

Travel Activities & Motivation Survey

# Out-of-Town Business Travel Market Profile Report

# Travel Activities & Motivation Survey

Prepared By:

**Lang Research Inc.**

on behalf of

**Atlantic Tourism Partnership**

**Canadian Tourism Commission**

**Department of Canadian Heritage**

**Greater Toronto Hotel Association**

**Manitoba Ministry of Industry, Trade & Tourism**

**Northern Ontario Heritage Fund**

**Ontario Casino Corporation**

**Ontario Ministry of Agriculture, Food & Rural Affairs**

**Ontario Tourism, Culture & Recreation**

**Ontario Tourism Marketing Partnership**

**Parks Canada**

**Saskatchewan Tourism Authority**

**Tourism B.C.**

**Tourism Toronto**

**Yukon Government Department of Tourism**

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# Out-of-Town Business Travel Market

## - Executive Summary -

Americans were 29.4% more likely than Canadians to have attended at least one out-of-town convention, trade show, conference or seminar (i.e., business event) during the past two years. Overall, 28.1% of American adults and 21.7% of Canadian adults had attended at least one of these out-of-town business events.

Attendance at out-of-town business events increased sharply with the level of education and household income of the respondent. Men were also more likely to have attended such events than women with this gender gap more evident in Canada. Affluent Young Couples, Affluent Families, Affluent Mature and Senior Couples and Affluent Mature Singles were all more likely to have attended out-of-town business events during the past two years.

Out-of-town business event attendees represent an attractive travel market for Canada based on their affluence and travel patterns. They were more likely to have travelled in Canada during the past two years and more likely to expect to travel in Canada during the next two years.

The relative affluence of business event travellers is reflected in the vacation experiences sought during the past two years. They were more likely than the average traveller to have sought out a wide variety of vacation experiences and appear to value eclectic vacations. They were especially likely to have sought out personal indulgence (e.g., enjoying fine dining and nightlife), romance and relaxation, and exploratory vacation experiences (e.g., visiting museums and art galleries, visiting historical sites, viewing natural wonders). Their preferences were further distinguished from the norm by their enthusiasm for a full range of culture and entertainment activities; especially attending professional sports events, shopping and dining, and visiting museums, galleries and historical sites. They also embraced a wide range of outdoor activities while travelling, most notably golfing, swimming and sunbathing, and fitness activities.

Out-of-town business event attendees were more likely than others to prefer luxurious accommodations (e.g., resorts, accommodations offering B&B, spa or gourmet restaurant facilities). They were also more likely to have taken wine tours and scenic day tours by boat or train and frequently tour using their personal vehicles when compared to the average traveller.

Out-of-town business event attendees consulted a wide array of information sources to plan their travel. They were much more likely than others to use the Internet for researching as well as for booking travel arrangements. Travel agents and various print publications (especially general interest and travel magazines) also were important sources of information to help plan trips.

# Background

An association of Canadian tourism ministries and organizations has collaborated to conduct two large-scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities & Motivation Survey* (TAMS), represents the comprehensive assessment of travel behaviour and motivators, and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace, as well as the factors which motivate travel behaviour. The TAMS database consists of a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. Persons participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mail-back questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these 11,892 (29.5%) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2%) returning the questionnaire while 6,405 (26.0%) of the U.S. respondents returned the questionnaire.

The current study examines persons who travelled out-of-town to attend business conventions, trade shows, conferences and seminars. The TAMS database was used to identify sectors of the market that had attended one or more out-of-town business conventions, trade events, conferences or seminars during the past two years. This report examines the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations, and impressions of Canada and Ontario among attendees, and compares these to those of non-attendees. This report also identifies the overall market potential of each segment of the market to indicate those segments that offer the best potential for marketing, advertising and promotional activities designed to promote Canada or Ontario to attendees of conventions, tradeshow, conferences and seminars.

# Business Event Attendance Index: Construction of the Index

The TAMS mailback survey contained three items specifically associated with travel to attend out-of-town business conventions, tradeshows, conferences or seminars which were used to construct an overall Attendee Participation Index. These were:

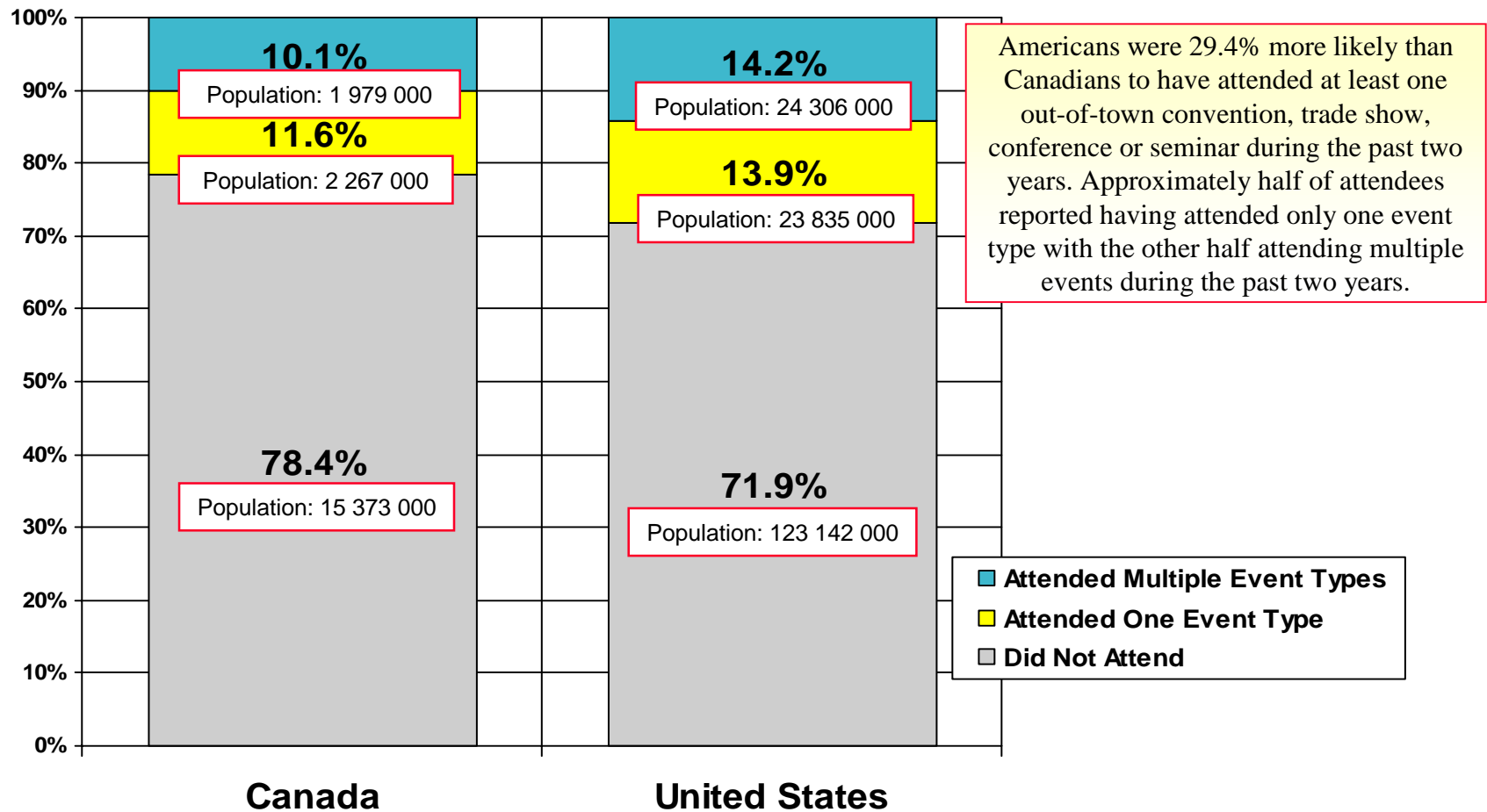
- Having attended out-of-town business conventions during the past two years
- Having attended out-of-town conferences or seminars during the past two years
- Having attended out-of-town tradeshows during the past two years

The responses to these three items were combined to overall participation and classified into three groups:

- **Non-attendee:** Did not attend an out-of-town convention, tradeshow, conference or seminar
- **Attended One Event Type:** Attended either an out-of-town convention, tradeshow, conference or seminar, but not more than one
- **Attended Multiple Event Types:** Attended at least two of the three out-of-town event types

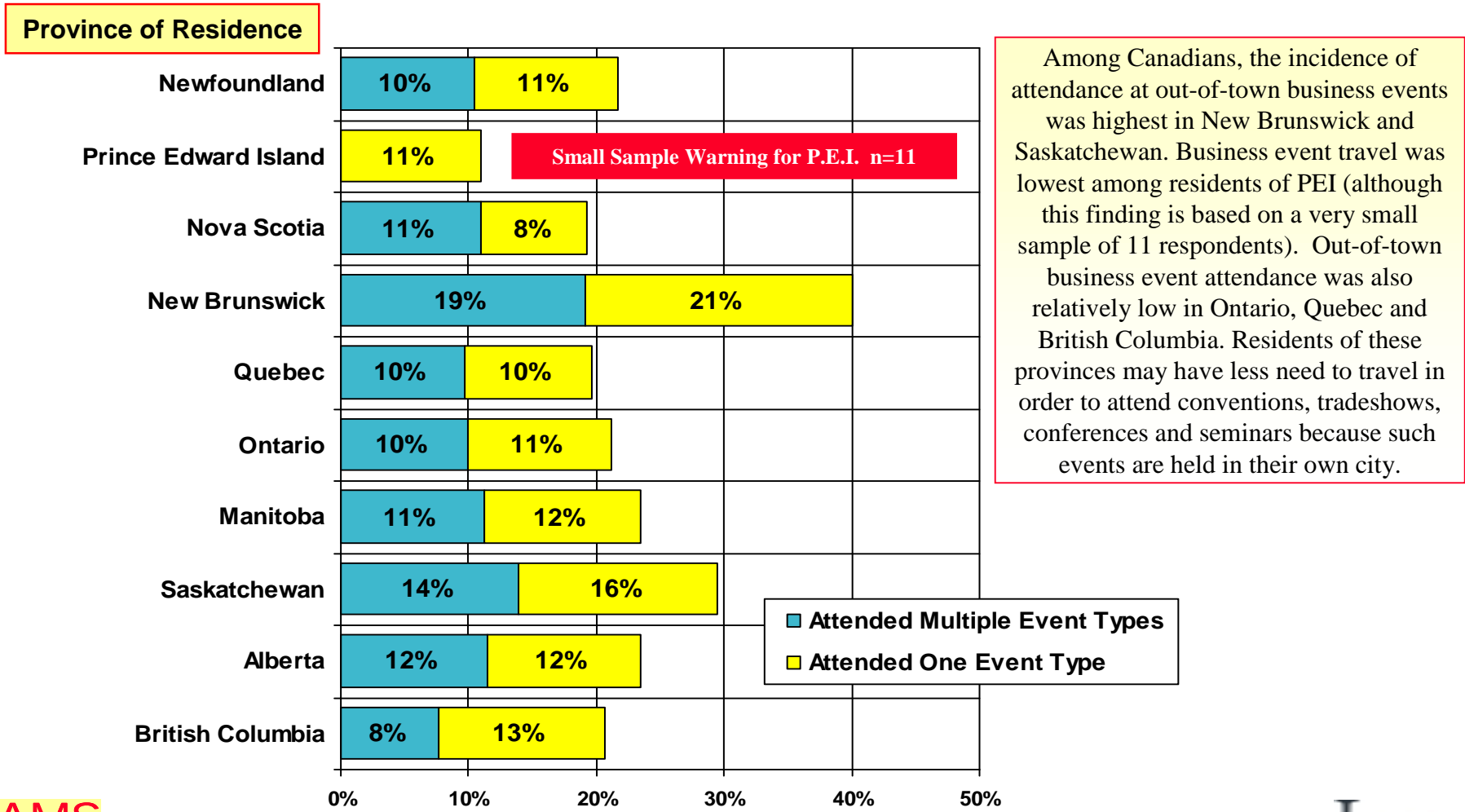
## Attending Out-of-Town Business Events Canada versus United States

Base: Number of event types attended;  
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



