

CANADIAN TRAVEL MARKET

Visiting Spas While on Trips Of One or More Nights

A Profile Report

November 24, 2007

Prepared by Lang Research Inc. on behalf of:

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



Visiting Spas While on Trips

Executive Summary

Over the last two years, 7.5% (1,852,711) of adult Canadians visited a health and wellness spa while on an out-of-town, overnight trip of one or more nights. Visiting a spa while on trips was the 17th most frequent culture and entertainment activity type undertaken by Canadian Pleasure Travellers in the past two years. Of those who visited health and wellness spas, 31.0% (574,972) reported that this activity was the main reason for taking at least one trip.

Relative to the average Canadian Pleasure Traveller, Spa Visitors are predominantly female (63.1) and over-represented among Mature Couples. Spa Visitors were the 3rd most likely to have a university degree (42.6%) and they have the highest household income (\$85,105) of the 21 culture and entertainment activity types. They are highly over-represented in Saskatchewan, and, to lesser extent, British Columbia and Quebec.

Spa Visitors are frequent out-of-country travellers. They were the 5th most likely of the 21 culture and entertainment activity types to have visited the United States (64.6%), the most likely activity segment to have visited Mexico (24.5%), the second most likely to have taken a trip to the Caribbean (28.0%) and the 5th most likely to have traveled overseas (35.8%) in the last two years. They were also the 4th most likely to have taken a trip within their own province or region (92.5%), the 11th most likely to have traveled to an adjacent province or region (56.5%) and the 6th most likely to have visited a non-adjacent province or region (35.8%) in the past two years. They are especially over-represented among travellers in the Western Provinces and Northern Territories.

Spa Visitors were extremely active in both outdoor activities and in culture and entertainment activities while on trips. They frequently exercise and jog while on trips and much more likely than the average Canadian Pleasure Traveller to participate in strenuous winter activities (e.g., cross-country skiing and snowshoeing, downhill skiing) and summer sports (e.g., golf, tennis). They also frequently attend live art performances (e.g., live theatre, high arts, comedy clubs and festivals) while traveling and exhibit particular interest in fine cruise (e.g., wine, beer & food tastings, inn or resort with gourmet dining). Spa Visitors usually take luxury resort vacations that are relaxing and pampering and that offer novelty, intellectual stimulation and physical challenge.

Spa Visitors are the most likely of the 21 culture and entertainment types to use the Internet to plan (76.8%) and book (53.7%) travel. They are also among the heaviest users of travel media. They may also be effectively targeted through health and wellness magazines and websites, 'better living' programming (e.g., cooking shows on television), city lifestyle magazines and fashion and beauty magazines.

Travel Activity and Motivation Survey (TAMS)

The TAMS survey examines the recreational activities and travel habits of Canadians and Americans. The survey examines out-of-town, overnight travel behaviour of one or more nights over the past two years and provides detailed information on Travellers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

TAMS represents a comprehensive assessment of travel behaviour and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada. In particular, TAMS was designed to:

- Identify existing and potential tourism markets;
- Measure the likelihood of these tourism markets being attracted to vacation experiences in Canada;
- Create packaging opportunities for each of these markets;
- Determine how to reach these markets (i.e., in terms of media strategies); and
- Provide information on how to fine-tune and target existing marketing campaigns.

TAMS was sponsored by the following organizations:

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

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

The Canadian database is used in this current report. This survey was conducted by Statistics Canada. 31,699 completed questionnaires were returned. The data have been weighted to project the results to the Canadian population.

This report profiles persons who visited a spa while on a trip and compares them with other Canadian Pleasure Travellers (i.e., those who took at least one pleasure trip or vacation in the last two years). This report is part of a series of 44 Activity Reports prepared using the Canadian TAMS database.

Visiting Spas While on Trips

Market Incidence

Over the last two years, 7.5% of adult Canadians (1,852,711) visited a health and wellness spa while on an out-of-town, overnight trip of one or more nights. Visiting a spa while on trips was the 17th most frequent culture and entertainment activity type undertaken by Canadian Pleasure Travellers in the past two years. Of those who visited a spa, 31.0% (574,972) reported that this activity was the main reason for taking at least one trip in the past two years.

Fig. 1 Incidence of Visiting Spas While on Trips¹

	Number of Spa Visitors ²	Percent Main Reason for Trip ³	Percent of Pleasure Travellers ⁴	Percent of Total Canadian Population ⁵
Size of Market	1,852,711	574,972	18,439,508	24,776,103
Day visit to a health & wellness spa on an overnight trip	1,852,711	31.0%	10.0%	7.5%

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

Incidence by Region

Spa Visitors are over-represented among Canadian Pleasure Travellers living in Saskatchewan, and, to a lesser extent, Quebec and British Columbia. They are least likely to live in the Atlantic Provinces.

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

	Total Population	Estimated Number Who Visited a Spa on a Trip	Percent of Pleasure Travellers in Region Who Visited a Spa on a Trip	Percent of Total Regional Population Who Visited a Spa on a Trip
Canada	24,776,103	1,852,711	10.0%	7.5%
Atlantic Provinces	1,822,494	63,706	5.0%	3.5%
Quebec	5,940,869	490,430	11.7%	8.3%
Ontario	9,671,592	673,067	9.4%	7.0%
Manitoba	843,107	51,846	8.7%	6.1%
Saskatchewan	706,325	96,162	17.8%	13.6%
Alberta	2,465,540	167,160	8.3%	6.8%
British Columbia	3,326,176	310,340	11.7%	9.3%

Demographic Profile

Spa Visitors are more likely to be female (63.1%) than any other culture and entertainment activity type. They are over-represented among those 25 to 54 years of age and especially among Mature Couples. Spa Visitors are also the most affluent of the 21 culture and entertainment activities. They were the 3rd most likely to have a university degree (42.6%) and they have the highest household income (\$85,105) of the 21 culture and entertainment activity types.

