farms or farmers' market	37.4%	31.6%	31.6%	118
Going to gamble in casinos	33.5%	28.0%	28.0%	120
Going to botanical gardens	31.9%	19.9%	20.0%	160
Going to amusement or theme parks	30.0%	38.2%	38.1%	79
Going to bars with live pop or rock bands	26.6%	23.5%	23.6%	113
Going to classical music concerts	25.4%	14.8%	14.9%	170
Going to rock music concerts	18.8%	21.3%	21.3%	88
Going dancing	18.7%	20.8%	20.8%	90
Going to the opera	16.1%	5.7%	5.7%	281
Going to day spas	15.0%	10.3%	10.3%	146
Going to rodeos	14.4%	8.2%	8.2%	175
Staying overnight in a hotel or B&B in your own city	14.1%	10.5%	10.6%	133
Going to the ballet	11.7%	7.0%	7.0%	166
Going to jazz clubs	11.0%	7.9%	7.9%	139

### Outdoor Activities Pursued While on Trips

Those who visited Manitoba were very active in outdoor activities while on trips. Relative to the average U.S. Pleasure Traveler, they are especially likely to have participated in sportsman activities (e.g., fishing, hunting), boating activities (e.g., sailing), motorized recreational activities (e.g., snowmobiling & ATVing, motorcycling), golfing and cross-country skiing while on trips during the past two years.

Fig. 9 Outdoor Activities Pursued While on Trips  
(See Appendix Two for a Definition of Each Type of Outdoor Activity)

Size of Market	Took a Trip to Manitoba	Did Not Take a Trip to Manitoba	Pleasure Travelers	Index
Size of Market	895,113	169,615,128	170,510,241	100
Wildlife Viewing	57.3%	34.8%	34.9%	164
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	38.9%	39.6%	39.6%	98
Fishing	37.0%	18.7%	18.8%	197
Boating & Swimming (e.g., motorboating, swimming in lakes)	35.8%	21.0%	21.0%	170
Hiking, Climbing & Paddling	30.0%	23.4%	23.5%	128
Games & Individual Sports (e.g., tennis, board games)	26.1%	22.2%	22.2%	117
Exercising & Jogging	23.7%	14.0%	14.1%	168
Golfing	17.8%	10.6%	10.7%	167
Hunting	17.3%	5.3%	5.4%	321
Team Sports (e.g., football, baseball, basketball)	15.2%	7.8%	7.9%	192
Snowmobiling & ATVing	15.0%	7.1%	7.1%	210
Downhill Skiing & Snowboarding	13.5%	8.0%	8.0%	168
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	11.9%	4.7%	4.8%	249
Horseback Riding	11.6%	6.1%	6.2%	188
Board & Blade (e.g., skateboarding, ice-skating)	10.8%	4.0%	4.0%	269
Extreme Air Sports (e.g., parachuting, bungee jumping)	10.2%	1.7%	1.7%	593
Motorcycling	9.6%	3.0%	3.1%	315
Cycling	8.0%	6.3%	6.3%	126
Cross-country Skiing & Snowshoeing	7.5%	1.8%	1.9%	400
Scuba & Snorkelling	6.7%	4.1%	4.1%	165
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	4.3%	0.3%	0.3%	1307

### Outdoor Activities Pursued While Not on Trips

When NOT traveling, those who visited Manitoba remain active in many outdoor activities. The majority go on day outings to local parks and picnic, exercise, garden and swim while not traveling. Relative to the average U.S. Pleasure Traveler, they are especially likely to go skiing (e.g., cross-country skiing, downhill skiing), play golf and to take part in nature-oriented activities (e.g., hunting, fishing, canoeing and kayaking, horseback riding).