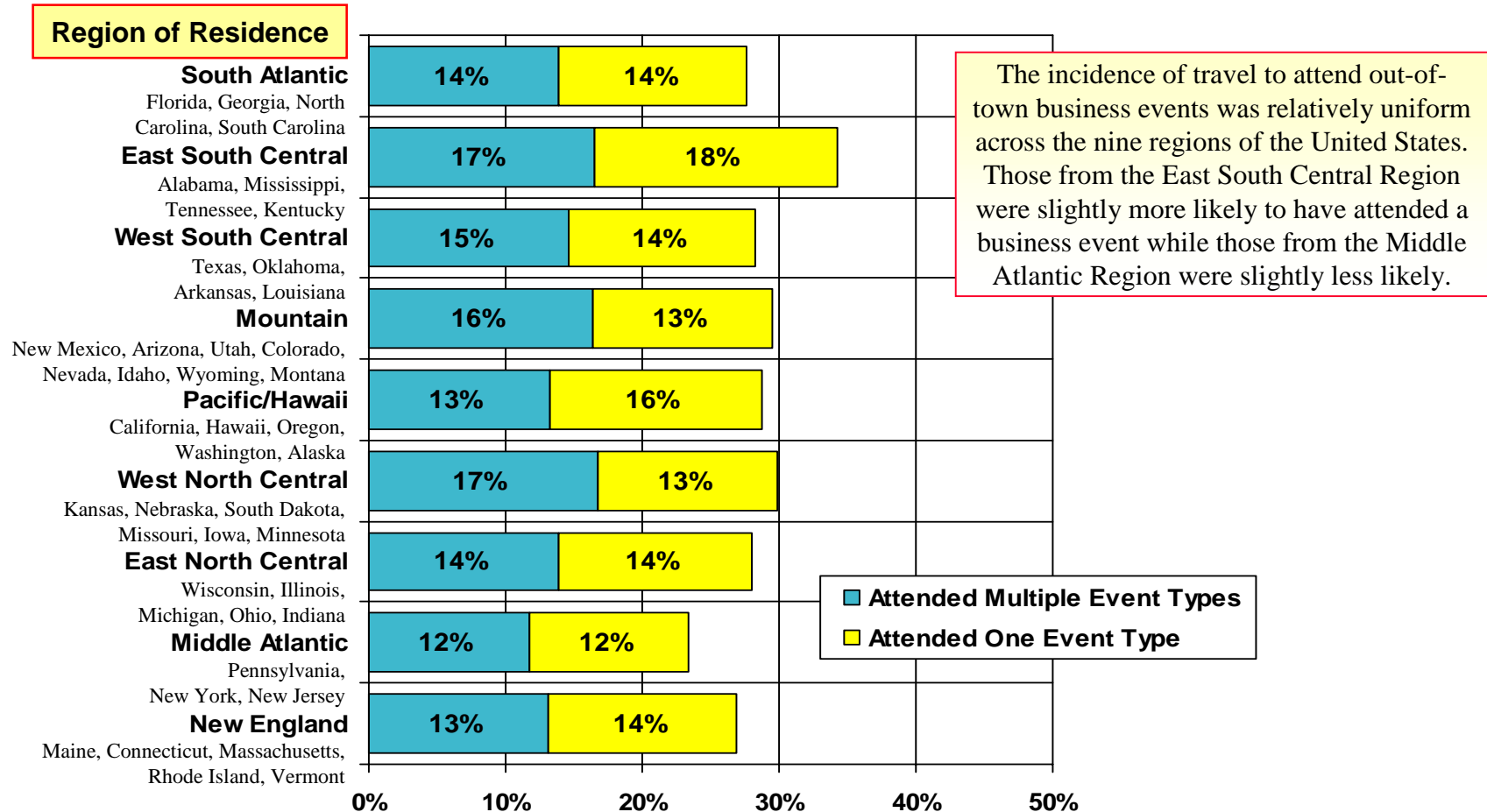
## Attending Out-of-Town Business Events Canada: By Province

Base: Number of types attended;  
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



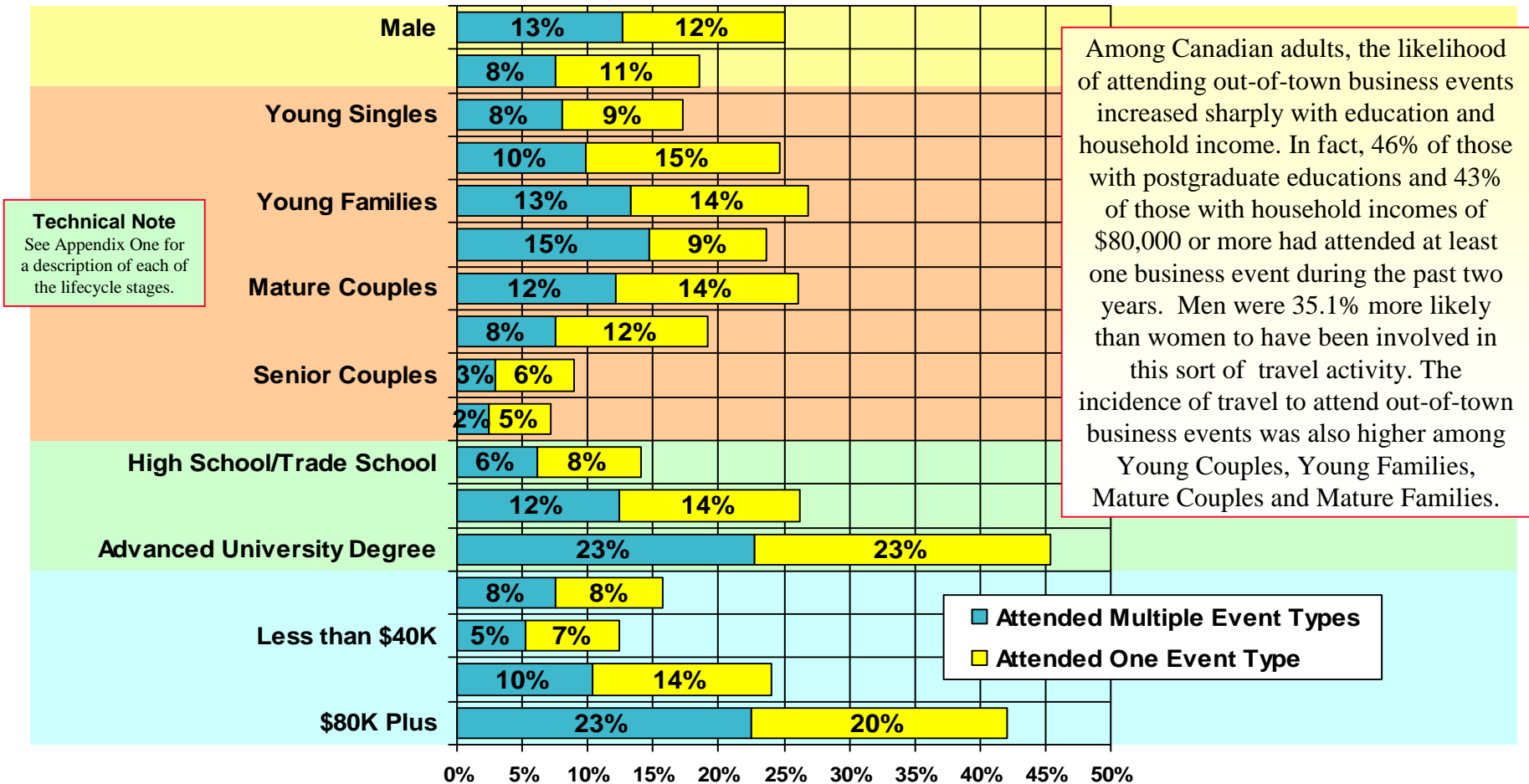
## Attending Out-of-Town Business Events United States: By Region

Base: Number of event types attended;  
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



## Attending Out-of-Town Business Events By Demographics: Canada

Base: Number of event types attended;  
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



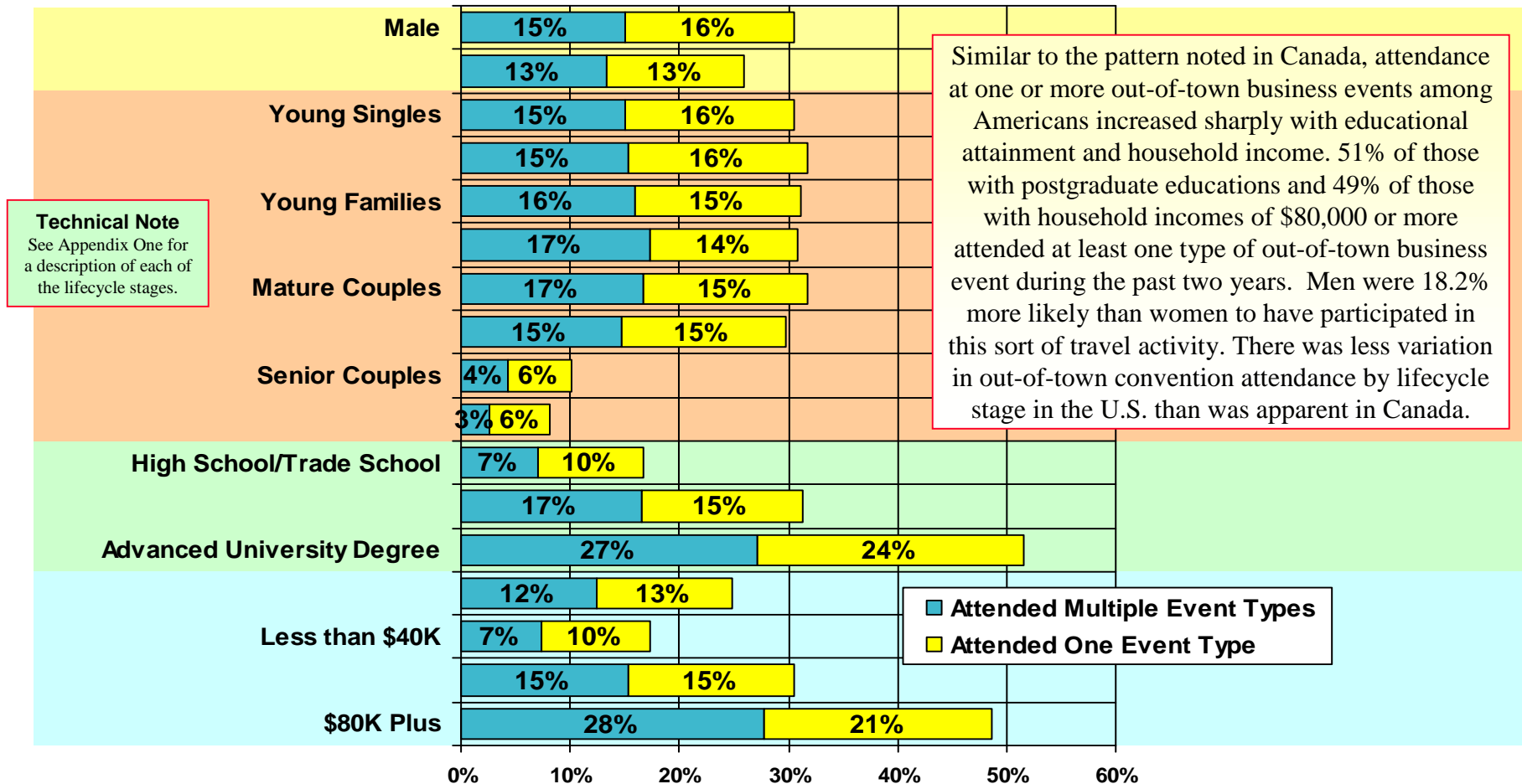
**Technical Note**  
See Appendix One for a description of each of the lifecycle stages.

Among Canadian adults, the likelihood of attending out-of-town business events increased sharply with education and household income. In fact, 46% of those with postgraduate educations and 43% of those with household incomes of \$80,000 or more had attended at least one business event during the past two years. Men were 35.1% more likely than women to have been involved in this sort of travel activity. The incidence of travel to attend out-of-town business events was also higher among Young Couples, Young Families, Mature Couples and Mature Families.

■ Attended Multiple Event Types  
■ Attended One Event Type

## Attending Out-of-Town Business Events By Demographics: United States

Base: Number of event types attended;  
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



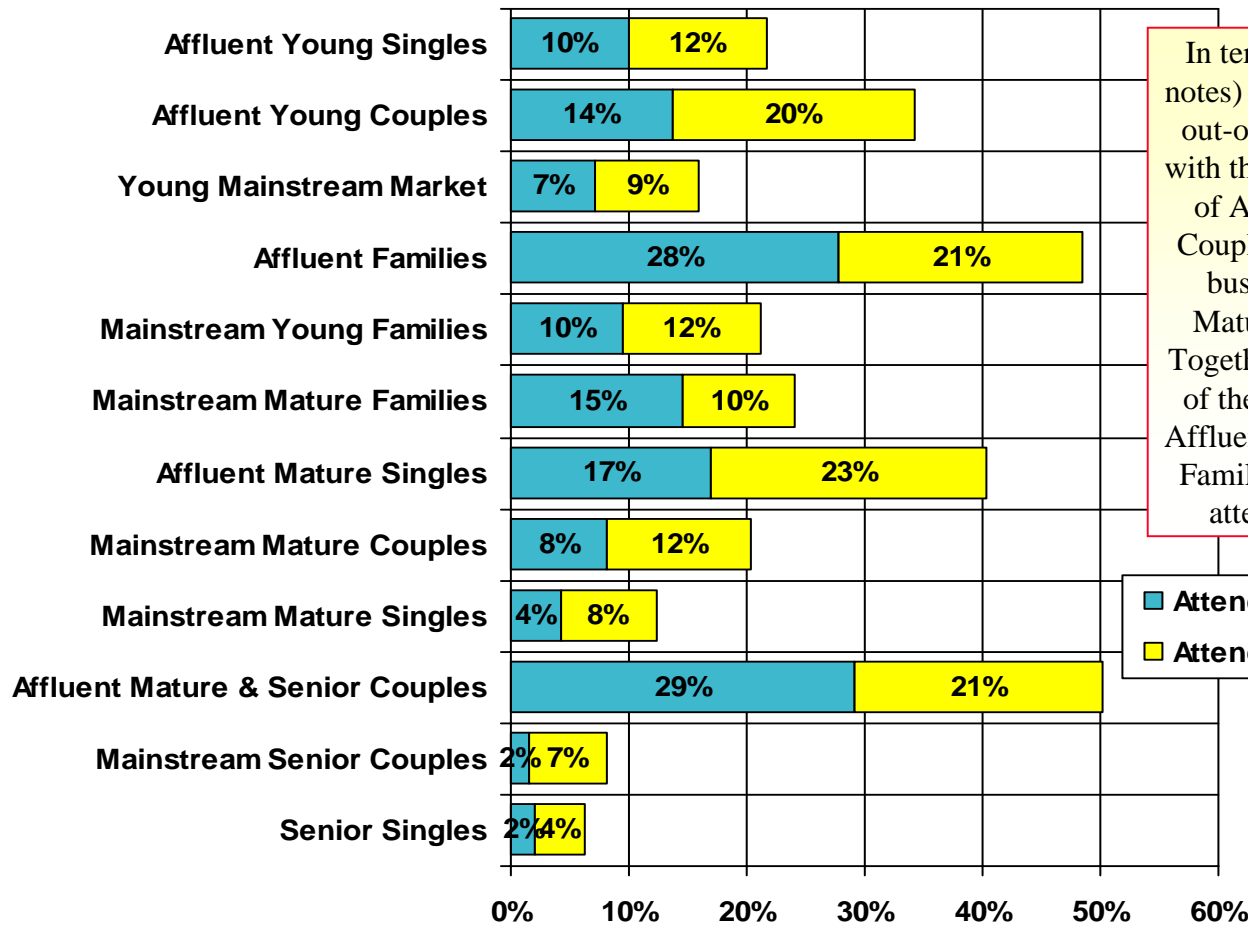
**Technical Note**  
See Appendix One for a description of each of the lifecycle stages.