Fig. 3 Demographic Profile of Spa Visitors Relative to All Canadian Pleasure Travellers

		Visited a Spa	Did Not Visit a Spa ¹	Pleasure Travellers	Index ²
Attribute	Size of Market	1,852,711	16,586,798	18,439,508	100
Gender	Male	36.9%	50.2%	48.8%	76
	Female	63.1%	49.8%	51.2%	123
Age of Respondent	18 to 24	9.5%	13.2%	12.8%	74
	25 to 34	22.8%	18.9%	19.3%	118
	35 to 44	24.5%	20.1%	20.5%	119
	45 to 54	24.1%	19.9%	20.3%	118
	55 to 64	12.5%	14.3%	14.1%	89
	65 Plus	6.7%	13.6%	12.9%	52
Average Age		42.7	44.7	44.5	N/A
Marital Status	Not married	29.1%	32.6%	32.2%	90
	Married	70.9%	67.4%	67.8%	105
Parental Status	No children under 18	67.8%	71.5%	71.1%	95
	Children under 18	32.2%	28.5%	28.9%	111
Education	High school or less	23.9%	37.6%	36.2%	66
	Some post-secondary	9.9%	11.3%	11.2%	88
	Post-secondary diploma/certificate	23.6%	21.7%	21.9%	108
	University degree	42.6%	29.4%	30.7%	139
Household Income	Under \$20,000	2.8%	6.0%	5.7%	49
	\$20,000 to \$39,999	9.8%	15.0%	14.5%	67
	\$40,000 to \$59,999	13.1%	16.9%	16.5%	79
	\$60,000 to \$79,999	14.7%	15.3%	15.2%	96
	\$80,000 to \$99,999	12.7%	12.2%	12.2%	104
	\$100,000 or more	34.2%	21.5%	22.8%	150
	Not stated	12.8%	13.0%	13.0%	99
Average Household Income		\$85,105	\$71,455	\$72,829	N/A

- 1 - Those who "Did Not Visit a Spa" are defined as individuals who took at least one out-of-town, overnight pleasure trip of one or more nights in the last two years but did not visit a spa on any trip. The numbers of Spa Visitors and Non-Spa Visitors equal the number of Pleasure Travellers.
- 2 - The "Index" is calculated by dividing the percent for Spa Visitors in each group by the percent of Pleasure Travellers in each group. The Index indicates the extent to which Spa Visitors are over or under-represented relative to the average Pleasure Traveller. An index of 100 means the percent participating in the activity is the same as that of the average Canadian Pleasure Traveller. Index values over 100 indicate that those participating in the activity are over-represented relative to the average Canadian Pleasure Traveller. Index values less than 100 indicate that those participating in the activity are under-represented relative to the average Canadian Pleasure Traveller.

Travel Activity (During Last Two Years)

Spa Visitors are frequent out-of-country travellers. They were the 5th most likely of the 21 culture and entertainment activity types to have visited the United States (64.6%), the most likely activity segment to have visited Mexico (24.5%), the second most likely to have taken a trip to the Caribbean (28.0%) and the 5th most likely to have traveled overseas (35.8%) in the last two years.

They were also the 4th most likely to have taken a trip within their own province or region (92.5%), the 11th most likely to have traveled to an adjacent province or region (56.5%) and the 6th most likely to have visited a non-adjacent province or region (35.8%) in the past two years. They are especially over-represented among travellers in the Western Provinces and Northern Territories.

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

	Spa Visitors	Non-Spa Visitors	Pleasure Travellers	Index
Size of Market	1,852,711	16,586,798	18,439,508	100
Canada	97.7%	94.4%	94.8%	103
Took a trip within own province / region	92.5%	85.1%	85.9%	108
Took a trip to an adjacent province / region	56.5%	47.7%	48.6%	116
Took a trip to non-adjacent province / region	41.9%	30.3%	31.4%	133
Newfoundland and Labrador	4.6%	4.3%	4.3%	107
Prince Edward Island	8.0%	7.1%	7.2%	112
New Brunswick	11.9%	11.8%	11.8%	101
Nova Scotia	13.7%	12.6%	12.7%	108
Quebec	47.5%	38.0%	38.9%	122
Ontario	59.9%	52.8%	53.5%	112
Manitoba	13.3%	8.7%	9.2%	145
Saskatchewan	15.3%	11.0%	11.4%	134
Alberta	33.4%	25.0%	25.8%	129
British Columbia	40.0%	29.6%	30.6%	131
Yukon	2.2%	0.9%	1.0%	223
Northwest Territories	0.8%	0.7%	0.7%	114
Nunavut	0.5%	0.3%	0.3%	165
United States	64.6%	49.1%	50.7%	127
Mexico	24.5%	11.0%	12.4%	198
Caribbean	28.0%	14.2%	15.6%	180
All other destinations	48.7%	32.1%	33.8%	144