Fig. 10 Outdoor Activities Pursued While NOT on Trips

	Took a Trip to Manitoba	Did Not Take a Trip to Manitoba	Pleasure Travelers	Index
Size of Market	895,113	169,615,128	170,510,241	100
Day outing to a park	63.9%	63.1%	63.1%	101
Exercising at home or at a fitness club	63.5%	56.0%	56.0%	113
Gardening	61.2%	53.0%	53.1%	115
Swimming	59.9%	56.5%	56.5%	106
Picnicking	55.1%	47.7%	47.7%	115
Fishing	44.7%	32.7%	32.8%	137
Hiking	40.3%	32.4%	32.5%	124
Sailing or other boating	33.7%	19.9%	20.0%	169
Camping	32.8%	26.7%	26.7%	123
Cycling	30.9%	22.8%	22.9%	135
Golfing	26.9%	18.2%	18.3%	147
Hunting	24.1%	11.7%	11.8%	205
Jogging	20.2%	19.5%	19.5%	104
Riding an all-terrain vehicle (ATV)	19.2%	11.4%	11.5%	167
Playing team sports	17.0%	15.8%	15.8%	108
Playing racquet sports (e.g., tennis or badminton)	15.7%	13.2%	13.2%	119
Horseback riding	13.6%	8.6%	8.6%	158
Canoeing or kayaking	13.2%	7.8%	7.8%	168
Downhill skiing	9.7%	5.7%	5.7%	170
Cross-country skiing	9.6%	2.5%	2.5%	384
Snowmobiling	9.2%	3.3%	3.3%	279
Ice-skating	8.8%	5.5%	5.5%	160
Rollerblading	6.7%	7.3%	7.3%	92
Snowboarding	3.3%	2.7%	2.7%	123
Skateboarding	2.5%	2.2%	2.2%	114

### Accommodation Stayed In While on Trips

Those who visited Manitoba were especially likely to have stayed in resorts (e.g., lakeside or riverside resorts, seaside resorts, ski or mountain resorts) and public campgrounds during the last two years. Relative to the average U.S. Pleasure Traveler, they were also especially likely to have stayed in a wilderness setting (e.g., wilderness lodge, remote fly-in outpost). They were also much more likely to have camped in a private campground, toured in a motor home or RV and stayed in accommodation that specializes in fine cuisine (e.g., country inn or resort with gourmet restaurant, cooking or wine tasting school).

Fig. 11 Accommodation Stayed In While on Trips

	Took a Trip to Manitoba	Did Not Take a Trip to Manitoba	Pleasure Travelers	Index
Size of Market	895,113	169,615,128	170,510,241	100
Lakeside / Riverside Resort	31.1%	12.3%	12.4%	250
A Public Campground in a National, State, Provincial or Municipal Park	30.3%	16.9%	16.9%	179
Seaside Resort	21.5%	18.3%	18.3%	117
A Private Campground	21.3%	10.1%	10.2%	209
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	16.6%	4.2%	4.2%	390
Ski Resort or Mountain Resort	16.0%	8.9%	9.0%	178
Wilderness Lodge You Can Drive to by Car	13.8%	3.4%	3.5%	395
Remote or Fly-In Wilderness Lodge	9.7%	0.8%	0.8%	1185
Farm or Guest Ranch	9.3%	2.0%	2.0%	467
Health Spa	8.4%	3.1%	3.1%	267
A Camp Site in a Wilderness Setting (Not a Campground)	8.2%	4.7%	4.7%	175
Country Inn or Resort with Gourmet Restaurant	7.5%	2.0%	2.0%	377
Remote or Fly-In Wilderness Outpost	7.4%	0.4%	0.4%	1669
On a Houseboat	7.1%	1.4%	1.4%	494
Cooking School	4.9%	0.6%	0.6%	858
Wine Tasting School	2.5%	0.4%	0.4%	595

### Tours and Cruises Taken During Past Two Years

Those who visited Manitoba were much more likely than the average U.S. Pleasure Traveler to have taken tours and cruises during the last two years. Sameday tours (both organized and self-guided), scenic drives in the countryside, city tours and overnight tours (both organized and self-guided) were the most popular with this segment. Those who visited Manitoba were especially likely to have taken cruises (e.g., Alaskan cruise, Great Lakes cruise, St. Lawrence River cruise) during the last two years. They were also much more likely than others to have taken organized, single location and multi-location tours during the last two years.