Similar to the pattern noted in Canada, attendance at one or more out-of-town business events among Americans increased sharply with educational attainment and household income. 51% of those with postgraduate educations and 49% of those with household incomes of \$80,000 or more attended at least one type of out-of-town business event during the past two years. Men were 18.2% more likely than women to have participated in this sort of travel activity. There was less variation in out-of-town convention attendance by lifecycle stage in the U.S. than was apparent in Canada.

■ Attended Multiple Event Types  
■ Attended One Event Type

## Attending Out-of-Town Business Events By Market Segment: Canada

Base: Number of event types attended;  
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



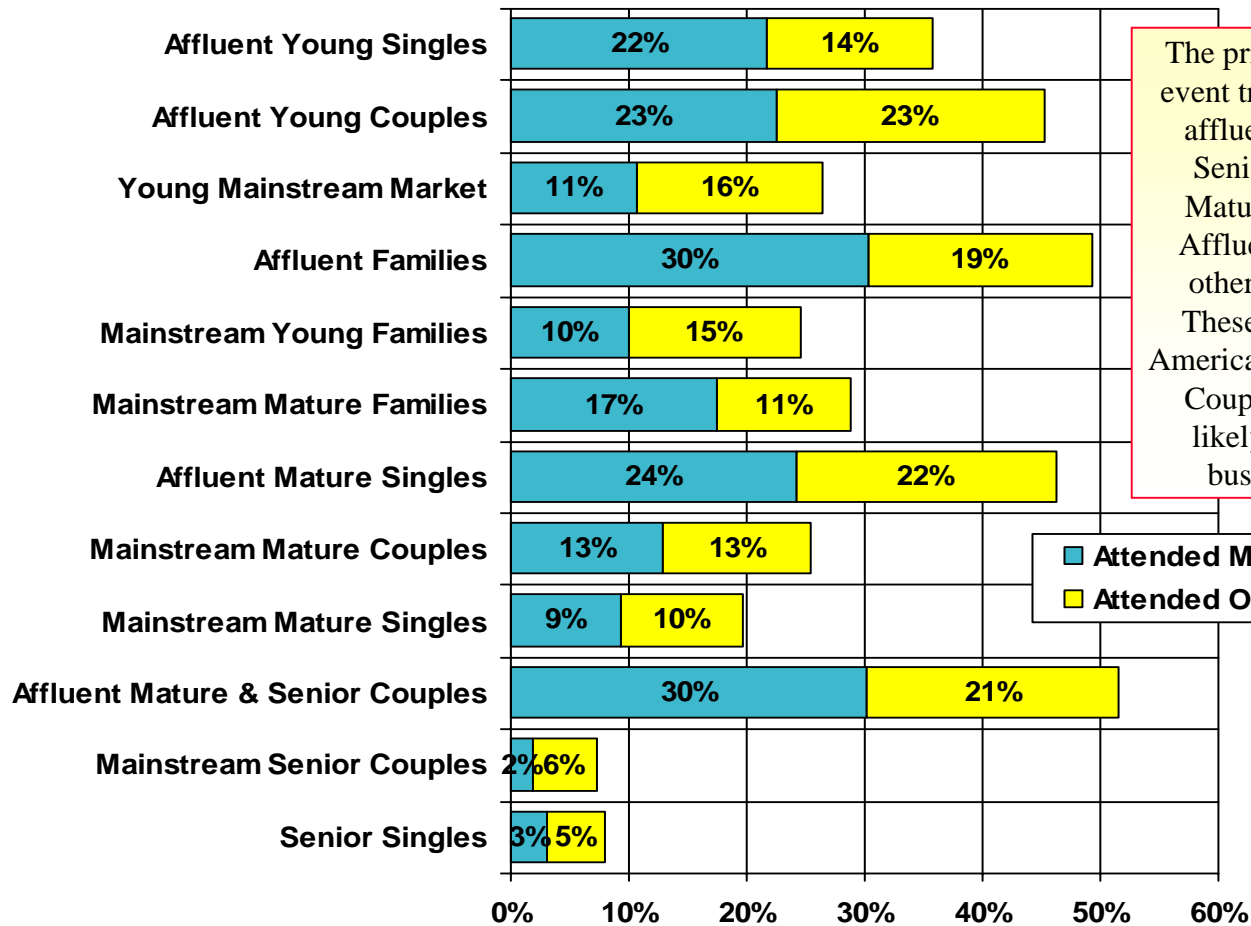
In terms of the market segments (see technical notes) in Canada, the incidence of travel to attend out-of-town business events was closely linked with the affluence and age of travellers. Members of Affluent Families and Affluent and Senior Couples comprised the prime target markets for business event travel, followed by Affluent Mature Singles and Affluent Young Couples. Together, these four segments account for 18.5% of the Canadian travel market. Members of the Affluent Mature and Senior Couples and Affluent Families segments were the most likely to have attended multiple types of business events.

■ Attended Multiple Event Types  
■ Attended One Event Type

**Technical Note**  
The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.

## Attending Out-of-Town Business Events By Market Segment: United States

Base: Number of event types attended;  
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



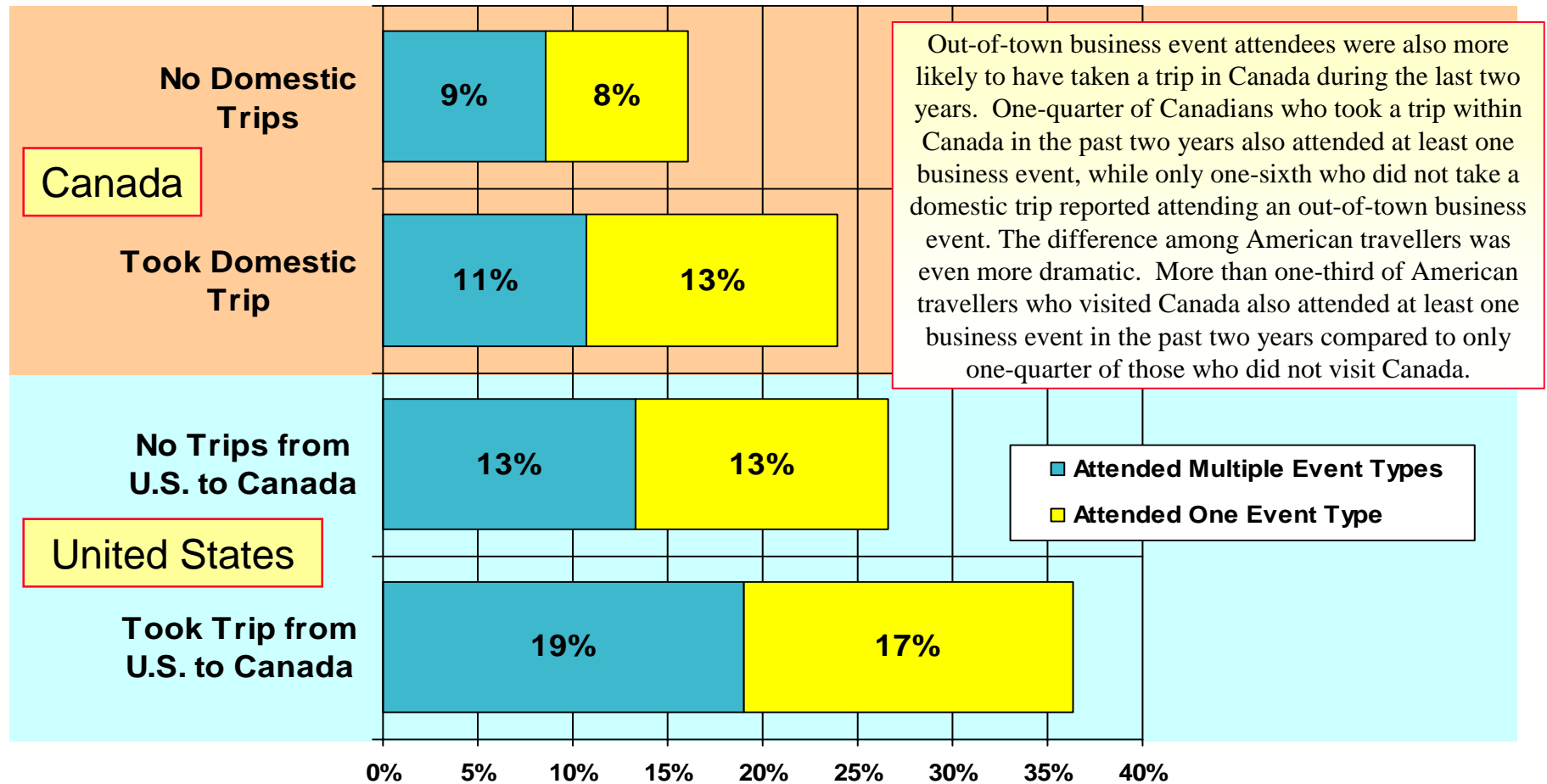
The prime American target markets for business event travel activities were also found among the affluent market segments. Affluent Mature & Senior Couples, Affluent Families, Affluent Mature Singles, Affluent Young Couples and Affluent Young Singles were more likely than others to attend out-of-town business events. These five segments account for 27.4% of the American travel market. Affluent Mature & Senior Couples and Affluent Families were the most likely to have attended two or more types of business events during the past two years.

■ Attended Multiple Event Types  
■ Attended One Event Type

**Technical Note**  
The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.

## Attending Out-of-Town Business Events Travel in Canada by Percent Taking At Least One Trip in Canada Last Two Years: Canada versus United States

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years

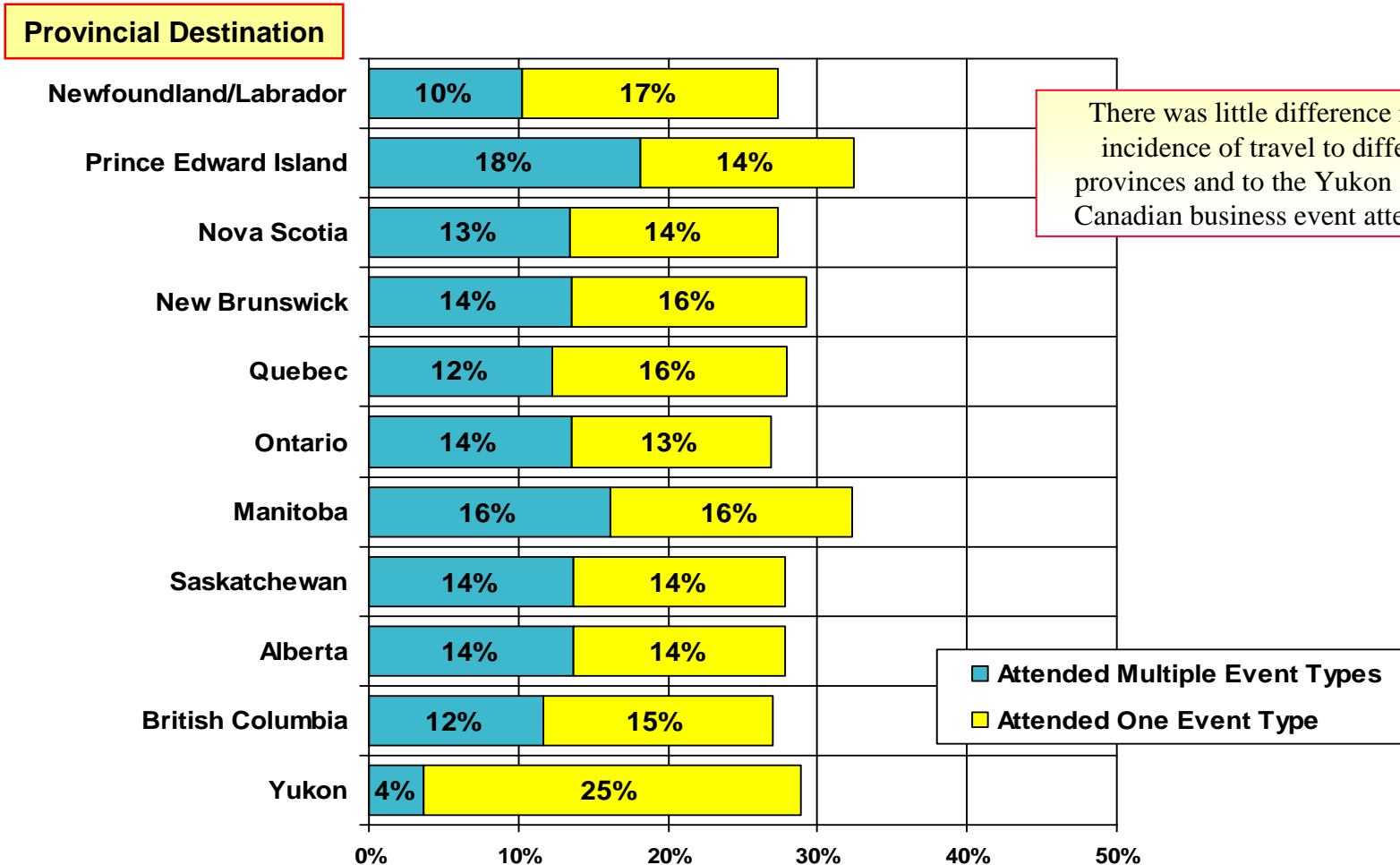


Out-of-town business event attendees were also more likely to have taken a trip in Canada during the last two years. One-quarter of Canadians who took a trip within Canada in the past two years also attended at least one business event, while only one-sixth who did not take a domestic trip reported attending an out-of-town business event. The difference among American travellers was even more dramatic. More than one-third of American travellers who visited Canada also attended at least one business event in the past two years compared to only one-quarter of those who did not visit Canada.