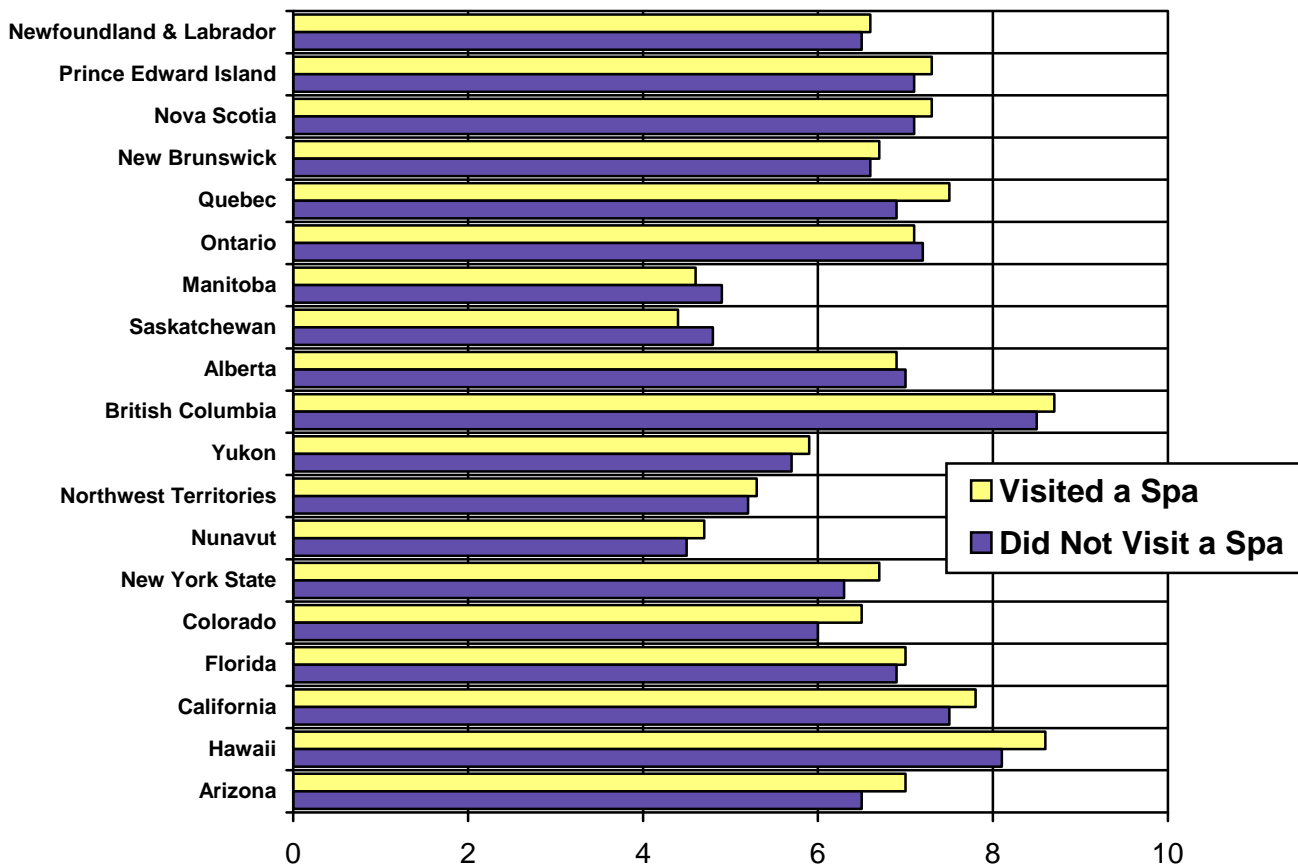
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Spa Visitors perceive the Atlantic Provinces, Quebec, British Columbia and Northern Canada to be slightly more appealing destinations than other Canadian Pleasure Travellers. They perceived British Columbia (8.7) to be the most appealing destination overall.

Spa Visitors perceive all of the U.S. reference states as more appealing destinations than other Canadian Pleasure Travellers and especially the sun-belt states (e.g., Colorado, Arizona, California) and Hawaii.

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



Other Culture and Entertainment Activities Pursued While on Trips

Spa Visitors were more much active than the average Canadian Pleasure Traveller in culture and entertainment pursuits while on a trip. They frequently went shopping and dining and visited historical sites, museums and art galleries while on trips. Relative to the average Canadian Pleasure Traveller, they were especially likely to attend live art performances (e.g., live theatre, high art performances, comedy festivals and clubs) and literary and film festivals. They were also particularly more likely than average to take part in participatory and experiential activities (e.g., wine, beer & food tastings, aboriginal cultural experiences, participatory historical activities).

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

	Visited a Spa	Did Not Visit a Spa	Pleasure Travellers	Index
Size of Market	1,852,711	16,586,798	18,439,508	100
Shopping & Dining	96.0%	81.4%	82.9%	116
Historical Sites, Museum & Art Galleries	78.3%	56.1%	58.3%	134
Fairs & Festivals	57.2%	35.5%	37.7%	152
Theme Parks & Exhibits	55.6%	37.3%	39.2%	142
Musical Concerts, Festivals & Attractions	50.7%	30.7%	32.7%	155
Wine, Beer & Food Tastings	43.4%	21.6%	23.8%	182
Live Theatre	41.0%	18.9%	21.1%	195
Casinos	39.7%	24.4%	25.9%	153
Science & Technology Exhibits	37.2%	21.6%	23.1%	161
Garden Theme Attractions	29.6%	16.3%	17.6%	168
Agro-Tourism	25.2%	14.6%	15.7%	161
Professional Sporting Events	23.4%	14.8%	15.7%	150
High Art Performances	23.3%	9.6%	11.0%	212
Comedy Festivals & Clubs	22.3%	8.8%	10.1%	220
Aboriginal Cultural Experiences	20.5%	10.6%	11.6%	176
Amateur Tournaments	19.2%	11.0%	11.8%	163
Participatory Historical Activities	12.9%	6.0%	6.7%	194
Equestrian & Western Events	10.7%	6.2%	6.7%	160
Literary & Film Festivals	7.6%	2.0%	2.6%	295
National & International Sporting Events	5.9%	2.9%	3.2%	184

Culture and Entertainment Activities Pursued in a Typical Year

Spa Visitors are also highly active in culture and entertainment pursuits while not traveling. They frequently dine in local restaurants and attend local festivals and fairs. They are also three times more likely than the average Canadian Pleasure Traveller to visits local day spas. They are frequent patrons of the local arts (e.g., classical music concerts, live theatre, ballet, opera) and local culture (e.g., art galleries and art shows, museums) and are quite active in their local nightlife (e.g., jazz clubs, dancing, bars with live pop or rock bands).

