

**Spotlight on American
Group & Learning Tourists
A National Perspective**

(TAMS 2006)

Prepared by
Research Resolutions & Consulting Ltd.

Prepared for
Alberta Tourism, Parks, Recreation and Culture
Atlantic Canada Tourism Partnership
Department of Canadian Heritage
Parks Canada
Tourism & Culture, Government of Yukon
Tourism British Columbia
Travel Manitoba

February 2007

TABLE OF CONTENTS

I. Introduction.....	4
A. BACKGROUND	4
B. CONTENT AND DEFINITIONS.....	5
1. <i>The Overview Report</i>	5
2. <i>About the Travel Activities and Motivation Survey (TAMS)</i>	7
C. OBSERVATIONS & KEY FINDINGS	8
II. American Group Tourist & Learning Tourist Markets.....	12
A. AN OVERVIEW OF THE MARKET	12
1. <i>At the Canada Level</i>	12
2. <i>At the Regional Level</i>	14
3. <i>Touring Segments</i>	16
B. GROUP TOURIST PROFILES	17
1. <i>Demographic Profiles</i>	17
a) <i>Place of Residence</i>	17
b) <i>Personal and Household Characteristics</i>	18
2. <i>Lifestage</i>	21
III. Competitive Destinations.....	22
A. WORLDWIDE DESTINATIONS FOR OVERNIGHT PLEASURE TRIPS	22
B. CANADIAN DESTINATIONS	24
C. OUT-OF-STATE U.S. PLEASURE TRAVEL DESTINATIONS.....	26
D. DESTINATIONS: ROLE & RATINGS	28
1. <i>Importance of Destination</i>	28
2. <i>Importance of Conditions in Destination Choice</i>	29
3. <i>Appeal of Various Destinations</i>	32
4. <i>Number of Good Reasons to Visit Various Destinations</i>	35
IV. Activities That Motivate Overnight Trips.....	37
A. INTRODUCTION	37
B. ACTIVITY-BASED TRIP MOTIVATORS	39
1. <i>Major Category Motivators</i>	39
2. <i>Intermediate Category Motivators</i>	41
a) <i>Participatory Outdoor Activities</i>	41
b) <i>Cultural/Learning Activities & Events</i>	43
c) <i>Entertainment Activities & Events</i>	45
d) <i>Food & Wine Activities</i>	46
e) <i>Lodging Activities</i>	47

V. Trip Planning 48

 A. WHO DOES THE PLANNING? 48

 B. TRAVEL INFORMATION SOURCES & TRAVEL MEDIA 49

 C. INTERNET USE FOR TRAVEL INQUIRIES & BOOKINGS..... 52

VI. Other Travel-Related Information..... 54

 A. USE OF PACKAGE DEALS 54

 B. BENEFITS SOUGHT FROM PLEASURE TRAVEL 55

 C. INCIDENCE OF SUMMER/WINTER TRIPS 57

 D. INCIDENCE OF OVERNIGHT CRUISES 58

 E. MEMBERSHIPS IN VARIOUS ORGANIZATIONS..... 59

VII. Appendices..... 60

 A. ACTIVITY-BASED TRIP MOTIVATORS – MAJOR & INTERMEDIATE CATEGORIES ... 61

 B. TRIP ACTIVITY GROUPINGS..... 62

 C. TNS CANADIAN FACTS’ “LIFESTAGES” DEFINITIONS 68

I. Introduction

A. Background

This report provides information on the American overnight group tour and learning travel markets for Canada. Findings are based on information collected in the 2006 Travel Activity and Motivation Survey (TAMS). Research Resolutions & Consulting Ltd. undertook the project on behalf of seven tourism organizations across Canada:

1. Alberta Tourism, Parks, Recreation and Culture
2. Atlantic Canada Tourism Partnership
3. Parks Canada
4. Tourism & Culture, Government of Yukon
5. Tourism British Columbia
6. Travel Manitoba
7. Department of Canadian Heritage

These TAMS partners supplied Research Resolutions with the TAMS file specifically for this analysis.

In addition to this overview report, all partners were provided with detailed computer tabulations from the 2006 TAMS US data file. Regional reports and tabulations have also been provided to selected partners:

- **Western Canada**, supported by Alberta Tourism, Parks, Recreation and Culture; Tourism British Columbia; and Tourism & Culture, Government of Yukon;
- **Atlantic Canada** supported by the Atlantic Canada Tourism Partnership (ACTP).