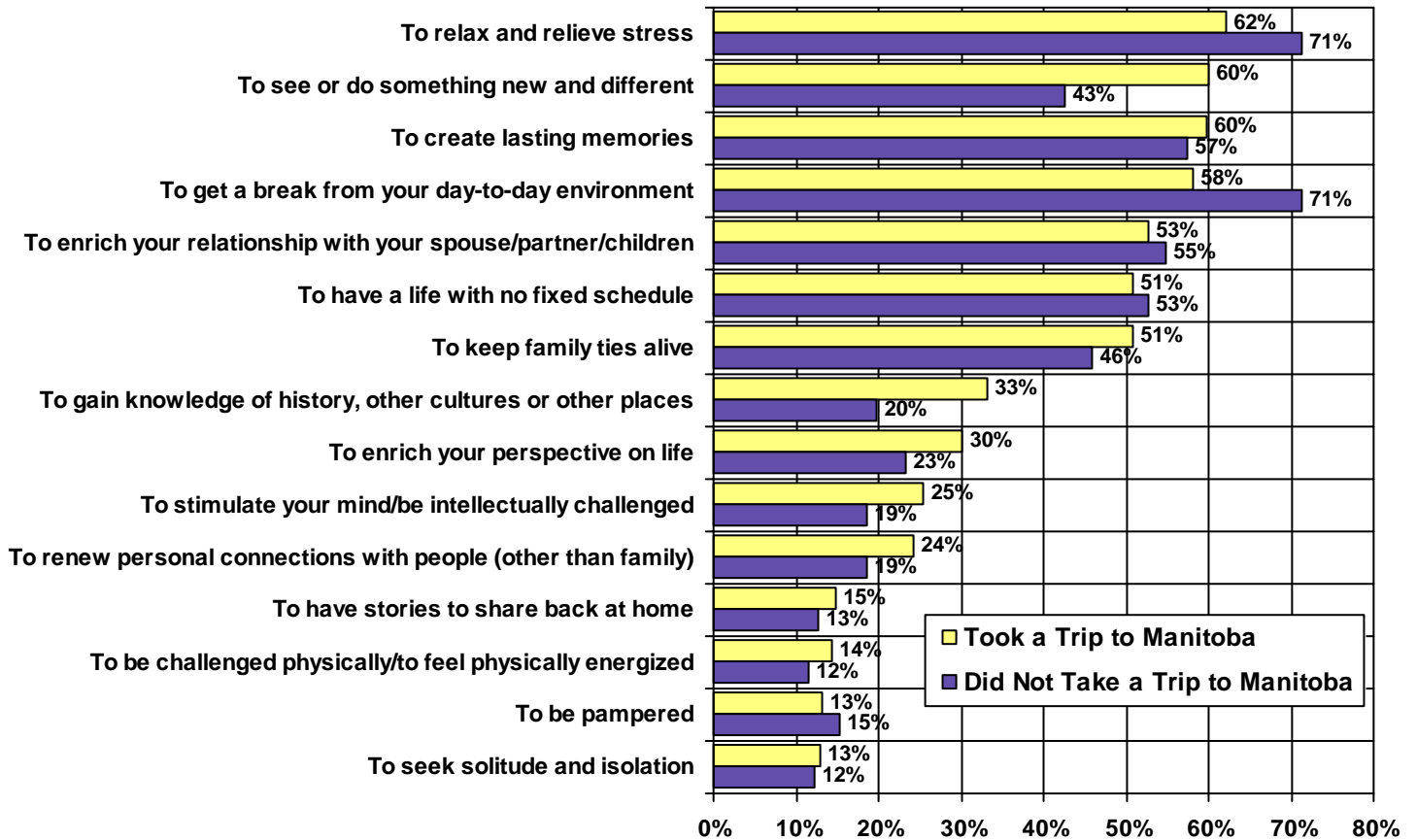
Fig. 12 Tours and Cruises Taken During Past Two Years