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

	Visited a Spa	Did Not Visit a Spa	Pleasure Travellers	Index
Size of Market	1,852,711	16,586,798	18,439,508	100
Going out to eat in restaurants	96.7%	90.9%	91.5%	106
Going to festivals or fairs	75.4%	59.9%	61.4%	123
Going to pick-your-own farms or farmers' market	49.9%	40.0%	41.0%	122
Going to live theatre	49.2%	33.2%	34.8%	141
Going to day spas	48.4%	9.9%	13.8%	352
Going to historic sites or heritage buildings	48.1%	38.3%	39.3%	122
Going to amateur sporting events	47.0%	41.4%	42.0%	112
Going to art galleries or art shows	46.6%	30.1%	31.8%	147
Going to museums	44.2%	31.4%	32.7%	135
Going dancing	40.8%	28.6%	29.9%	137
Going to professional sporting events	40.8%	31.1%	32.1%	127
Going to zoos or aquariums	38.0%	29.6%	30.4%	125
Going to amusement or theme parks	35.7%	28.1%	28.9%	123
Going to bars with live pop or rock bands	35.4%	26.8%	27.7%	128
Going to botanical gardens	34.3%	24.4%	25.4%	135
Going to rock music concerts	30.4%	21.6%	22.4%	135
Going to classical music concerts	24.8%	15.6%	16.5%	150
Going to gamble in casinos	19.2%	18.0%	18.1%	106
Staying overnight in a hotel or B&B in own city	17.9%	9.0%	9.9%	181
Going to jazz clubs	16.8%	6.5%	7.5%	223
Going to the ballet	13.8%	6.6%	7.3%	190
Going to the opera	11.3%	6.1%	6.6%	171
Going to rodeos	7.5%	7.3%	7.3%	103

Outdoor Activities Pursued While on Trips

Spa Visitors were much more active than the average Canadian Pleasure Traveller in almost all outdoor activities while on trips. They frequently participated in ocean activities (e.g., sunbathing, swimming in ocean), wildlife viewing, boating and swimming (e.g., motorboating, swimming in lakes) and hiking, climbing and paddling while on trips. Relative to the average Canadian Pleasure Traveller, Spa Visitors were especially active in competitive sports (e.g., tennis, golf) and in physically strenuous winter activities (e.g., downhill skiing & snowboarding, cross-country skiing & snowshoeing) and summer activities (e.g., exercise and jogging, cycling, sailing & surfing, freshwater scuba diving).

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

	Visited a Spa	Did Not Visit a Spa	Pleasure Travellers	Index
Size of Market	1,852,711	16,586,798	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	72.9%	45.8%	48.5%	150
Wildlife Viewing	58.4%	39.3%	41.2%	142
Boating & Swimming (e.g., motorboating, swimming in lakes)	56.8%	39.4%	41.1%	138
Hiking, Climbing & Paddling	51.3%	32.1%	34.1%	151
Sports & Games (e.g., tennis, board games)	41.1%	20.7%	22.7%	181
Exercising & Jogging	34.2%	13.8%	15.9%	215
Golfing	28.9%	17.1%	18.3%	158
Downhill Skiing & Snowboarding	27.0%	13.3%	14.6%	184
Fishing	24.7%	23.5%	23.6%	105
Cycling	22.5%	12.5%	13.5%	166
Skating (e.g., ice skating, rollerblading)	20.8%	11.0%	12.0%	174
Cross-country Skiing & Snowshoeing	18.3%	8.3%	9.3%	196
Snowmobiling & ATVing	16.0%	10.8%	11.3%	141
Team Sports (e.g., hockey, baseball)	14.8%	11.0%	11.4%	130
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	12.3%	5.6%	6.3%	195
Horseback Riding	10.6%	4.3%	4.9%	217
Freshwater Scuba & Snorkeling	6.1%	2.7%	3.0%	201
Wilderness Activities (e.g., wilderness skills course)	5.3%	2.0%	2.4%	225
Motorcycling	4.3%	2.8%	3.0%	145
Hunting	4.1%	4.8%	4.7%	86
Extreme Air Sports (e.g., parachuting)	3.2%	0.9%	1.1%	282

Outdoor Activities Pursued in a Typical Year

Spa Visitors are also very active in outdoor activities while not traveling. The majority exercise at home or at a fitness club, take day outings to parks, swim, hike, cycle and garden while not on trips. Relative to the average Canadian Pleasure Traveller, Spa Visitors are especially likely to go skiing (e.g., downhill skiing, cross-country skiing), to play sports (racquet sports, golfing) and to exercise and jog. On the other hand, they are less likely than others to go fishing or hunting.