B. Content and Definitions

1. The Overview Report

This overview report contains demographic, trip activity, attitudinal and travel planning profiles of American adults who claim to have taken an overnight pleasure trip to Canada in the past couple of years¹ and meet one or both of the following conditions:

- **Group Tourists:** have taken an organized overnight group tour in the past couple of years²;
- **Learning Tourists:** declare that *gaining knowledge of history, other cultures or other places or stimulating the mind/being intellectually challenged* is a “highly important” benefit of pleasure travel.³

In addition to a Canada-wide overview, this report provides limited information on group and learning tourists who have taken recent trips to destinations in Western Canada, Manitoba/Saskatchewan, Ontario, Quebec and Atlantic Canada.⁴ For more details on group and learning tourists in Western and Atlantic Canada, the reader is directed to customized reports on these regions provided to the partners who funded the regional reports.

To render the extensive *trip activity* information contained in the TAMS survey more useful, Research Resolutions created several *tiers* or groupings of the

Note to Readers

Group tour experiences and locations visited in Canada are *independent* of one another.

In other words, the American tourists featured in this analysis claim to have taken organized overnight group tours in the past couple of years but their group tour experiences may or may not have occurred at the Canadian destinations they claim to have visited over the same time period.

¹ Since fieldwork for the study was conducted between January and June 2006, the “past couple of years” likely refers to 2004 and 2005. It is important to note, however, that when asked to report travel activities over a two-year period, consumers are prone to imprecision by focussing on “salient trips” (most memorable, most expensive, etc.) and/or by “telescoping” the specified time period (extending the time frame over which trips are reported beyond the specified two years). In light of this potential imprecision, a liberal interpretation of the “reference period” is advised. Throughout this report, the terms “past couple of years” and “recent” are commonly used to describe the “past 2 year” recall period.

² See Question 4, TAMS US questionnaire.

³ See Question 22, TAMS US questionnaire.

⁴ Because Ontario and Quebec did not participate in the partnership, limited information is provided for these provinces.

many individual activities included in the study's questionnaire. The plan used to combine trip activities is appended to this report.

2. About the Travel Activities and Motivation Survey (TAMS)

The 2006 Travel Activity and Motivation Survey (TAMS) was sponsored by the following organizations:

Alberta Tourism, Parks, Recreation and Culture ⁵	Ontario Tourism Marketing Partnership
Atlantic Canada Tourism Partnership	Parks Canada
Canadian Tourism Commission	Quebec Ministry of Tourism
Department of Canadian Heritage	Statistics Canada
Government of Northwest Territories	Tourism British Columbia
Government of Yukon	Tourism Manitoba
Ontario Ministry of Tourism	Tourism Saskatchewan

TNS Canadian Facts conducted the U.S. portion of the study between January and June 2006. The universe under study was composed of American adults (18 years and over) who were members of TNS Canadian Facts' mail panel.

Over the course of the fieldwork, 60,649 self-completed questionnaires were returned and processed by TNS Canadian Facts. Among panel members who were asked to participate in the study, the response rate was approximately 71%. The supplier has not provided the recruitment rate for panel members. In the absence of this information, it is not possible to estimate the actual response rate for the study or to comment on the representativeness of the sample overall.

Survey data were weighted and projected to the U.S. adult population based on U.S. Census estimates of household size, age and gender at a variety of city/state and/or regional levels.

Research Resolutions used the TAMS U.S. data files provided by TAMS partners. As such, the firm takes no responsibility for the quality of the data or the accuracy of the weighting and projection processes.

⁵ Formerly *Alberta Economic Development*.

C. Observations & Key Findings

CANADA IS ESPECIALLY SUCCESSFUL IN ATTRACTING GROUP TOURISTS AND GROUP LEARNING TOURISTS.

Canada attracts about one-in-eight of the 166.0 million overnight pleasure travellers to any destination (13%) but is much more successful in attracting those who take group tours and/or have a special interest in learning travel.

More than one-in-four of the 19.9 million Group Tourists living in the U.S.A. claim to have visited Canada for a pleasure trip recently (27% or 5.3 million Americans). Of the 8.9 million Americans in the learning sub-set of the Group market, about one-in-three have been recent pleasure tourists in Canadian destinations (30%, or 2.7 million).