## Attending Out-of-Town Business Events

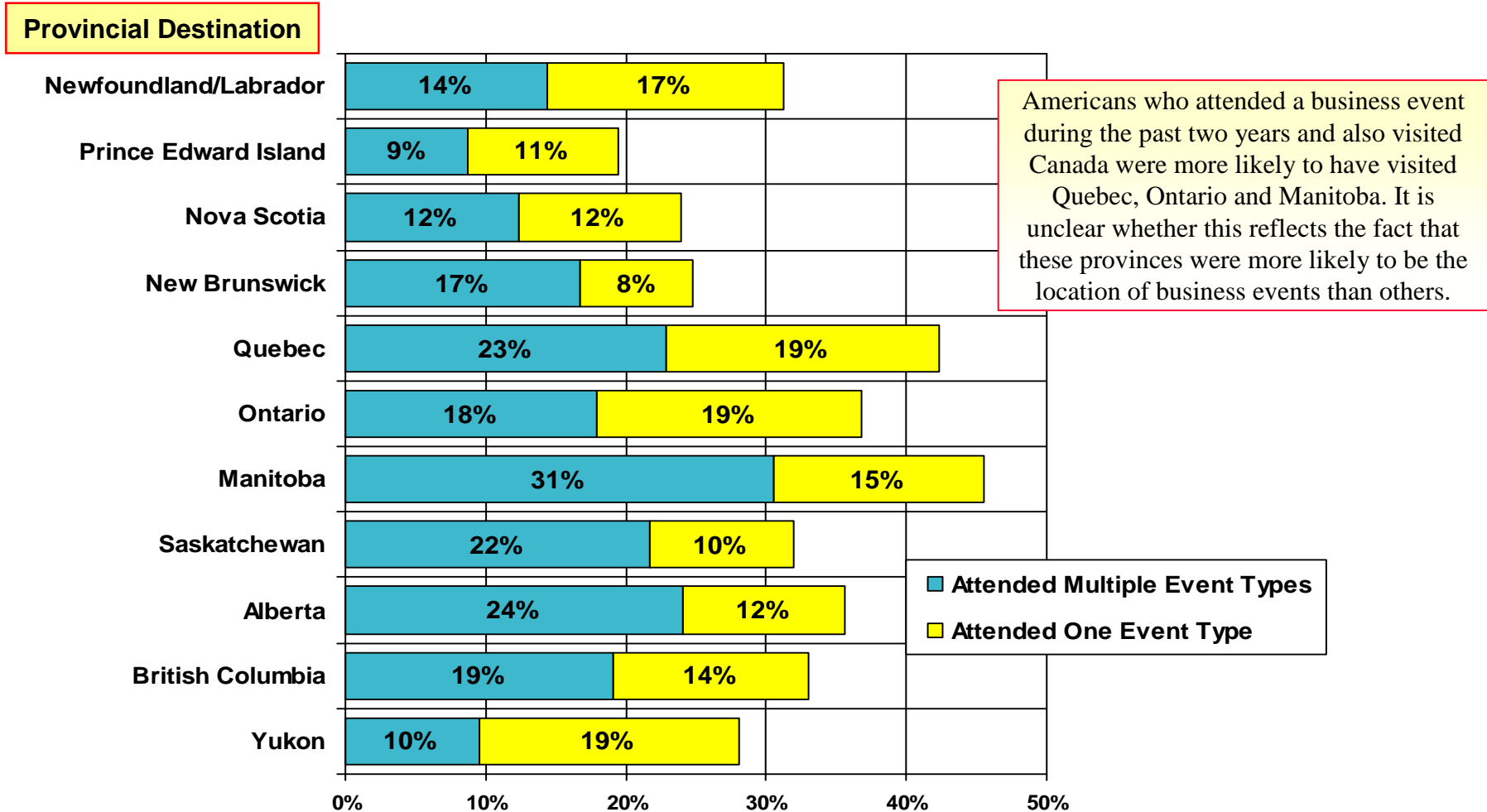
# Convention Attendance by Province Travelled To: Canada

Base: Percent of population (18 plus) who took at least one trip to a province during the last two years



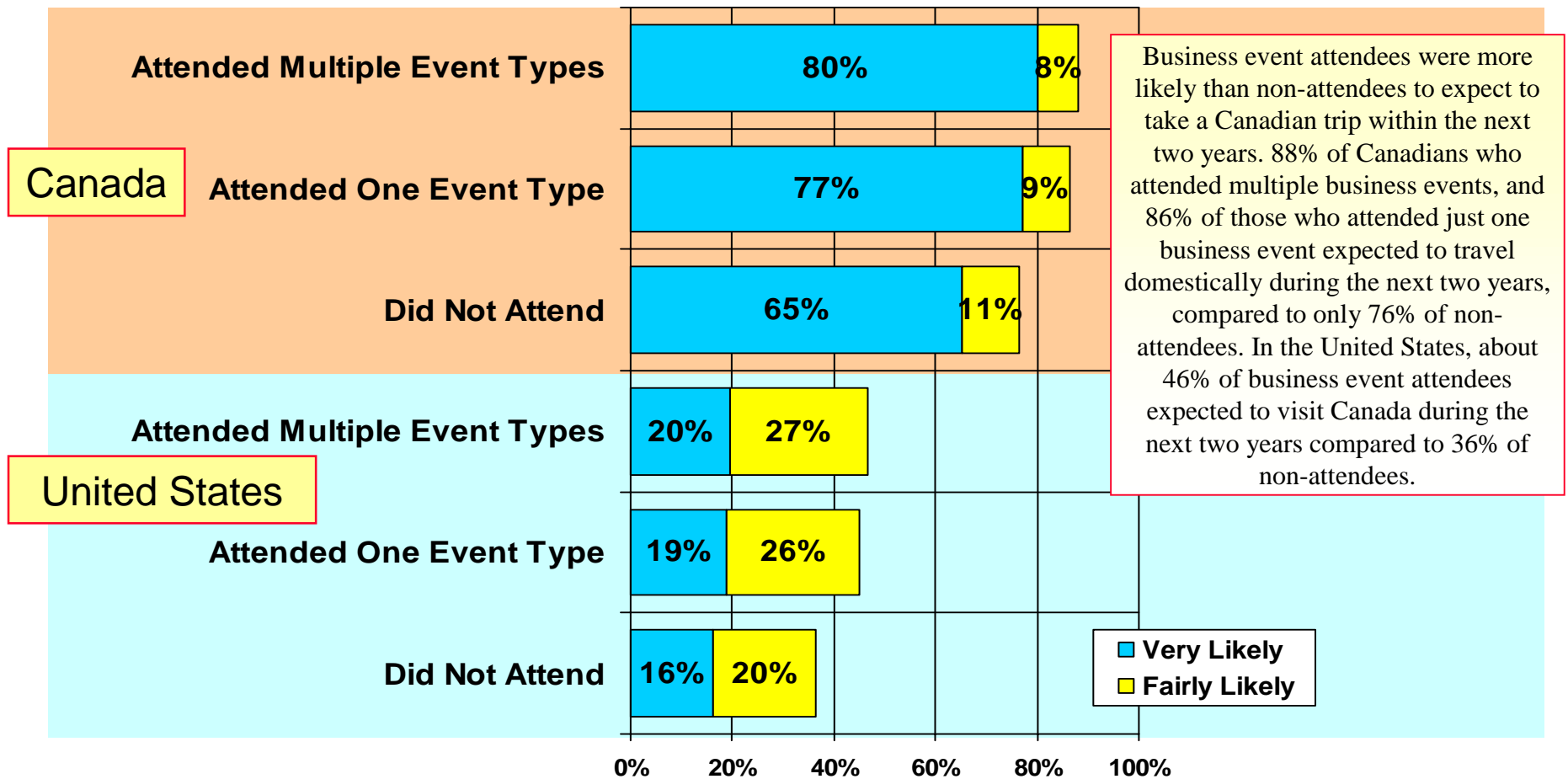
## Attending Out-of-Town Business Events Convention Attendance by Province Travelled To: United States

Base: Percent of population (18 plus) who took at least one trip to a province during the last two years



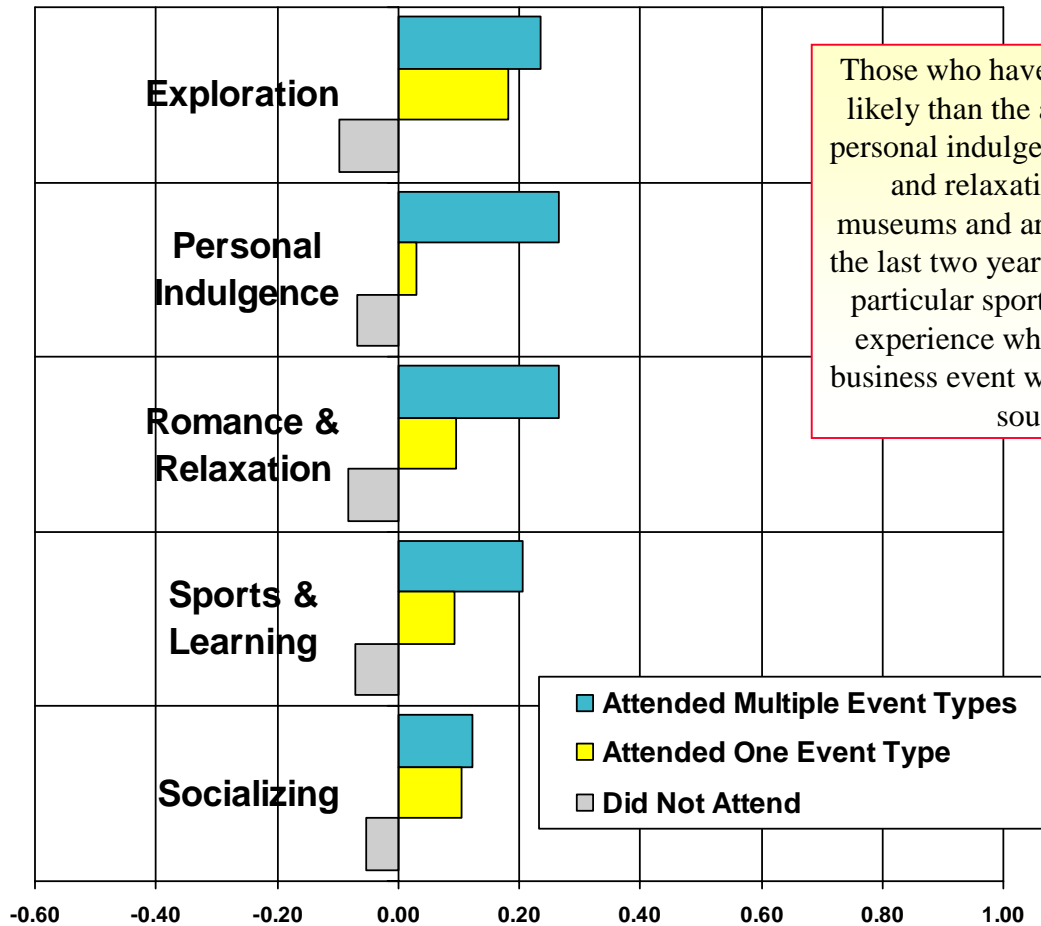
## Attending Out-of-Town Business Events Convention Attendance by Intentions to Travel in Canada during Next Two Years

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



## Attending Out-of-Town Business Events General Vacation Experiences Sought during Pleasure Travel in the Past Two Years

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)

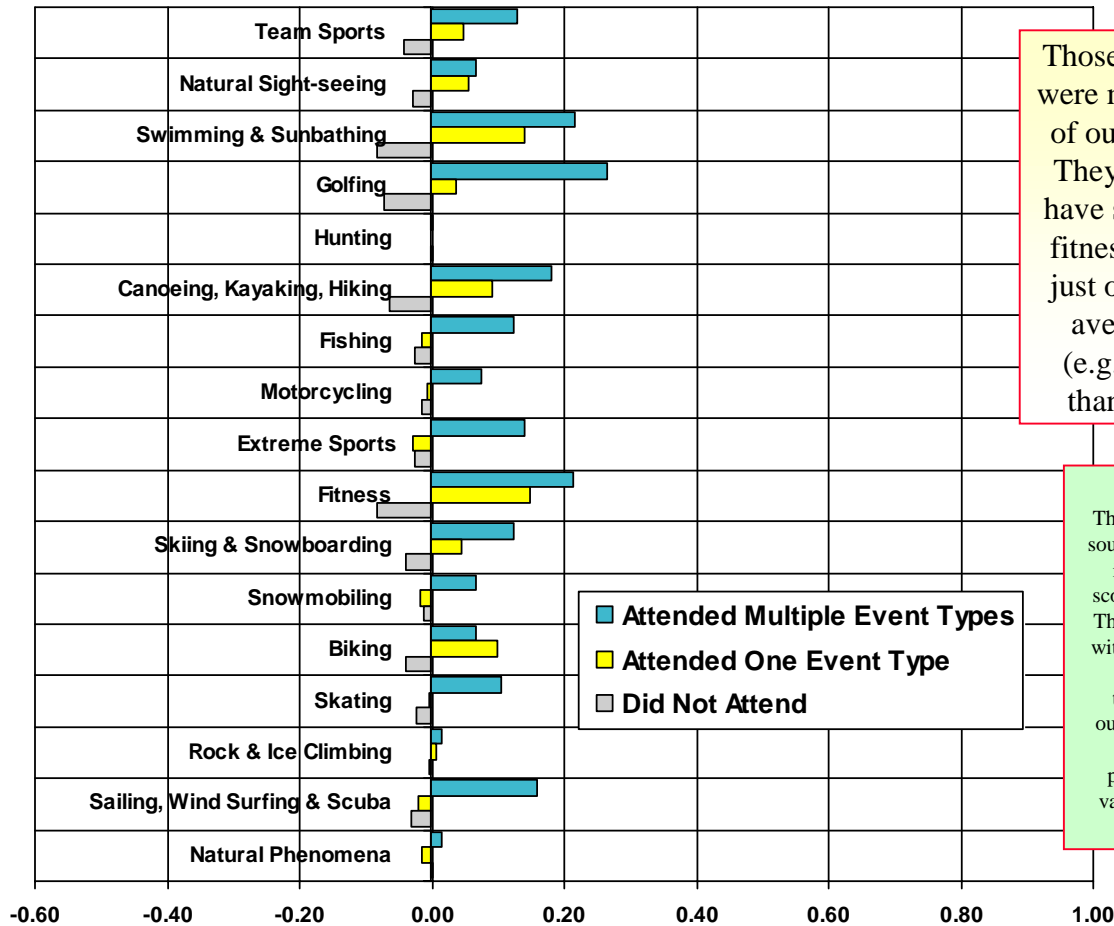


Those who have attended several types of business events were more likely than the average traveller to have sought out opportunities for personal indulgence (e.g., enjoying fine dining and nightlife), romance and relaxation, and exploration (e.g., visiting historical sites, museums and art galleries, natural wonders) while on vacation during the last two years. They were also more likely to have participated in a particular sport or hobby, or to have sought out a hands-on learning experience while on vacation. Those who attended just one type of business event were also more likely than the average traveller to have sought out exploratory vacation experiences.