Fig. 9 Outdoor Activities Pursued in a Typical Year

	Visited a Spa	Did Not Visit a Spa	Pleasure Travellers	Index
Size of Market	1,852,711	16,586,798	18,439,508	100
Exercising at home or at a fitness club	77.6%	59.1%	61.0%	127
Day outing to a park	76.5%	65.8%	66.9%	114
Swimming	73.3%	58.8%	60.3%	122
Gardening	66.2%	59.0%	59.8%	111
Picnicking	62.4%	52.0%	53.1%	118
Hiking	59.5%	47.6%	48.8%	122
Cycling	54.6%	43.2%	44.3%	123
Camping	42.9%	38.1%	38.6%	111
Jogging	35.8%	22.8%	24.1%	149
Golfing	35.7%	28.6%	29.4%	122
Ice-skating	33.7%	27.9%	28.5%	118
Sailing or other boating	32.1%	22.5%	23.4%	137
Playing racquet sports (e.g., tennis or badminton)	28.7%	18.1%	19.1%	150
Playing team sports	26.7%	22.5%	22.9%	116
Fishing	26.3%	29.6%	29.3%	90
Downhill skiing	26.0%	15.1%	16.2%	161
Canoeing or kayaking	24.0%	16.1%	16.9%	142
Rollerblading	19.6%	13.8%	14.4%	137
Cross-country skiing	19.1%	11.7%	12.5%	153
Riding an all-terrain vehicle (ATV)	14.4%	14.3%	14.3%	101
Horseback riding	12.8%	6.1%	6.8%	188
Snowmobiling	9.7%	9.8%	9.8%	99
Snowboarding	7.9%	4.7%	5.0%	158
Hunting	6.1%	7.9%	7.7%	78
Skateboarding	1.4%	1.6%	1.6%	89

Accommodation Stayed In While on a Trip

Resorts (e.g., lakeside resorts, riverside resorts, sea resorts, ski or mountain resorts) were the most common choices of accommodation for Spa Visitors. Relative to the average Canadian Pleasure Traveller, this segment was almost seven times more likely to stay at a health spa during the past two years. They were also more than twice as likely to have stayed at accommodation specializing in fine cuisine (e.g., country inn or resort with gourmet restaurant, cooking school, wine-tasting school).

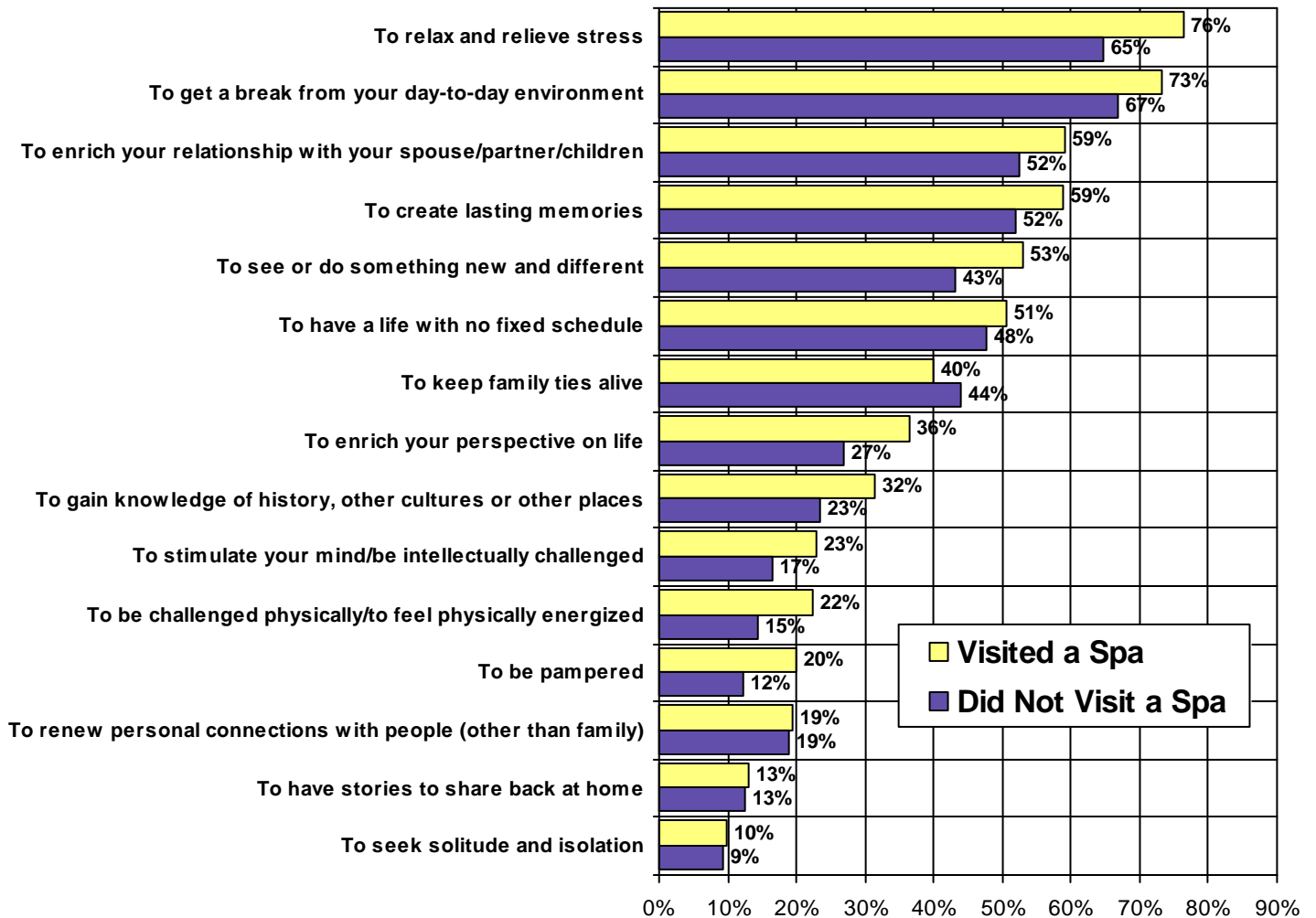
Fig. 10 Accommodation Stayed in While on Trips