	Took a Trip to Manitoba	Did Not Take a Trip to Manitoba	Pleasure Travelers	Index
Size of Market	895,113	169,615,128	170,510,241	100
An organized, sameday, guided tour while on an overnight trip	32.9%	18.5%	18.5%	177
A self-guided, sameday tour while on an overnight trip	28.0%	19.2%	19.2%	146
Around the city	27.4%	15.7%	15.8%	174
Around the country side - scenic drives	27.0%	13.0%	13.1%	206
A self-guided, overnight tour where you stayed in different locations	22.2%	10.3%	10.4%	213
An organized, overnight, guided tour where you stayed in different locations	20.7%	7.8%	7.9%	263
An organized, overnight, guided tour where you stayed in a single location	19.4%	6.7%	6.7%	288
Caribbean ocean cruise	17.6%	8.9%	9.0%	195
On the water (sightseeing cruise)	17.5%	7.7%	7.8%	226
Wilderness tour	17.5%	7.4%	7.4%	236
Some other type of tour	16.0%	8.8%	8.8%	181
Alaskan ocean cruise	12.2%	2.4%	2.5%	487
Ocean cruise - Other	11.3%	4.8%	4.8%	235
To a casino	10.6%	4.9%	4.9%	217
To a winery	9.2%	3.5%	3.6%	256
In the air as a pilot or passenger of an airplane or helicopter	7.2%	1.4%	1.4%	511
To a factory	6.9%	1.8%	1.8%	380
Some other type of cruise	6.5%	1.7%	1.7%	380
Cruise on another lake or river	6.3%	1.9%	2.0%	318
Great Lakes cruise	3.8%	0.4%	0.4%	980
Cruise on the St. Lawrence River	2.2%	0.3%	0.3%	788
Submarine cruise	2.1%	0.2%	0.2%	864

### Benefits Sought While on Vacation

As with most U.S. Pleasure Travelers, those who visited Manitoba take vacations to relax and relieve stress, get a break from their day-to-day environment, create lasting memories, enrich their relationships with family members and to see and something new. However, relative to other U.S. Pleasure Travelers, those who visited Manitoba are especially likely to pursue vacations that offer learning opportunities, intellectual stimulation and novelty.

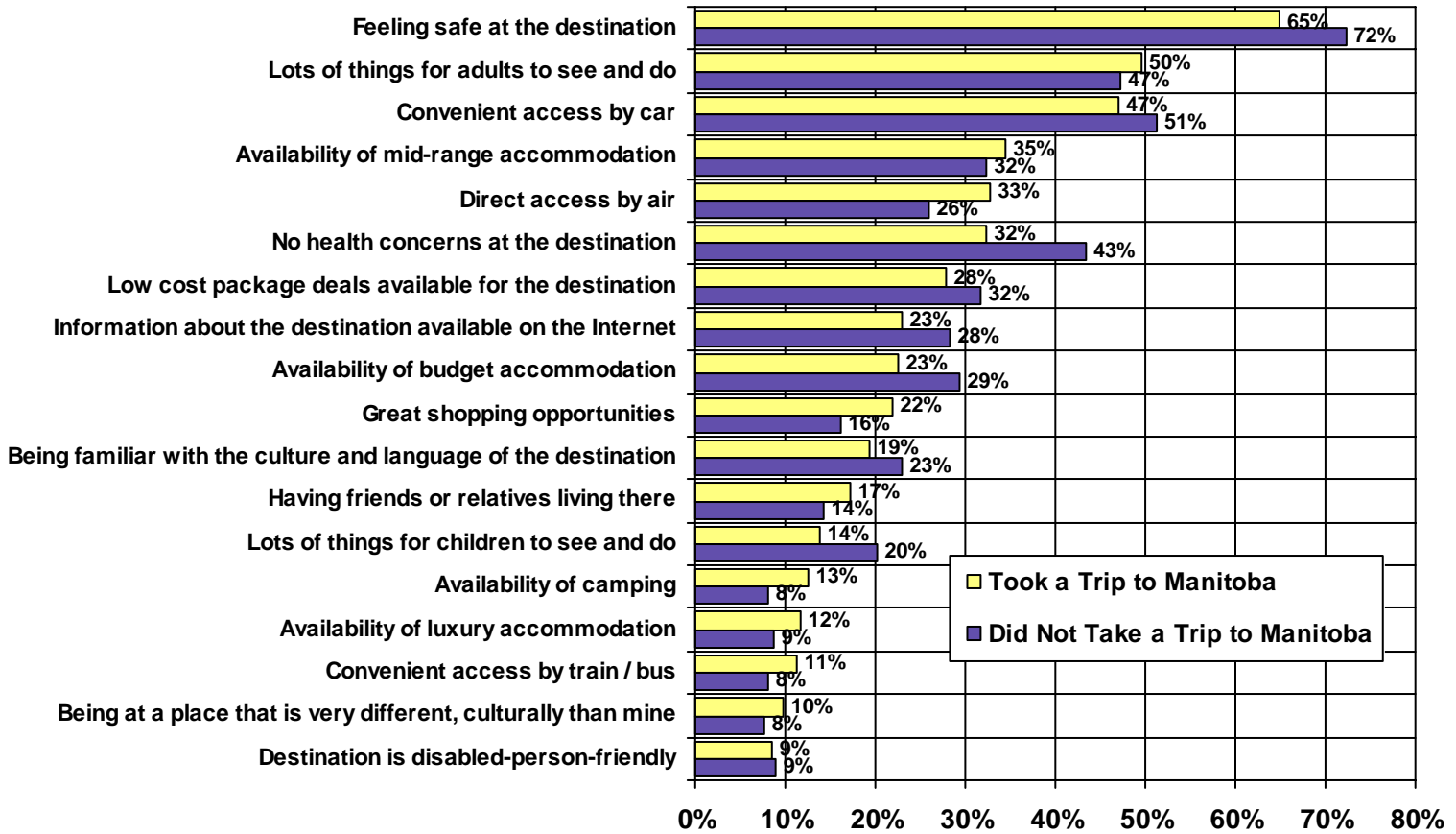
Fig.13 Benefits Sought While on Vacation  
(Percent Rating Each Benefit as “Highly Important”)