Canada is not as successful in attracting the broader *All Learning Tourists* segment. This market represents 46.9 million American pleasure travellers. Almost eight million of them have taken recent overnight pleasure trips to Canada (17%, or 7.8 million).

A PORTION OF THE U.S. GROUP AND LEARNING MARKETS IS SIMPLY OUT OF REACH FOR CANADIAN DESTINATIONS.

Even though Canada attracts American tourists in the group and learning markets at a higher rate than it attracts the typical U.S. pleasure traveller, about one-third of *all* Group Tourists (37%) and almost two-fifths of the total learning market (57%) *only* take pleasure trips *within* the U.S.⁶

EACH OF CANADA'S REGIONS BENEFITS FROM GROUP TOURISTS.

Group Tourists represent noteworthy proportions of each region's recent American pleasure visitors. These tourists represent two-fifths of **Atlantic Canada's** U.S. pleasure market (past two years), one-third in **Western Canada, Manitoba/ Saskatchewan** and **Quebec** and one-quarter of **Ontario's** U.S. pleasure market.⁷

⁶ See Detailed Tables, Volume 1, page 47-7 for figures.

⁷ Americans who claim to have taken an overnight pleasure trip to the named region/province in the past two years.

SOME CANADIAN DESTINATIONS ARE MORE SUCCESSFUL THAN OTHERS IN ATTRACTING GROUP LEARNING TOURISTS.

Newfoundland and Labrador, Prince Edward Island and the Yukon have particular appeal to Group Tourists and Group Learning Tourists. In contrast, Ontario, with its very sizeable U.S. visitor volume, seems to under-perform in the Group Tour/Learning Tour markets.

AMERICAN GROUP TOURISTS LIVE IN VIRTUALLY EVERY U.S. REGION AND STATE.

Reflecting the U.S. population's regional distribution, American pleasure travellers as a whole, those with recent pleasure trips to Canada and Group Tourists are concentrated in the South Atlantic, Mid-Atlantic, East North Central and Pacific regions.

GROUP TOURISTS COME IN ALL AGES AND BOTH GENDERS.

They are, however, older and more apt to be women than are typical American tourists to Canada. Older women are especially prevalent among Group Learning Tourists whereas the more generic *All Learning Tourist* segment much more closely resembles typical American tourists to Canada in terms of age and gender. Consistent with their ages, members of the Group Tourist market are predominantly older parents and working or retired older couples.

NOT ALL GROUP TOURISTS ARE OLD RETIREES!

Close to half of them are still actively engaged in the labour market and over one-quarter are holding executive, managerial or professional positions.⁸ They represent the full range of household incomes, with about one-third claiming incomes under \$60,000, about one-third in the \$60,000 to under \$100,000 bracket, and the same proportion in the more affluent \$100,000+ bracket. Similar income distributions are evident for Group Learning Tourists and All Learning Tourists.

⁸ Male or female head of household reports this occupation category.

SUN/SEA DESTINATIONS ARE MAJOR COMPETITORS FOR THE GROUP AND LEARNING MARKETS.

The primary foreign competition within the Group Tourist market comes from Mexico (30%), the Caribbean (29%) and Europe (29%). No matter what a Canadian destination does in terms of product development or marketing, it will meet with stiff competition from foreign and, more commonly, U.S. domestic *sun/sea* destinations.

Three-quarters of the Group Tourists who have recently travelled in Canada left their "home state" to travel to a U.S. sun/sea destination for an overnight pleasure trip in the past two years. Led by **Florida, California and Nevada**, sun/sea states are popular with *all* U.S. pleasure travellers but are especially so among Group and Group Learning Tourists.

SAFETY IS A TOP PRIORITY.

Like other American tourists, the group and learning markets put *feeling safe* at the top of their conditions for destination choice. They also want a destination with **many things for adults to see and do**. The importance of activities for adults is especially prevalent among Group Learning Tourists and All Learning Tourists and is consistent with the most highly valued benefit of vacationing for these segments: **seeing and doing something new and different**.

GROUP AND LEARNING-ORIENTED TOURISTS HAVE A WIDE VARIETY OF ACTIVITY-BASED REASONS FOR TRAVEL.