	Spa Visitors	Non-Spa Visitors	Pleasure Travellers	Index
Size of Market	1,852,711	16,586,798	18,439,508	100
Lakeside / Riverside Resort	45.7%	20.1%	22.7%	201
Seaside Resort	42.1%	18.7%	21.1%	199
Health Spa	40.6%	2.1%	6.0%	672
A Public Campground in a National, State, Provincial or Municipal Park	35.7%	25.8%	26.8%	133
Ski Resort or Mountain Resort	30.8%	12.3%	14.2%	217
A Private Campground	23.5%	18.6%	19.1%	123
Country Inn or Resort with Gourmet Restaurant	14.4%	4.1%	5.2%	277
A Camp Site in a Wilderness Setting (Not a Campground)	10.5%	8.5%	8.7%	120
Wilderness Lodge You Can Drive to by Car	10.1%	5.2%	5.7%	175
Farm or Guest Ranch	5.3%	2.9%	3.1%	170
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	4.4%	4.6%	4.6%	96
On a Houseboat	2.5%	1.3%	1.4%	180
Remote or Fly-In Wilderness Lodge	2.4%	1.5%	1.6%	149
Cooking School	1.4%	0.2%	0.4%	394
Remote or Fly-In Wilderness Outpost	0.8%	0.6%	0.6%	135
Wine Tasting School	0.7%	0.2%	0.3%	270

Benefits Sought While On a Vacation

Spa Visitors seek a wide range of benefits from their vacations. As with most Canadian Pleasure Travellers, Spa Visitors take vacations to relax and relieve stress, to get a break from their day-to-day environment, to enrich family relationships, to create lasting memories, to see or do something new and different and to live without a fixed schedule. However, relative to the average Canadian Pleasure, Spa Visitors especially value relaxing vacations that allow them to be pampered and that offer both intellectual stimulation (e.g., enrich their perspective on life, gain knowledge of the history and culture of a destination) and physical challenge.

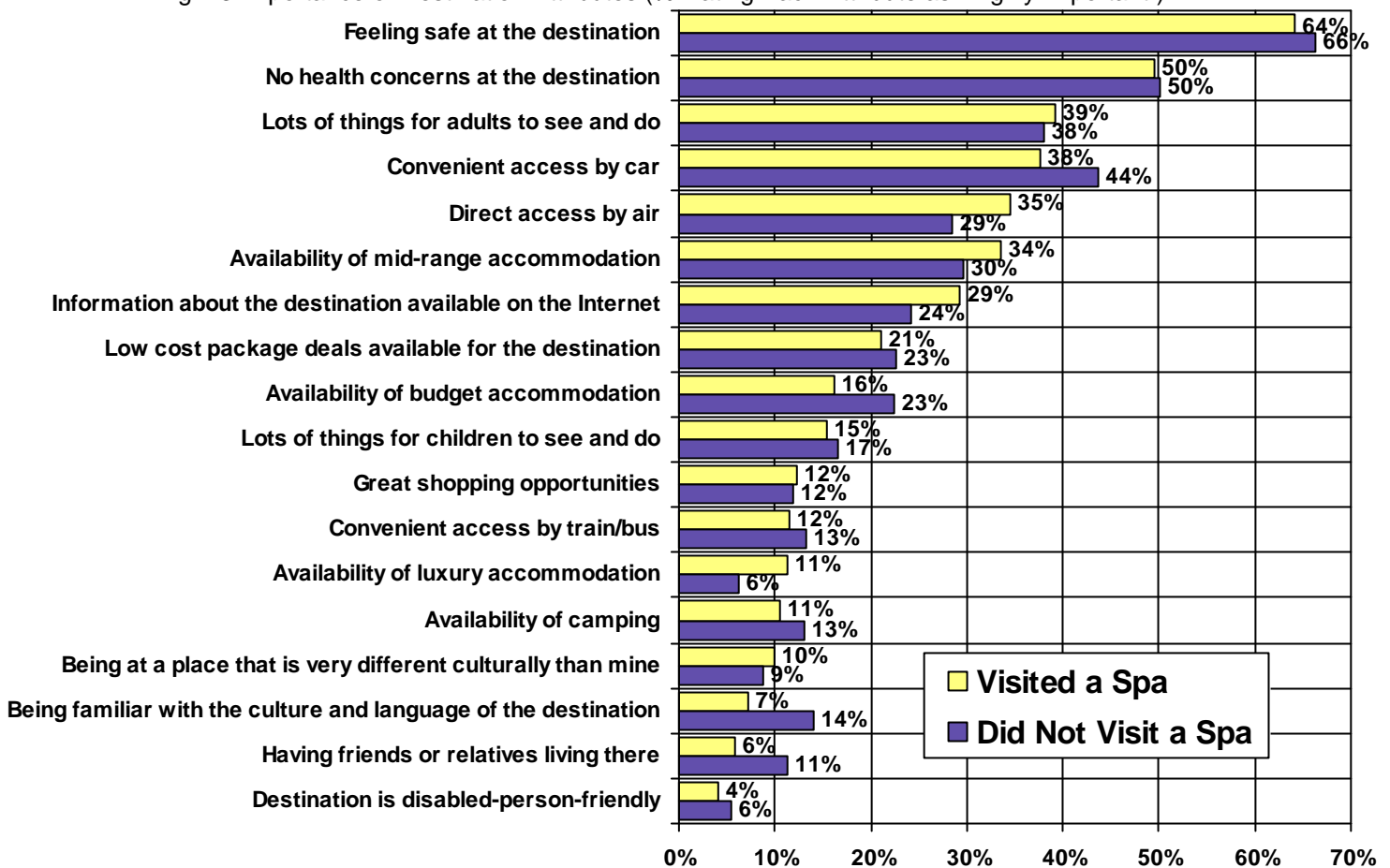
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

Similar to other Canadian Pleasure Travellers, most Spa Visitors consider it important that they feel safe at a destination. However, Spa Visitors are more likely than other Canadian Pleasure Travellers to consider it important that a destination is directly accessible by air, offers luxury accommodation and has information readily available on the Internet. They are less likely to consider it important that a destination is conveniently accessible by car, has budget accommodation, has a familiar culture and language and has friends or relatives living nearby.