**Other Attributes of a Destination Considered Important**

As with most U.S. Pleasure Travelers, those who took a trip to Manitoba consider it important that they feel safe at a destination. However, relative to other U.S. Pleasure Traveler, Manitoba Visitors are especially likely to look for destinations that are culturally distinctive, have both luxury accommodation and camping available and great shopping opportunities. They also consider it important that a destination is directly accessible either by air, bus or train. On the other hand, reflecting their age and affluence, they are less concerned whether a destination has lots of activities for children, budget accommodation or information available on the Internet.

Fig. 14 Importance of Destination Attributes (% Rating Each Attribute as "Highly Important")



## How Destinations Are Selected

Similar to the average U.S. Pleasure Traveler, the majority of Manitoba visitors start planning vacations with a particular destination in mind. However, those who have visited Manitoba in the last two years are more likely than the average U.S. Pleasure Traveler to begin planning trips by first considering what activities they would like to do and what vacation experience they would like to have.

Fig. 15 How Destinations Are Selected (Summer and Winter Vacations)

	Took a Trip to Manitoba	Did Not Take a Trip to Manitoba	Pleasure Travelers	Index
Size of Market	895,113	169,615,128	170,510,241	100
<b>Summer</b>				
Started with a desired destination in mind	57.4%	58.2%	58.2%	99
Started by considering specific activities wanted to do	15.1%	9.9%	9.9%	152
Started with a certain type of vacation experience in mind	18.4%	17.3%	17.3%	107
Looked for packaged deals - no destination in mind	1.7%	1.1%	1.1%	155
Considered something else first	3.4%	4.6%	4.6%	73
Don't know / Other	4.0%	8.9%	8.9%	45
<b>Winter</b>				
Started with a desired destination in mind	59.0%	58.9%	58.9%	100
Started by considering specific activities wanted to do	13.8%	11.2%	11.3%	123
Started with a certain type of vacation experience in mind	19.2%	14.7%	14.8%	130
Looked for packaged deals - no destination in mind	0.7%	1.4%	1.4%	49
Considered something else first	3.9%	5.4%	5.3%	74
Don't know / Other	3.3%	8.3%	8.3%	40