**Technical Note**  
This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

## Attending Out-of-Town Business Events Outdoor Activities Sought during Pleasure Travel in the Past Two Years

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)

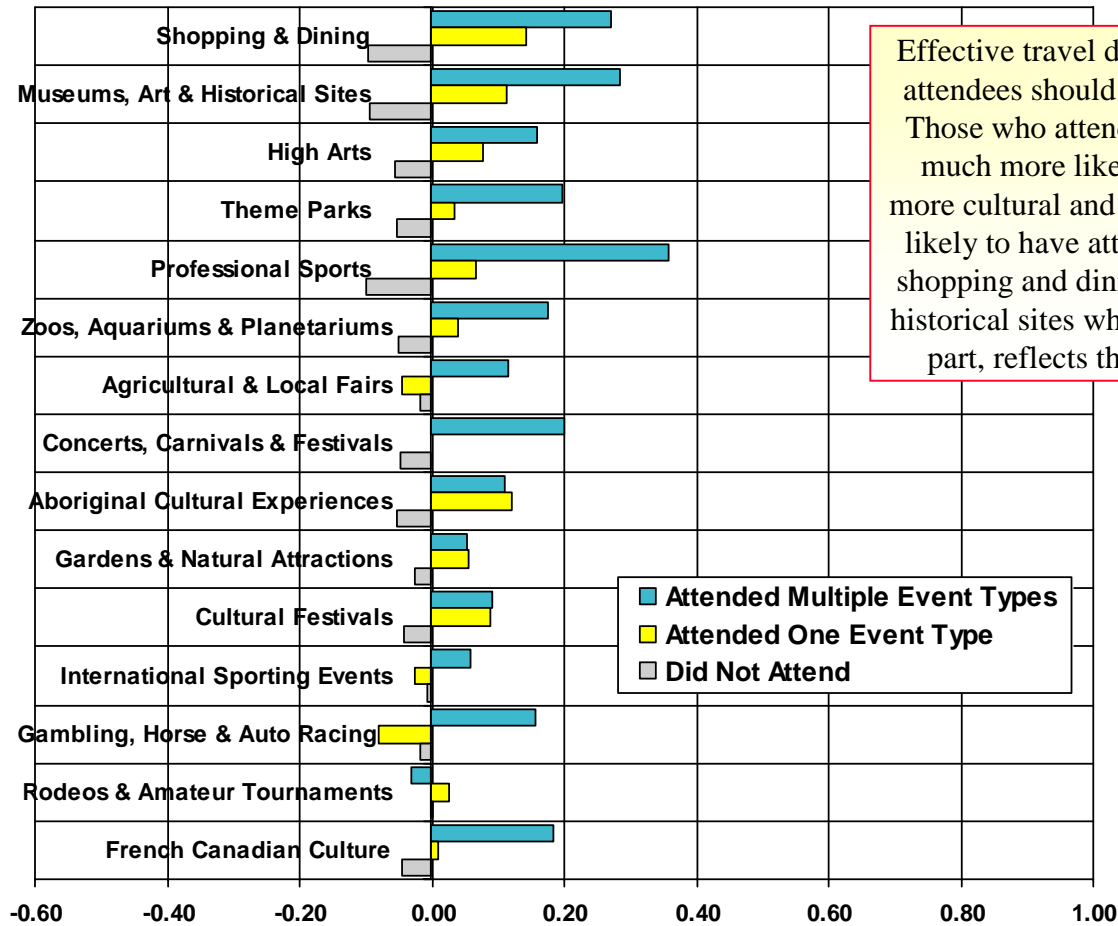


Those who attended multiple types of business events were more likely to have participated in a wide variety of outdoor activities relative to the average traveller. They were especially likely to have gone golfing, to have sunbathed and swam, or to have worked out in a fitness center or jogged outside. Those who attended just one type of business event also exhibited above-average participation in similar outdoor activities (e.g., swimming & sunbathing, fitness), but less so than those who attended multiple business events.

**Technical Note**  
This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given outdoor vacation activity type. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the outdoor vacation activity type. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the outdoor vacation activity type.

## Attending Out-of-Town Business Events Cultural and Entertainment Activities Sought during Pleasure Travel in the Past Two Years

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



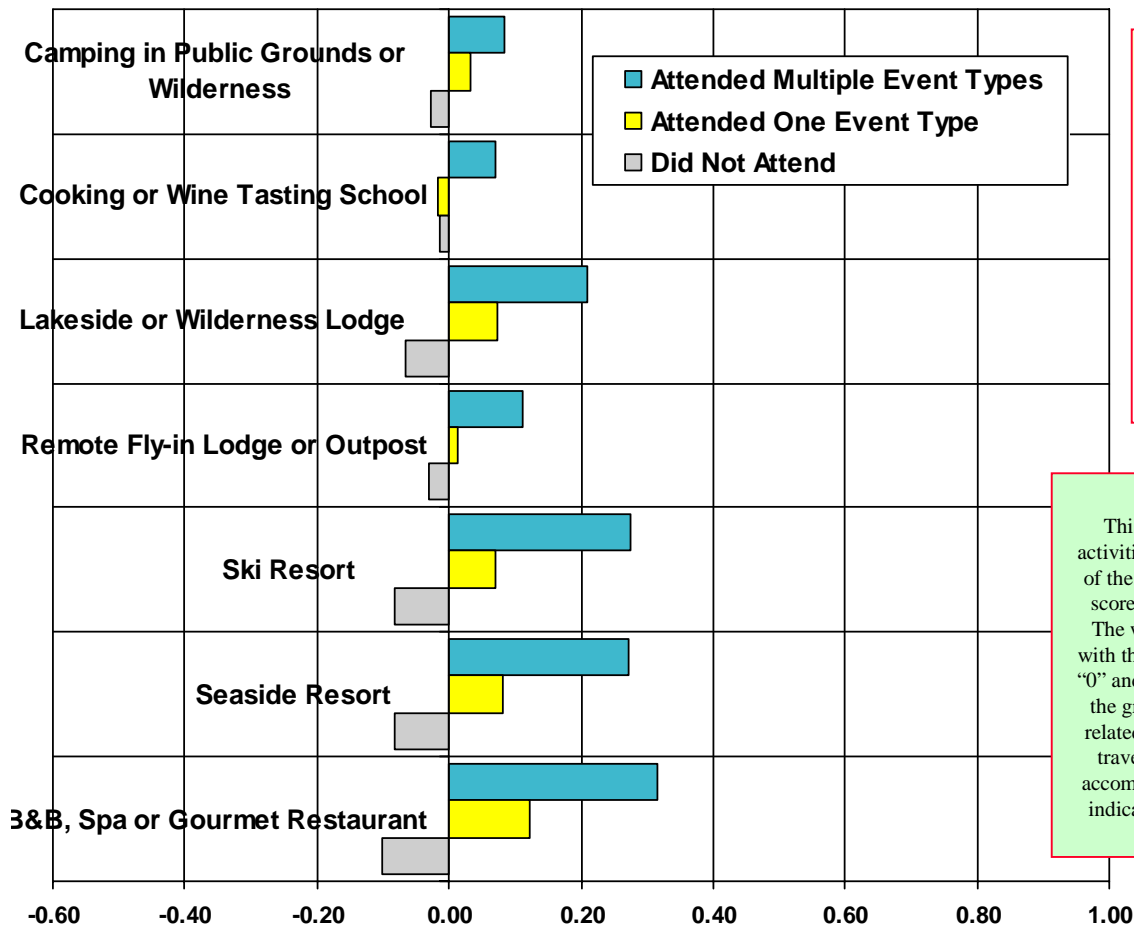
Effective travel destination promotion directed at business event attendees should highlight cultural and entertainment offerings. Those who attended two or more types of business events were much more likely than the average traveller to have attended more cultural and entertainment attractions. They were especially likely to have attended professional sports events, to have gone shopping and dining, and to have visited museums, galleries and historical sites while travelling during the past two years. This, in part, reflects the high affluence of business event attendees.

**Technical Note**

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given cultural and entertainment vacation activity type. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the cultural and entertainment activity type. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the cultural and entertainment activity type.

## Attending Out-of-Town Business Events Accommodation-related Activities Sought during Pleasure Travel in the Past Two Years

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)

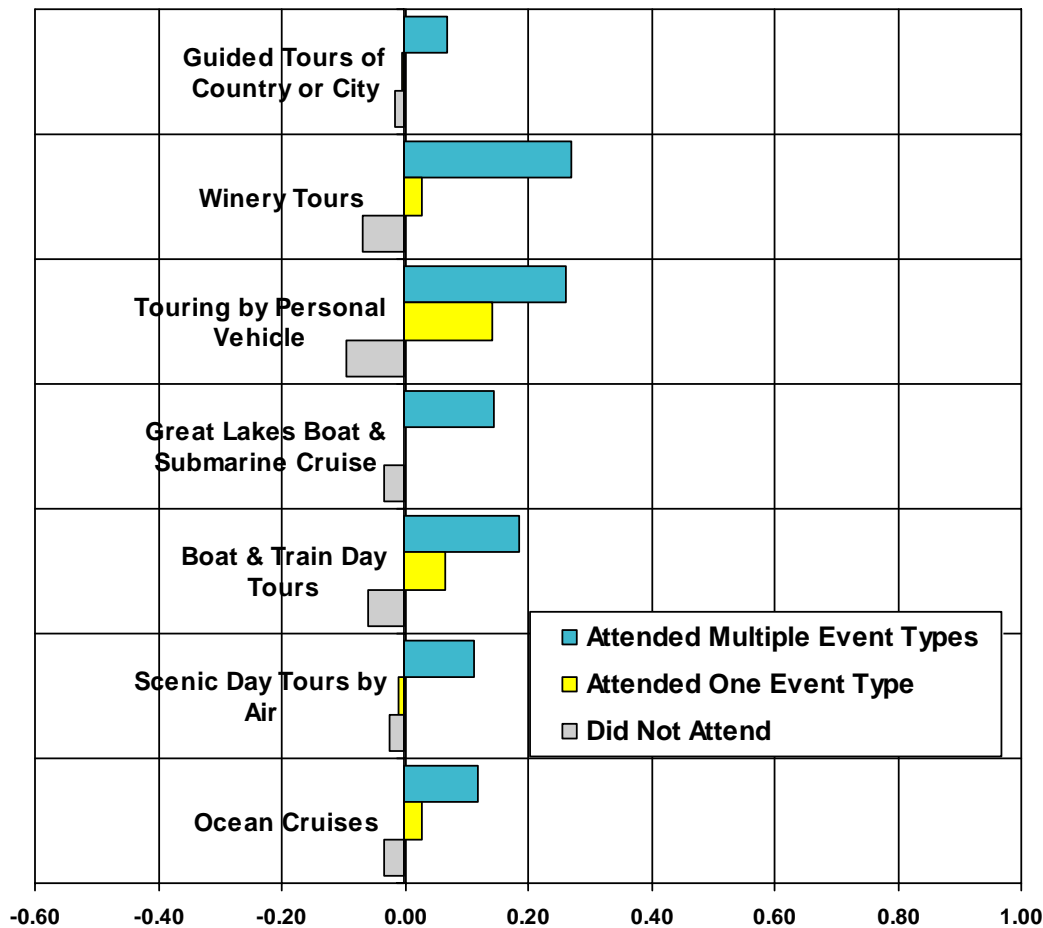


Travellers who attended two or more types of out-of-town business events were more likely to have stayed in luxury accommodations (e.g., ski and seaside resorts, B&B, spa or gourmet restaurant with accommodations, lakeside or wilderness lodges) than the average traveller during the past two years. However, they were no more likely to have stayed in natural settings (camping, remote lodge or outpost) than the average traveller.

**Technical Note**  
This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given accommodation-related vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the accommodation-related vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the accommodation-related vacation activity.