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



How Destinations are Selected

Similar to the average Canadian Pleasure Traveller, Spa Visitors tend to start planning trips with a particular destination in mind. However, they are more likely than the average Canadian Pleasure Traveller to begin planning trips by considering what activities they would like to do and what experiences they would like to have while on vacation.

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

	Visited a Spa	Did Not Visit a Spa	Pleasure Travellers	Index
Size of Market	1,852,711	16,586,798	18,439,508	100
Summer				
Started with a desired destination in mind	49.3%	48.4%	48.5%	102
Started by considering specific activities wanted to do	16.2%	13.5%	13.8%	117
Started with a certain type of vacation experience in mind	25.8%	23.5%	23.7%	109
Looked for packaged deals - no destination in mind	1.6%	1.3%	1.3%	125
Considered something else first	2.9%	4.5%	4.3%	68
Don't know / Other	4.1%	8.9%	8.4%	49
Winter				
Started with a desired destination in mind	46.8%	48.9%	48.6%	96
Started by considering specific activities wanted to do	19.6%	15.0%	15.6%	126
Started with a certain type of vacation experience in mind	21.9%	18.9%	19.3%	113
Looked for packaged deals - no destination in mind	2.6%	3.3%	3.2%	81
Considered something else first	3.2%	4.9%	4.7%	68
Don't know / Other	5.9%	9.1%	8.6%	68

Trip Planning and Information Sources Consulted

The majority of Spa Visitors were responsible for planning their trips either on their own (46.0%) or with someone else (14.9%). When making travel plans, the majority use the Internet, word-of-mouth, past experiences and travel agents. Relative to other Canadian Pleasure Travellers, Spa Visitors are especially likely to obtain travel information from programs on television, travel guide books such as Fodor's, articles and advertising in the newspapers and magazines, electronic newsletters and magazines and travel agents.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Visited a Spa	Did Not Visit a Spa	Pleasure Travellers	Index
Size of Market		1,852,711	16,586,798	18,439,508	100
Who Plans Trips?	Respondent plans trips	46.0%	41.6%	42.0%	109
	Trip planning a shared responsibility	14.9%	16.6%	16.4%	91
	Someone else plans trips	39.1%	41.8%	41.5%	94
Information Sources Consulted	An Internet website	81.0%	63.4%	65.2%	124
	Advice of others / Word-of-mouth	63.0%	49.7%	51.1%	123
	Past experience / Been there before	59.4%	49.3%	50.4%	118
	A travel agent	50.0%	32.2%	34.1%	146
	Official travel guides or brochures from state / province	37.1%	24.6%	26.0%	143
	Maps	36.6%	32.1%	32.6%	112
	Articles in newspapers / magazines	33.1%	19.4%	20.9%	159
	Visitor information centres	32.3%	22.3%	23.4%	138
	Travel guide books such as Fodor's	22.6%	12.5%	13.6%	166
	An auto club such as CAA	22.2%	17.1%	17.7%	126
	Advertisements in newspapers / magazines	21.9%	13.3%	14.3%	153
	Programs on television	14.0%	6.7%	7.5%	186
	Travel information received in the mail	12.0%	8.5%	8.8%	136
	An electronic newsletter or magazine received by e-mail	6.5%	3.9%	4.2%	155
	Advertisements on television	6.3%	4.8%	5.0%	126
Visits to trade, travel or sports shows	4.6%	2.9%	3.1%	148	

Use of the Internet to Plan and Arrange Trips

Spa Visitors are the most likely of the 21 culture and entertainment types to use the Internet to plan (76.8%) and book (53.7%) travel. The majority use hotel or resort websites, airline websites, travel planning and booking websites such as Expedia and official tourism websites of countries, regions or cities. They are also much more likely than average to use cruise line websites. Spa Visitors most often purchased airline tickets and accommodation online. However, they were much more likely than others to have used the Internet to purchase tickets for specific activities or attractions and tickets for travel by rail, bus or boat and ship.

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

		Visited a Spa	Did Not Visit a Spa	Pleasure Travellers	Index
Size of Market		1,852,711	16,586,798	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	23.2%	42.8%	40.8%	57
	Uses Internet to plan trips only	23.1%	22.0%	22.1%	105
	Uses Internet to book part of trip	53.7%	35.2%	37.0%	145
Types of Websites Consulted	A website of a hotel or resort	66.1%	55.6%	57.0%	116
	An airline website	58.7%	44.5%	46.3%	127
	A travel planning / booking website	57.6%	43.9%	45.7%	126
	A tourism website of a country / region / city	53.7%	49.2%	49.8%	108
	A website of an attraction	39.1%	33.8%	34.5%	113
	Some other website	25.3%	27.9%	27.6%	92
	A cruise line website	14.2%	7.1%	8.1%	177
	A motorcoach website	3.5%	2.3%	2.5%	142
Parts of Trips Booked Over The Internet	Air tickets	78.6%	67.9%	69.5%	113
	Accommodation	77.2%	67.8%	69.2%	112
	Tickets or fees for specific activities or attractions	33.0%	22.0%	23.6%	140
	Car rental	32.7%	26.2%	27.1%	121
	Tickets for rail, bus or boat / ship fares	20.5%	14.4%	15.3%	134
	A package containing two or more items	17.4%	15.1%	15.4%	113
	Other	3.2%	4.1%	3.9%	82

Media Consumption Habits

Spa Visitors are among the heaviest users of travel media among the 21 culture and entertainment activity types. They may also be effectively reached through health and wellness magazines and websites and thorough 'better living' media (e.g., house & home websites, cooking shows). This segment may also be targeted through city lifestyle magazines and fashion and beauty magazines.