### Trip Planning and Information Sources Consulted

Similar to the average U.S. Pleasure Traveler, most of those who took a trip to Manitoba were responsible for planning their trips either on their own (40.7%) or with someone else (19.2%). When making vacation plans, they tended to consult a wider variety of sources than the average U.S. Pleasure Traveler. The majority use Internet websites, past experience and word-of-mouth to plan their travel. However, visitors to Manitoba are especially likely to obtain travel information from official government travel brochures or guides and visitor centers, newspaper or magazine articles and advertising, travel information received in the mail and trade, travel or sports shows.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Took a Trip to Manitoba	Did Not Take a Trip to Manitoba	Pleasure Travelers	Index
Size of Market		895,113	169,615,128	170,510,241	100
Who Plans Trips?	Respondent plans trips	40.7%	39.2%	39.2%	104
	Trip planning a shared responsibility	19.2%	17.6%	17.6%	109
	Someone else plans trips	40.1%	43.2%	43.2%	93
Information Sources Consulted	An Internet website	72.3%	76.0%	76.0%	95
	Past experience / Been there before	60.6%	54.5%	54.5%	111
	Advice of others / Word-of-mouth	56.1%	45.3%	45.4%	124
	Maps	49.9%	32.6%	32.7%	153
	Official travel guides or brochures from state / province	49.7%	20.4%	20.6%	242
	Articles in newspapers / magazines	40.3%	18.0%	18.1%	222
	Travel information received in the mail	39.6%	15.6%	15.8%	251
	Visitor information centres	38.3%	20.3%	20.4%	188
	An auto club such as AAA	34.8%	23.9%	24.0%	145
	A travel agent	33.2%	18.6%	18.6%	178
	Advertisements in newspapers / magazines	28.9%	10.8%	10.9%	266
	Travel guide books such as Fodor's	17.2%	12.0%	12.0%	143
	Programs on television	14.2%	7.1%	7.1%	200
	An electronic newsletter or magazine received by e-mail	12.2%	6.0%	6.0%	202
	Visits to trade, travel or sports shows	12.1%	2.4%	2.4%	498
Advertisements on television	7.9%	4.0%	4.0%	197	

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

Those who took a trip to Manitoba are similar to other U.S. Pleasure Travelers in their use of the Internet to research travel (66.7%), but slightly less likely to book travel (45.7%) online. The majority consult hotel or resort websites, travel planning or booking websites (e.g., Expedia), the websites of specific countries, regions or cities and airline websites. However, they are especially likely to have visited the websites of cruise lines or motorcoach lines during the past two years. As with most U.S. Pleasure Travelers, Manitoba visitors most often use the Internet to purchase airline tickets and accommodation. However, Manitoba visitors are also especially likely to use the Internet to purchase fares for travel by rail, bus or boat / ship.

Fig. 17 Use of the Internet to Plan and Book Travel

		Took a Trip to Manitoba	Did Not Take a Trip to Manitoba	Pleasure Travelers	Index
Size of Market		895,113	169,615,128	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	33.3%	31.0%	31.0%	108
	Uses Internet to plan trips only	21.0%	20.1%	20.1%	104
	Uses Internet to book part of trip	45.7%	48.9%	48.9%	93
Types of Websites Consulted	A website of a hotel or resort	62.0%	53.3%	53.3%	116
	A travel planning / booking website	59.1%	55.6%	55.6%	106
	A tourism website of a country / region / city	56.8%	35.0%	35.1%	162
	An airline website	55.2%	45.5%	45.6%	121
	A website of an attraction	36.3%	33.4%	33.4%	109
	Some other website	30.6%	25.0%	25.1%	122
	A cruise line website	24.9%	12.4%	12.4%	200
	A motorcoach website	5.9%	1.3%	1.3%	441
Parts of Trips Booked Over The Internet	Accommodation	74.3%	71.8%	71.9%	103
	Air tickets	71.7%	70.5%	70.6%	102
	Car rental	44.6%	37.9%	38.0%	118
	Tickets or fees for specific activities or attractions	31.2%	26.3%	26.3%	118
	A package containing two or more items	28.8%	17.7%	17.8%	162
	Tickets for rail, bus or boat / ship fares	23.8%	11.8%	11.9%	201
	Other	4.8%	2.9%	2.9%	163

### Media Consumption Habits

Americans who traveled to Manitoba are above-average consumers of travel media (e.g., travel sections of newspapers, travel magazines, travel programs on television, travel websites). Considering this segment's keen interest in learning, Manitoba visitors may also be effectively reached through educational television programs and magazines (e.g., history, science), news media (e.g., newspapers and newspaper websites, television news, news/talk radio, weather websites) and multicultural and classical music radio stations.