## Attending Out-of-Town Business Events Day and Overnight Touring Activities Sought in the Past Two Years

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



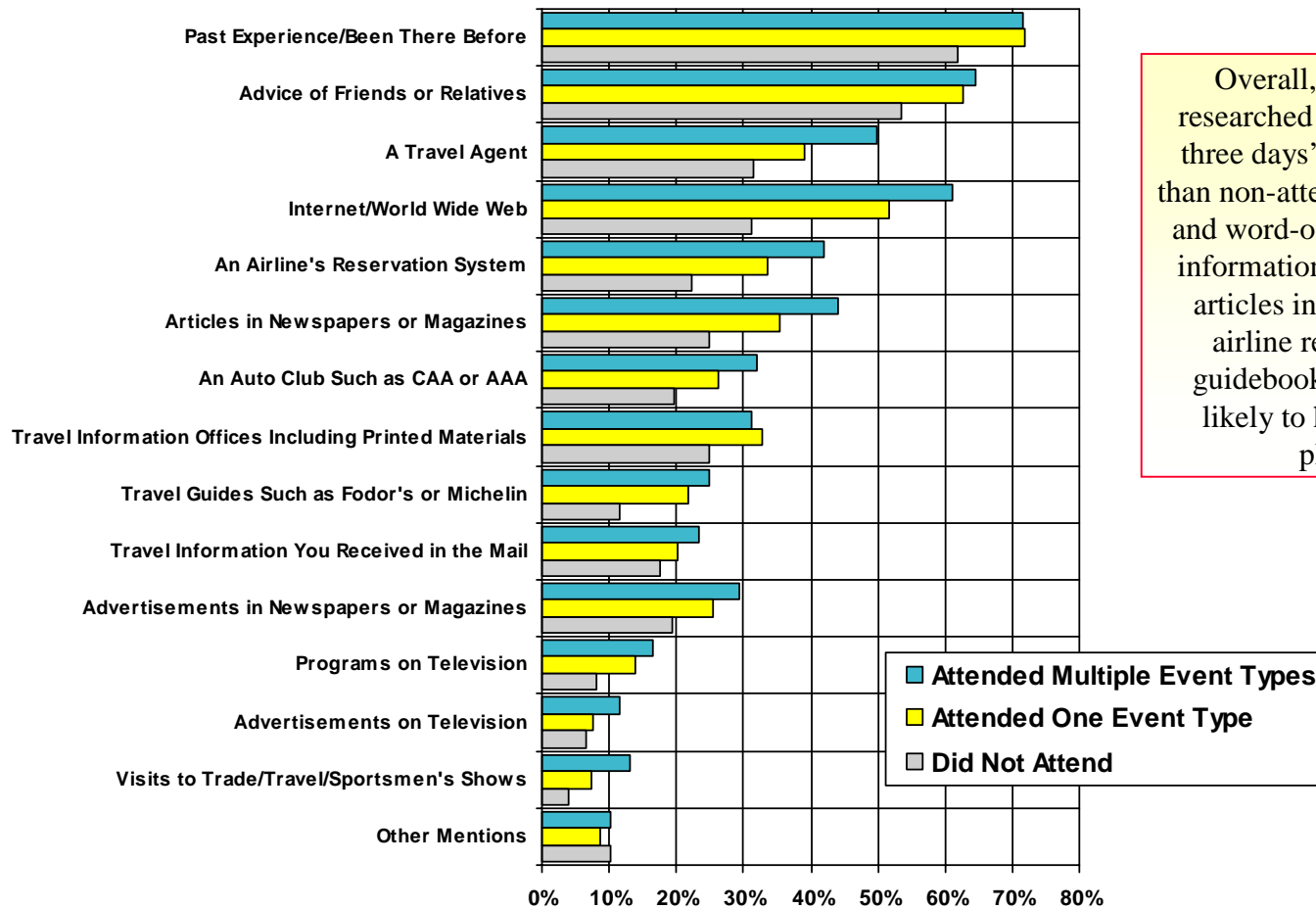
Participation in day and overnight touring activities while travelling generally increased as the level of attendance at out-of-town business events increased. Those who attended several types of out-of-town business events were much more likely than others to have taken wine tours, tours by boat or train, and to have toured using a personal vehicle. Those who attended just one type of business event also were more likely than average to have toured using their own vehicle.

**Technical Note**  
 This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to have participated in a given type of touring activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have participated in a given type of touring activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have participated in a given type of touring activity.

## Attending Out-of-Town Business Events

### Sources of Information Consulted to Plan Brief Vacations

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)

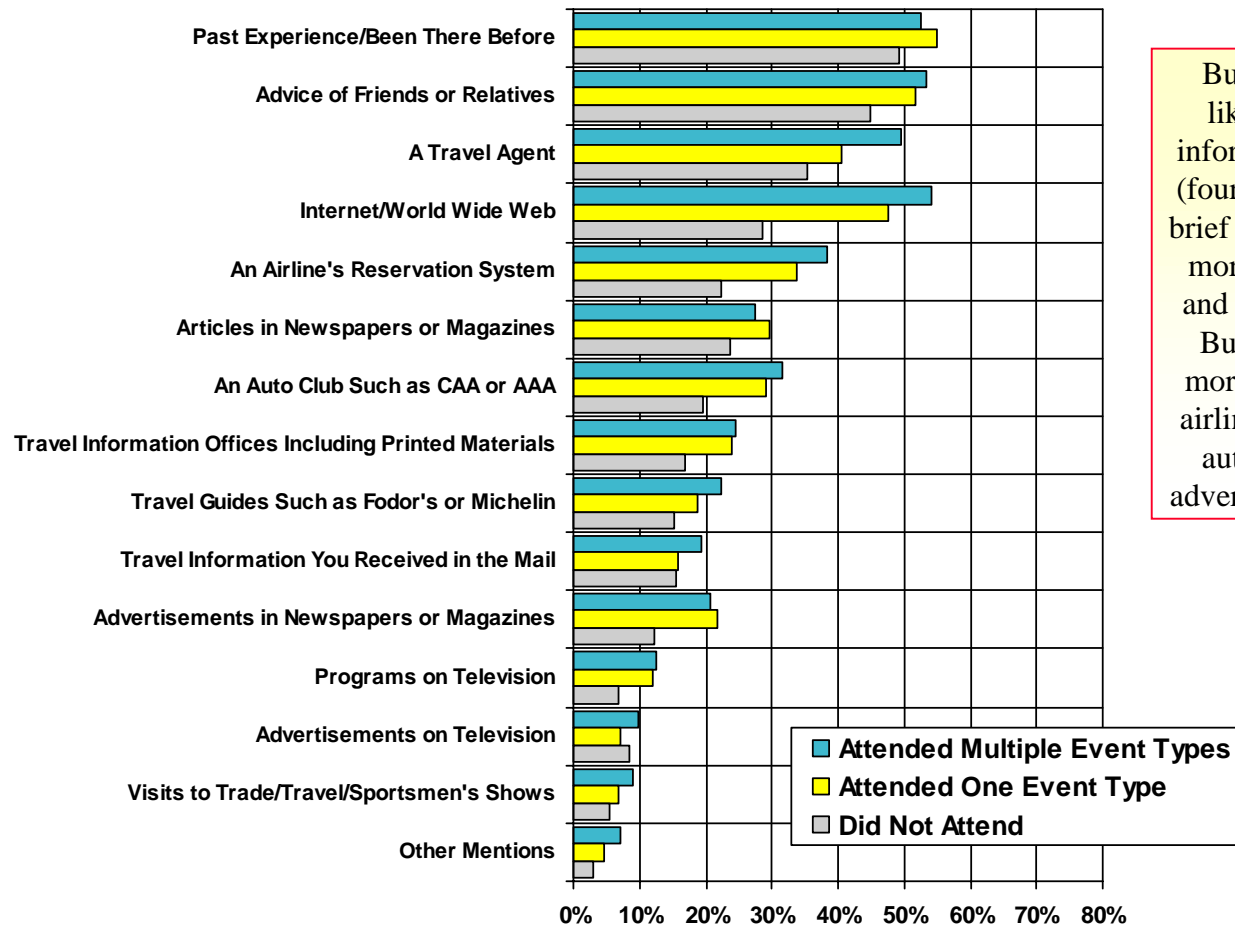


Overall, business event attendees researched their brief vacations (one to three days' duration) more extensively than non-attendees. While past experience and word-of-mouth were key sources of information, the Internet, travel agents, articles in newspapers or magazines, airline reservation systems, travel guidebooks and auto clubs were also likely to have been consulted when planning brief trips.

■ Attended Multiple Event Types  
■ Attended One Event Type  
■ Did Not Attend

## Attending Out-of-Town Business Events Sources of Information Consulted to Plan Longer Vacations

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



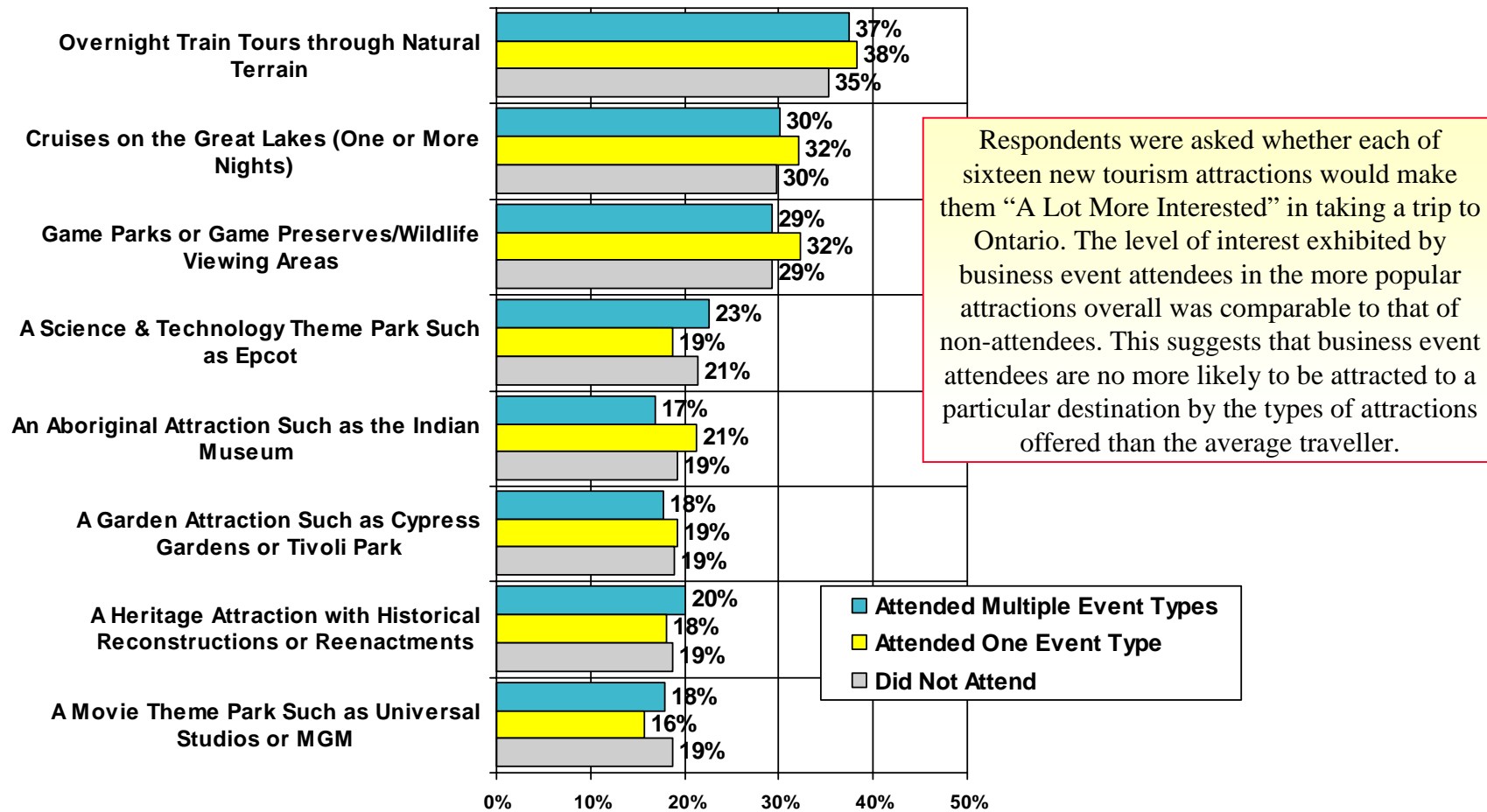
Business event attendees were also more likely to have consulted a wide range of information sources to plan their longer trips (four days or more). However, in contrast to brief vacations, business event attendees were more likely to have consulted travel agents and the Internet when planning longer trips. Business event attendees also were much more likely than others to have relied on an airline reservation system, information from auto clubs, and newspaper and magazine advertisements to help them plan longer trips.