Fig. 17 Media Consumption Habits

		Visited a Spa	Did Not Visit a Spa	Pleasure Travellers	Index
Size of Market		1,852,711	16,586,798	18,439,508	100
Newspaper Readership	Reads daily newspaper	88.4%	87.1%	87.3%	101
	Reads weekend edition of newspaper	88.9%	87.1%	87.3%	102
	Reads local neighbourhood or community newspapers	64.5%	61.2%	61.5%	105
	Reads other types of newspapers	20.6%	16.8%	17.2%	120
	Frequently or occasionally reads travel section of daily newspaper	56.8%	44.5%	45.7%	124
	Frequently or occasionally reads travel section of weekend newspaper	61.8%	45.7%	47.3%	131
Types of Magazines Read (Top 5 Indexed)	Magazines about your city	21.5%	10.9%	12.0%	179
	Travel (e.g., Condé Nast)	18.4%	11.0%	11.8%	156
	Health, fitness and well living	33.9%	20.3%	21.7%	156
	Fashion and beauty	37.0%	22.2%	23.7%	156
	Regional magazines	12.2%	7.4%	7.9%	156
Type of Television Programs Watched (Top 5 Indexed)	Shopping channels	6.1%	4.4%	4.6%	133
	Travel shows	38.2%	29.4%	30.3%	126
	Late night talk shows	32.6%	26.9%	27.5%	119
	Cooking shows	36.8%	31.2%	31.7%	116
	Biography	47.8%	41.7%	42.3%	113
Type of Radio Programs Listened To (Top 5 Indexed)	Multicultural	12.5%	7.9%	8.4%	150
	Jazz / Big band	11.4%	8.5%	8.8%	130
	Soft music / Adult contemporary	32.9%	24.9%	25.7%	128
	Classical music	21.8%	16.7%	17.2%	127
	Top 40 / Current hits	30.8%	24.5%	25.2%	123
Types of Websites Visited (Top 5 Indexed)	Travel	69.8%	48.2%	50.6%	138
	House and home	36.2%	27.1%	28.1%	129
	Health	52.7%	42.4%	43.5%	121
	Magazine sites	19.0%	16.3%	16.6%	115
	Shopping (all types)	37.6%	33.0%	33.5%	112

Appendix One Canadian TAMS 2006 Culture and Entertainment Segmentation		
Activity Segment	Activities in Segment	
Historical Sites, Museums & Art Galleries	Well-known Historic Sites or Buildings	Well-known Natural Wonders
	Other Historic Sites, Monuments and Buildings	Historical Replicas of Cities or Towns With Historic Re-Enactments
	Strolling Around a City to Observe Buildings and Architecture	Museum - Military /War Museums
	Museum - General History or Heritage Museums	Art Galleries
		Paleontological/Archaeological Sites
Shopping & Dining	Shop Or Browse - Bookstore or Music Store	Shop Or Browse – Antiques
	Shop Or Browse - Clothing, Shoes and Jewellery	Shop Or Browse - Gourmet Foods in Retail Stores
	Shop Or Browse - Local Arts & Crafts Studios or Exhibitions	Shop Or Browse - Greenhouse or Garden Centre
	Dining - Restaurants Offering Local Ingredients and Recipes	High-End Restaurants with an International Reputation
	Went to Local Outdoor Cafes	Other High-End Restaurants
Aboriginal Cultural Experiences	Aboriginal Cuisine (Tasted or Sampled)	Aboriginal Arts and Crafts Shows
	Aboriginal Heritage Attractions (e.g., Museums, Interpretive Centres)	Aboriginal Cultural Experiences in a Remote or Rural Setting
	Aboriginal Festivals & Events (e.g., Powwows)	Aboriginal Outdoor Adventure and /or Sports
Fairs & Festivals	Farmers' Markets or Country Fairs	Firework Displays
	Carnivals	Ethnic Festivals
	Exhibition or Fairs	Food /Drink Festivals
Science & Technology Exhibits	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
Theme Parks & Exhibits	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Entertainment Farms (e.g., Corn Maze, Petting Zoo)
	Wax Museums	
High Art Performances	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	
Professional Sporting Events	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	Professional Soccer Games
Live Theatre	Live Theatre	Live Theatre with Dinner
	Theatre Festivals	
Literary & Film Festivals	Literary Festivals or Events	International Film Festivals
Tastings	Went to Wineries for Day Visits and Tasting	Cooking /Wine Tasting Courses
	Went to Breweries for Day Visits and Tasting	Visited Food Processing Plants (e.g., Cheese Factory)
Casinos	Went to a Casino	
Spas	Day Visit to a Health & Wellness Spas while on an Overnight Trip	
Participatory Historical Activities	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National /Provincial Park
	Curatorial Tours	Archaeological Digs
Equestrian & Western Events	Equine (Horse) Competitions	Western Theme Events (e.g., Rodeos)
	Horse Races	

Appendix One		
Canadian TAMS 2006 Culture and Entertainment Segmentation		
Activity Segment	Activities in Segment	
Agro-Tourism	Dining At A Farm	Harvesting and /or Other Farm Operations
	Went Fruit Picking at Farms or Open Fields	
National & International Sporting Events	Curling Bonspiel	National /International Sporting Events such as the Olympic Games
	Professional Figure Skating	
Gardens Theme Attractions	Garden Theme Park	Botanical Gardens
Amateur Tournaments	Amateur Sports Tournaments and Competitions	Amateur Tournaments and Competitions other than Sports-related
Musical Concerts, Festivals & Attractions	Music Festivals	Musical Attractions
	Jazz Concert	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
	Rock & Roll/Popular Music Concert	Country & Western Music Concert
Comedy Festivals & Clubs	Comedy Festivals	Stand-up Comedy Clubs & Other Variety Shows

Appendix Two: Canadian TAMS 2006 Outdoor Activity Segmentation

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