Fig. 18 Media Consumption Habits

		Took a Trip to Manitoba	Did Not Take a Trip to Manitoba	Pleasure Travelers	Index
Size of Market		895,113	169,615,128	170,510,241	100
Newspaper Readership	Reads daily newspaper	75.4%	59.8%	59.9%	126
	Reads weekend edition of newspaper	61.7%	55.5%	55.5%	111
	Reads local neighbourhood or community newspapers	62.2%	49.5%	49.5%	126
	Reads other types of newspapers	21.9%	13.8%	13.9%	158
	Frequently or occasionally reads travel section of daily newspaper	65.7%	42.9%	43.0%	153
	Frequently or occasionally reads travel section of weekend newspaper	70.0%	49.2%	49.3%	142
Types of Magazines Read (Top 5 Indexed)	Travel (e.g., Conde Nast)	21.1%	10.6%	10.6%	199
	General interest	40.8%	20.7%	20.8%	196
	Outdoor activities / sports	19.9%	10.7%	10.7%	186
	Regional magazines	12.2%	6.8%	6.8%	179
	Science and geography	23.6%	14.0%	14.0%	168
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	43.4%	28.9%	28.9%	150
	History	55.1%	44.9%	45.0%	122
	Science & nature shows	44.4%	36.7%	36.8%	121
	News / current affairs	69.0%	57.9%	58.0%	119
	Shopping channels	9.1%	7.7%	7.7%	118
Type of Radio Programs Listened To (Top 5 Indexed)	Multicultural	10.0%	4.7%	4.7%	211
	Classical music	25.4%	14.1%	14.1%	179
	Jazz / Big band	15.8%	10.0%	10.0%	158
	News / Talk / Information	45.1%	32.3%	32.4%	139
	Country music	39.2%	32.4%	32.4%	121
Types of Websites Visited (Top 5 Indexed)	Sites for specific activities or interests	44.7%	32.5%	32.5%	137
	Travel	61.3%	47.9%	48.0%	128
	Weather	68.0%	58.4%	58.5%	116
	Newspaper sites	34.3%	29.6%	29.6%	116
	Sports	32.3%	29.9%	30.0%	108

<b>Appendix One</b>		
<b>U.S. TAMS 2006 Culture and Entertainment Segmentation</b>		
<b>Activity Segment</b>	<b>Activities in Segment</b>	
<b>Historical Sites, Museums &amp; Art Galleries</b>	Well-known Historic Sites or Buildings	Well-known Natural Wonders
	Other Historic Sites, Monuments and Buildings	Historical Replicas of Cities or Towns With Historic Re-Enactments
	Strolling Around a City to Observe Buildings and Architecture	Museum - Military /War Museums
	Museum - General History or Heritage Museums	Art Galleries
<b>Shopping &amp; Dining</b>	Shop Or Browse - Bookstore or Music Store	Shop Or Browse - Antiques
	Shop Or Browse - Clothing, Shoes and Jewellery	Shop Or Browse - Gourmet Foods in Retail Stores
	Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	Shop Or Browse - Greenhouse or Garden Centre
	Dining - Restaurants Offering Local Ingredients and Recipes	Went to Local Outdoor Cafes
<b>Aboriginal Cultural Experiences</b>	Aboriginal Cuisine (Tasted or Sampled)	Aboriginal Arts and Crafts Shows
	Aboriginal Heritage Attractions (e.g., Museums, Interpretive Centres)	Aboriginal Cultural Experiences in a Remote or Rural Setting
	Aboriginal Festivals & Events (e.g., Powwows)	Aboriginal Outdoor Adventure and/or Sports
<b>Fairs &amp; Festivals</b>	Farmers' Markets or Country Fairs	Firework Displays
	Carnivals	Ethnic Festivals
	Exhibition or Fairs	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Food/Drink Festivals	Circus
<b>Science &amp; Technology Exhibits</b>	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
<b>Theme Parks &amp; Exhibits</b>	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Wax Museums
<b>High Art Performances</b>	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	Jazz Concert
<b>Professional Sporting Events</b>	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	
<b>Theatre, Film &amp; Musical Festivals</b>	Theatre Festivals	International Film Festivals
	Comedy Festivals	Music Festivals
	Literary Festivals or Events	
<b>Tastings</b>	Went to Wineries for Day Visits and Tasting	Cooking/Wine Tasting Courses
	Went to Breweries for Day Visits and Tasting	Visited Food Processing Plants (e.g., Cheese Factory)
<b>Casino, Theatre &amp; Comedy Clubs</b>	Stand-Up Comedy Clubs and Other Variety Shows	Live Theatre with Dinner
	Went to a Casino	Live Theatre
<b>Participatory Historical Activities</b>	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National/Provincial Park
	Curatorial Tours	
<b>National &amp; International Sporting Events</b>	National/International Sporting Events such as the Olympic Games	Curling Bonspiel
	Professional Figure Skating	Professional Soccer Games