## Attending Out-of-Town Business Events

### Interest in New Tourism Products (Part One of Two)

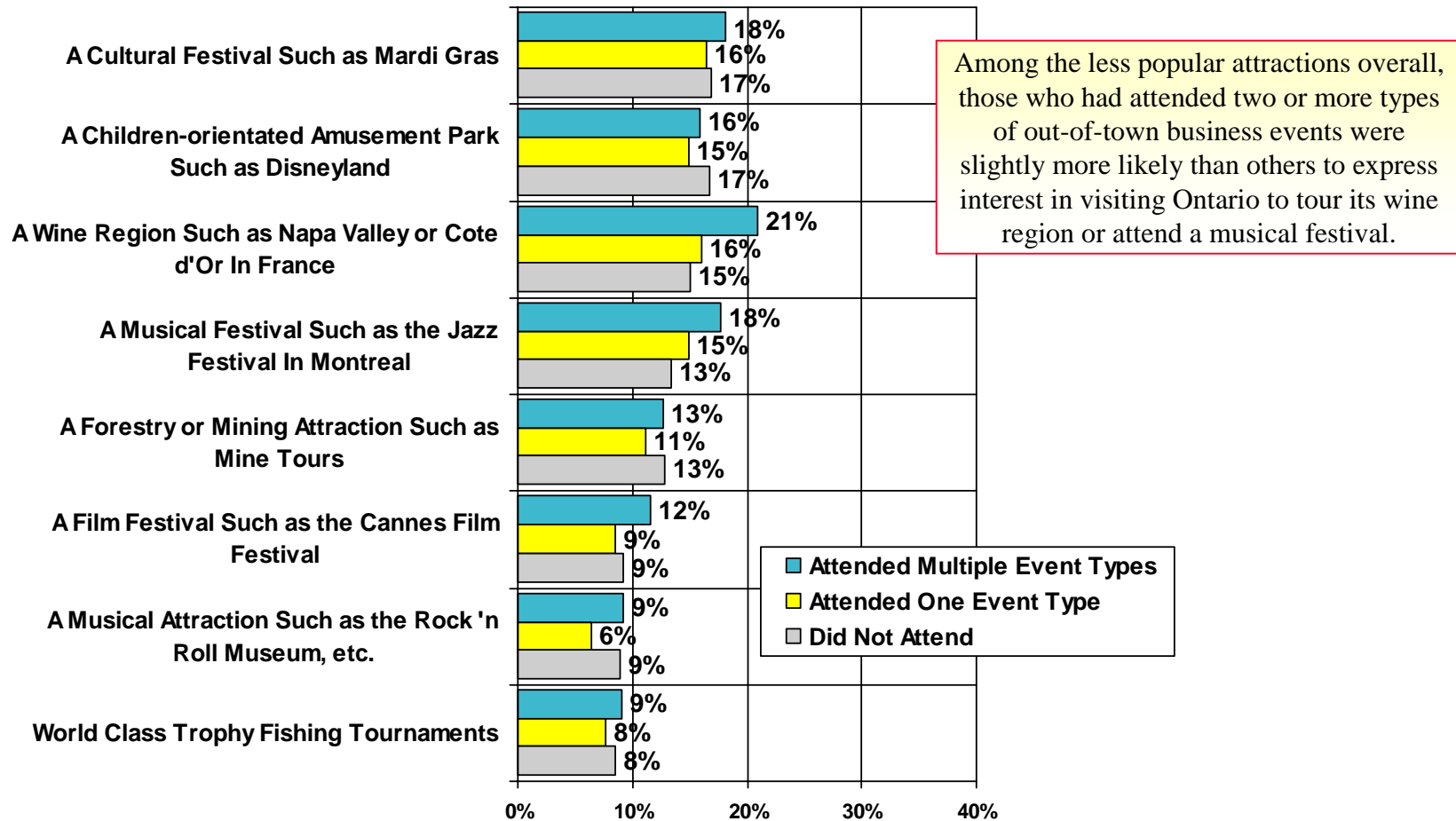
Percent Stating Attraction Would Make Them “A Lot More Interested” in Taking a Trip to Ontario

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



## Attending Out-of-Town Business Events Interest in New Tourism Products (Part Two of Two)

Percent Stating Attraction Would Make Them “A Lot More Interested” in Taking a Trip to Ontario  
Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)

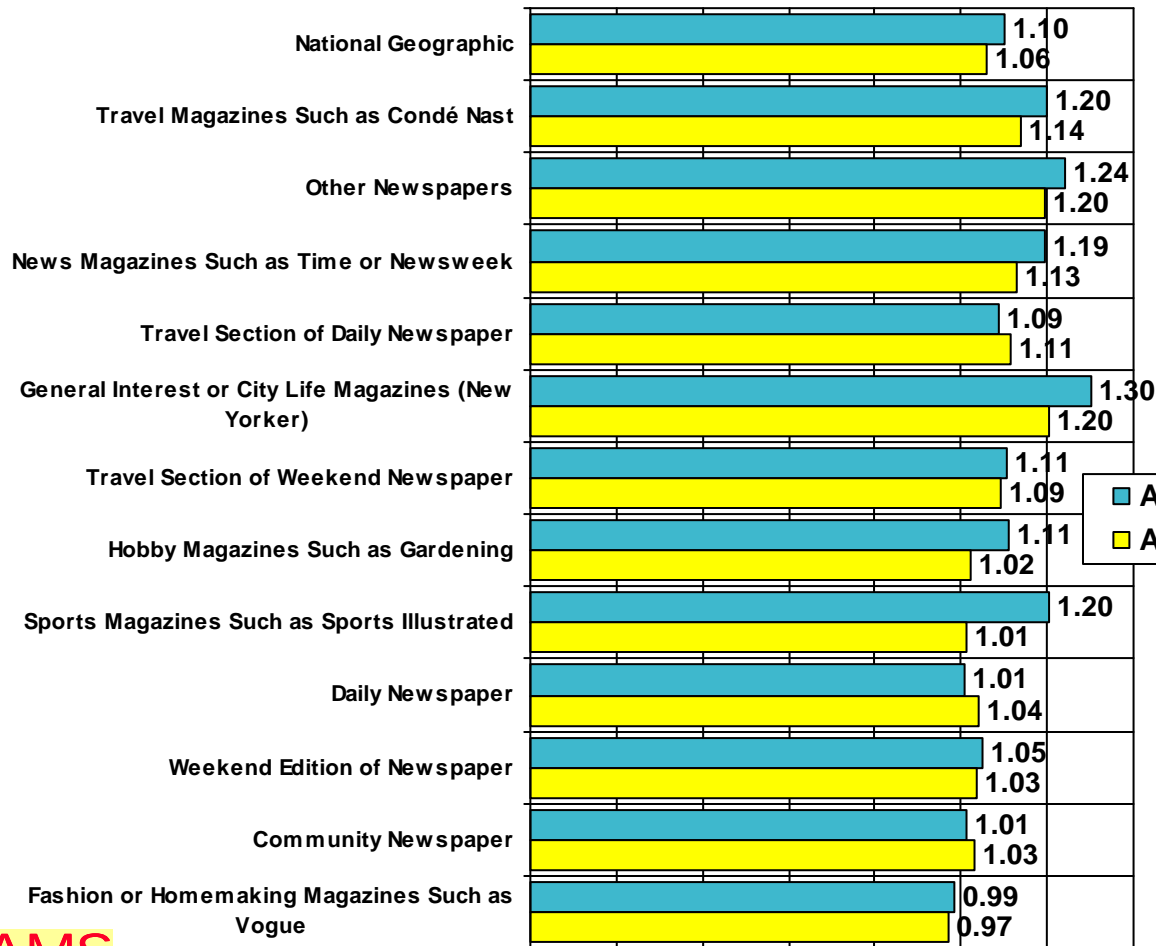


## Attending Out-of-Town Business Events

### Media Index for Print Media: Canada & United States

Percent Reading Each Type of Publication in General Market  
among Those Attending One or More Event Types

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



Media indexing for types of print media (see Technical Note below) suggests that business event attendees can be best reached through general interest or city life magazines (e.g., New Yorker or Harper's), travel magazines (e.g., Travel and Leisure, National Geographic), and sports magazines and news magazines (such as Time).

■ Attended Multiple Event Types  
 ■ Attended One Event Type

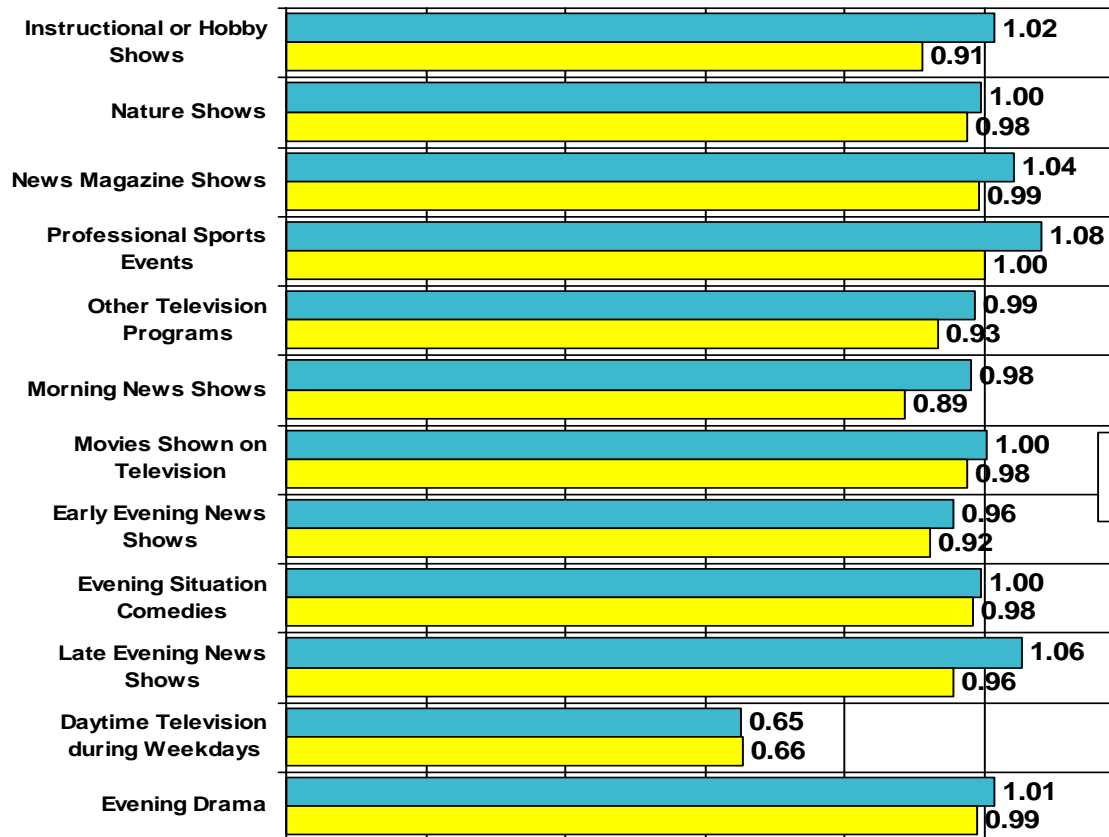
**Technical Note**  
 The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that out-of-town convention attendees were 20% more likely to read a particular publication than the general adult population.

## Attending Out-of-Town Business Events

# Media Index for Television Programs: Canada & United States

### Percent Watching Each Type of Television Program in General Market among Those Attending One or More Event Types

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



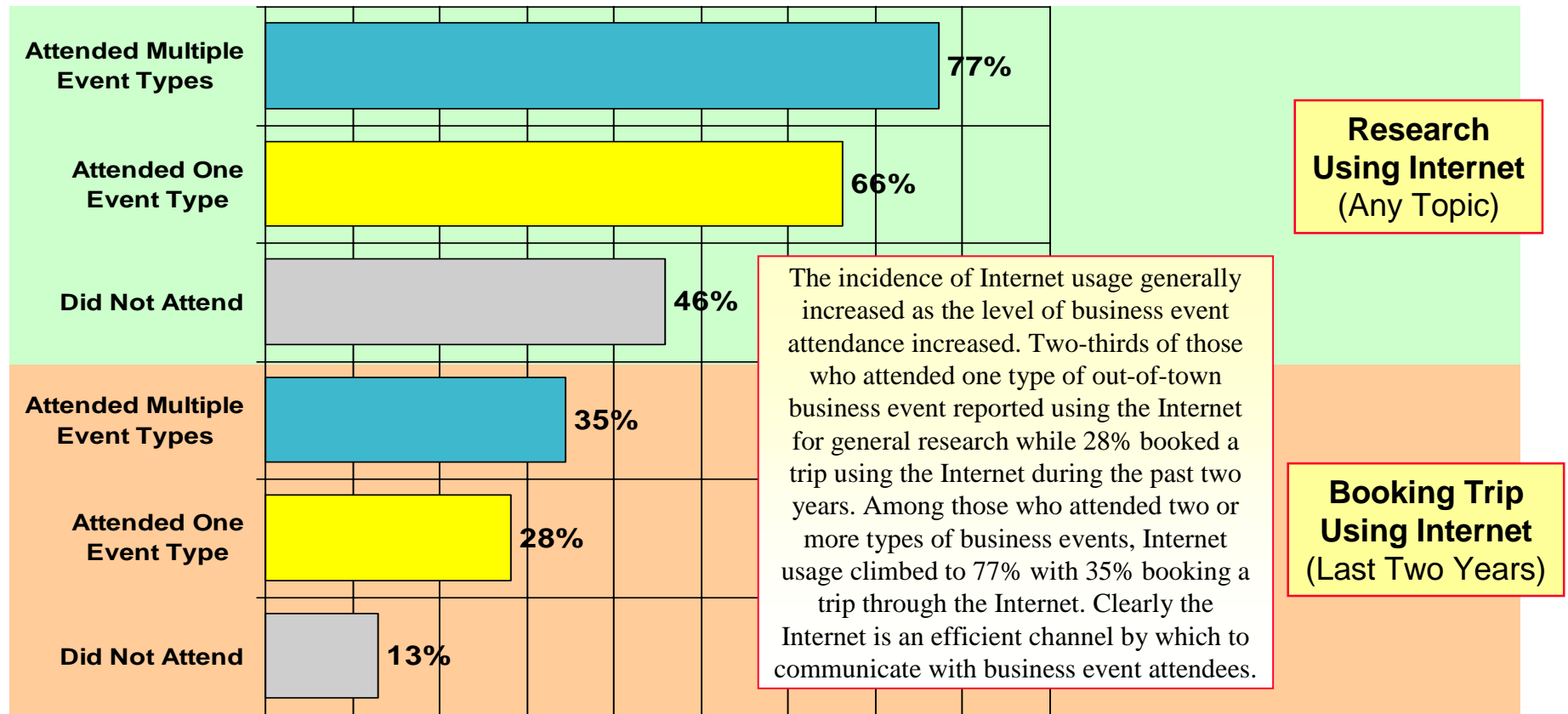
Television does not appear to be a very efficient channel by which to target business event attendees. Business event attendees were no more likely than the average traveller to watch most types of television programming. Moreover, because those who attend business events were employed full-time, they were especially unlikely to watch daytime television during the weekdays.