<b>Appendix One</b>		
<b>U.S. TAMS 2006 Culture and Entertainment Segmentation</b>		
<b>Gardens Theme Attractions</b>	Garden Theme Park	Botanical Gardens
<b>Rock Concerts &amp; Dancing</b>	Rock & Roll / Popular Music Concert	Recreational Dancing
<b>Archaeological Digs &amp; Sites</b>	Archaeological Digs	Paleontological / Archaeological Sites
<b>Equestrian &amp; Western Events</b>	Equine (Horse) Competitions	Country / Western Music Concerts
	Western Theme Events (e.g., Rodeos)	Auto Races
	Horse Races	
<b>Fine Dining &amp; Spas</b>	High-End Restaurants with an International Reputation	Day Visit to a Health and Wellness Spa while on an Overnight Trip
	Other High-End Restaurants	
<b>Agro-Tourism</b>	Dining At A Farm	Harvesting and /or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	Entertainment Farms (e.g., Corn Maze, Petting Barnyard)
<b>Amateur Tournaments</b>	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related

### Appendix Two: U.S. TAMS 2006 Outdoor Activity Segmentation

Activity Segment	Activities in Segment	
Golfing	Played During a Stay at a Golf Resort with Overnight Stay	Golf Tour Package to Play on Various Courses
	Played an Occasional Game While on a Trip	
Hunting	Hunting for Small Game	Hunting for Birds
	Hunting for Big Game	
Fishing	Fresh Water Fishing	Salt Water Fishing
	Ice Fishing	Trophy Fishing
Wildlife Viewing	Viewing Land Based Animals	Bird Watching
	Whale Watching & Other Marine Life	Visited National, Provincial /State Park
	Wildflowers /Flora Viewing	Viewing Northern Lights
Hiking, Climbing & Paddling	Mountain Climbing /Trekking	Fresh Water Kayaking /Canoeing
	Rock Climbing	White Water Rafting
	Hiking /Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
	Ice Climbing	Wilderness Skills Courses
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkelling in Sea /Ocean
	Sunbathing, Sitting on a Beach	Ocean Kayaking or Canoeing
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Scuba & Snorkelling	Scuba Diving in Lakes /Rivers	Scuba Diving in Sea /Ocean
	Snorkelling in Lakes /Rivers	
Exercising & Jogging	Working Out in Fitness Centre	Jogging or Exercising Outdoors
Cycling	Overnight Touring Trip	Recreational - Same Day Excursion
	Mountain Biking	
Motorcycling	Overnight Touring Trip	Same Day Excursion
Horseback Riding	With an Overnight Stop	Same Day Excursion
Snowmobiling & ATVing	All Terrain Vehicle - Overnight Touring Trip	Snowmobiling As an Overnight Touring Trip
	All Terrain Vehicle - Same Day Excursion	Snowmobiling Day Use on Organized Trail
Downhill Skiing & Snowboarding	Snowboarding	Downhill Skiing
Cross-country Skiing & Snowshoeing	Cross-country Skiing	Snowshoeing
Extreme Skiing	Heli-Skiing	Cross Country or Back Country as an Overnight Touring Trip
	Ski Jouring	
Hockey, Skating, Rollerblading & Skateboarding	Ice-Hockey	In-Line /Rollerblading
	Ice-Skating	Skateboarding
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	Bungee Jumping
Team Sports	Football	Basketball
	Baseball or Softball	Soccer
Games & Individual Sports	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	