■ Attended Multiple Event Types  
■ Attended One Event Type

**Technical Note**  
The Media Index is computed by dividing the percent within each segment routinely viewing each program type by the percent in the total market who routinely views each program type. A score of 1.0 means that viewership is the same as the total market. Index values above 1.0 indicate that the viewership is above average while index values below 1.0 indicate that viewership is below average. For example, an index value of 1.2 means that out-of-town convention attendees were 20% more likely to watch a particular program type than the general adult population.

## Attending Out-of-Town Business Events By Percent of Internet Usage to Research or Book At Least One Trip

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



# Destination Image Mapping

## - Technical Explanation -

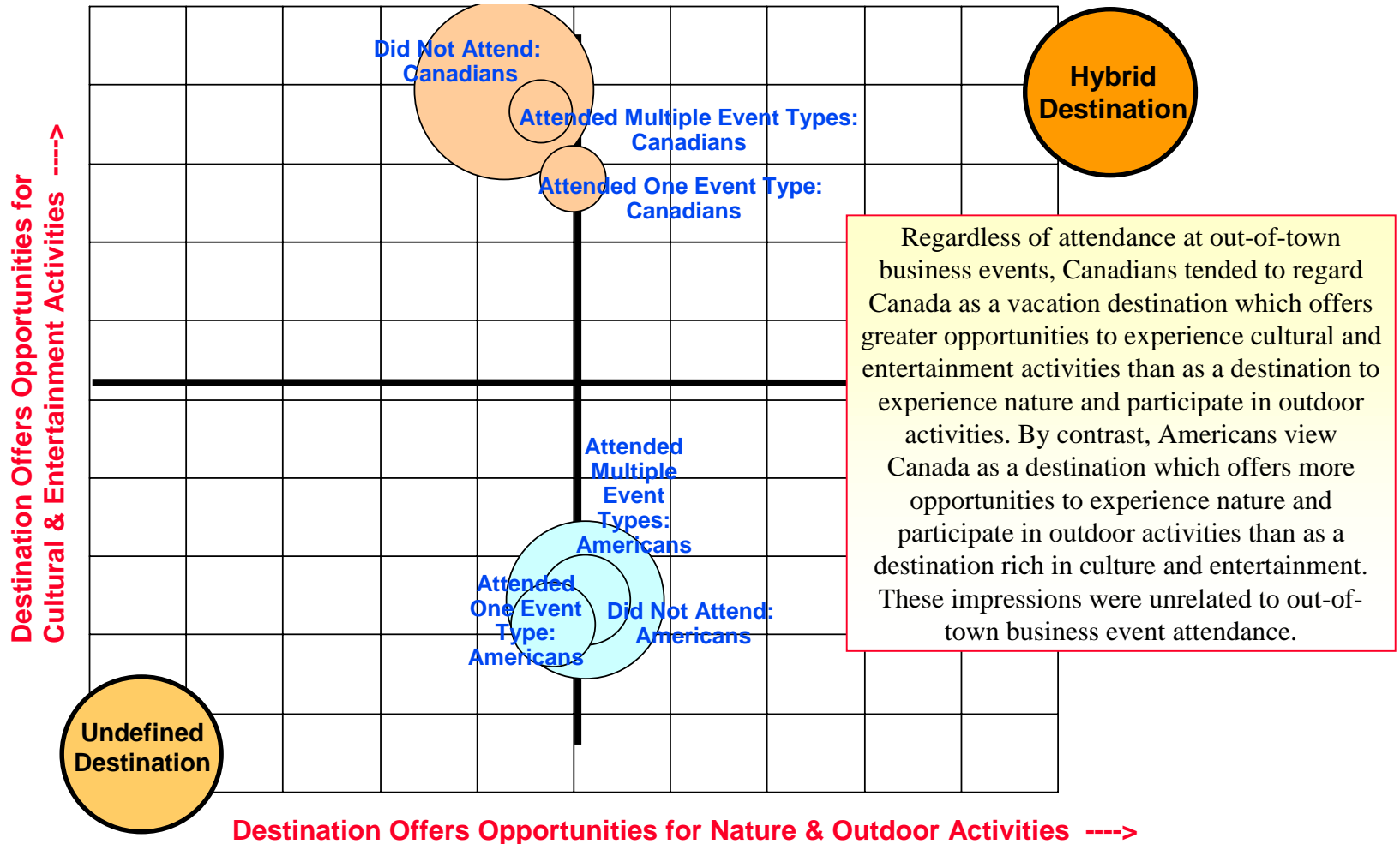
Respondents were asked to assess the image of Canada and Ontario on a ten-point rating scale for 25 image attributes. These ratings were factor analyzed to identify general image dimensions upon which Canada and Ontario were evaluated (see Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellent opportunities to experience cultural and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature or participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and cultural/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.



## Attending Out-of-Town Business Events

# Canadian Vacation Imagery: Canada and United States

Base: Total population (18 plus) who took a trip in the last two years and able to rate Canada on one plus attributes, Canada & U.S. (mailback survey). Circle size denotes size of the market

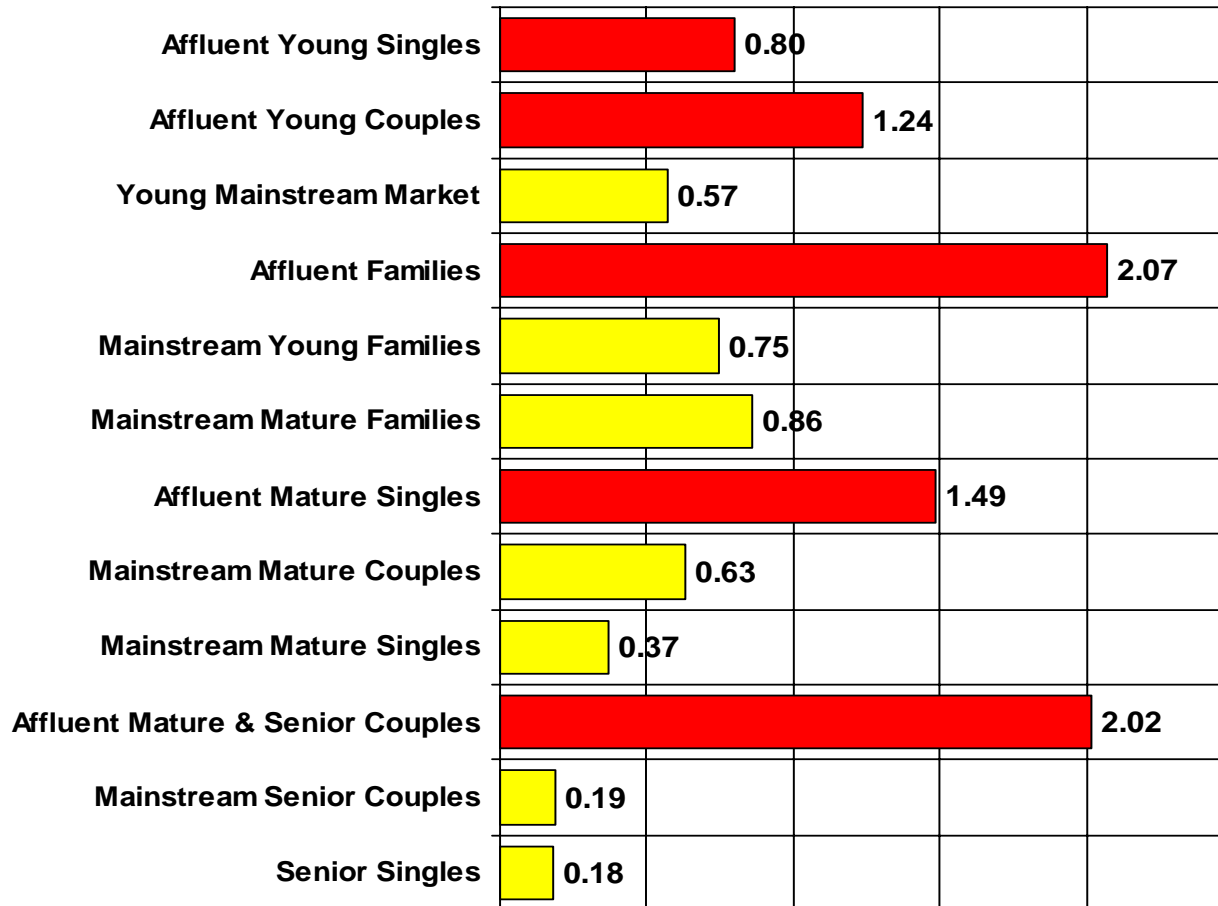




## Attending Out-of-Town Business Events Overall Market Potential: Canada

### Business Event Attendance by Likelihood of Travel within Canada (Indexed)

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



The Overall Market Potential Index is constructed to identify those segments which were most likely to be responsive to marketing, advertising and promotional initiatives directed at people who attend out-of-town conferences, conventions, tradeshow, seminars. This Index indicates that, in Canada, four of the five affluent segments were clearly the main targets for such initiatives. Affluent Families and Affluent Mature and Senior Couples exhibit particular potential for this type of promotional activity although Affluent Young Couples and Affluent Mature Singles represent important secondary markets.

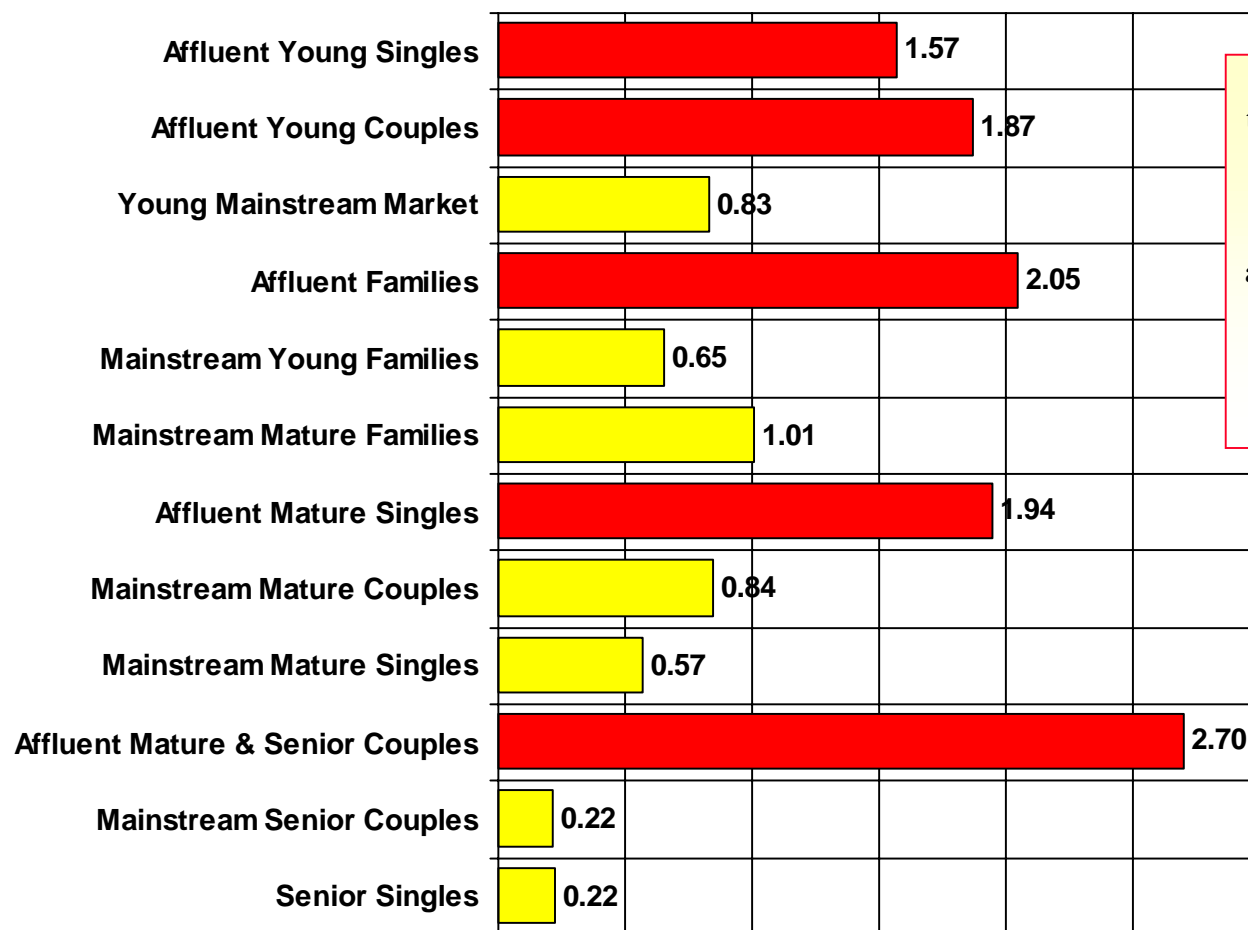
#### Technical Note

The Overall Market Potential Index is computed by multiplying the percent who attended out-of-town conventions and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below 1.0 reflect below average market potential.

## Attending Out-of-Town Business Events Overall Market Potential: United States

### Business Event Attendance by Likelihood of Travel to Canada (Indexed)

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



The Overall Market Potential Index for the United States reveals a similar pattern to that observed for Canada in that the affluent segments are clearly the main targets for business event promotional activities. However, in contrast to Canada the Affluent Young Singles were also found to be among the prime markets. This market exhibits below average potential in Canada.

**Technical Note**  
The Overall Market Potential Index is computed by multiplying the percent who attended out-of-town conventions and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below 1.0 reflect below average market potential.