These tourists are not readily pigeonholed. About 6-in-10 have taken overnight trips motivated by **nature or outdoor activities** while 5-in-10 took trips in order to go to theme parks or other **entertainment activities** including casinos. The same proportion took trips motivated by **culture and learning-oriented activities** such as museums, art galleries, or performances, hands-on learning experiences and Aboriginal culture. Approximately one-third have recently taken trips for a **wilderness lodge, resort, or spa experience** and about one-quarter have been motivated by their **culinary or wine** interests.

THEY HAVE DIFFERENT INTERESTS THAN TYPICAL AMERICAN VISITORS TO CANADA.

The group/learning niche markets are more likely than the typical U.S. overnight pleasure traveller to Canada to be motivated by **cultural and/or learning activities**. This penchant for culture/learning is, not surprisingly, most prevalent in the Group Learning Tourist segment. Similarly, interests in **food and wine** are more likely to drive trips by Group Tourist and Group

Learning Tourists than is the case among typical Americans that come to Canada for overnight pleasure trips.

THE INTERNET TOPS THE CHARTS AS A SOURCE OF TRAVEL PLANNING INFORMATION.

Of the many sources of travel information available to consumers, the **internet** is the most widely used. A salient, though anticipated, difference between group tourists and typical American overnight pleasure travellers to Canada is the higher level of reliance on **travel agents** by those who make group bookings. One-half of Group Tourists and Group Learning Tourists rely on travel agents as a source of information, compared to about one-third of All Learning Tourists and somewhat fewer typical American overnight pleasure travellers to Canada.

IN SUMMARY, U.S. GROUP AND GROUP LEARNING TOURISTS WANT WHAT CANADA CAN OFFER.

At a general level, they want adult-oriented experiences that focus on *new and different* cultural activities or a blend of cultural and passive outdoor experiences. Their specific trip motivation and activity preferences differ from those of the typical American visitor to Canada. Consequently, destinations and tourism businesses wishing to package and promote group and learning tourism should attend closely to the many *niche* experiences identified by these tourists. It is by attending to these smaller interest groups that Canada's destinations can provide the *new and different* that group and learning travellers are seeking.

They are most readily reached through the internet and travel agents. While Canada will face stiff competition for group and learning tourists, especially from sun/sea destinations within the U.S., in Mexico and the Caribbean, almost all regions, and particularly the Atlantic provinces, have solid track records on which to build future successes.

II. American Group Tourist & Learning Tourist Markets

A. An Overview of the Market

1. At the Canada Level

U.S. Overnight Pleasure Travellers: Of the 222.8 million American adults who might have taken overnight trips for pleasure or vacation purposes in the past couple of years, 166.0 million, or seventy-five percent, claim to have done so. Almost 21 million Americans chose Canada for an overnight pleasure trip over a two-year period.

The **Group Tourist** market for *any* destination is estimated to be about twenty million American **overnight pleasure travellers** (19.9 million). The subset of this market with expressed interest in *learning* travel represents about nine million American adults (8.9 million). Thus, the **Group Learning Tourist** segment is close to half of the entire Group Tourist market (45%).

There are many more American **Learning Tourists** than Group Learning Tourists. In fact, the Group Learning segment represents only one-fifth of the 47.0 million American overnight pleasure travellers in the more broadly defined *All Learning Tourist* segment.

Cruise/Group Tourists: Because there are areas of commonality between overnight cruise and organized group tour experiences, pleasure travellers who participated in either of these activities were combined to get an estimate of total market size. Almost 2-in-10 overnight pleasure travellers or 39.3 million Americans say that they have taken an overnight **cruise** and/or an overnight **group tour** (different locations and/or single location). These tourists are almost evenly divided between those who took a cruise but did not take a group tour (cruise *only* 19.4 million) and those who took at least one overnight group tour (19.9 million).⁹

Key Definitions

Overnight Pleasure Travellers: U.S. adults (18+) who claim to have taken an overnight pleasure/vacation trip in the past two years.

Group Tourists: U.S. adults (18+) who have taken an organized overnight group tour in the past couple of years (any destination).

Group Tourists in Canada/Regions: Group tourists (see above) who have taken an overnight pleasure trip to Canada or the named province, territory or region in the past couple of years.

Group Learning Tourists: Group Tourists who are also Learning Tourists (see below).

All Learning Tourists: Overnight pleasure tourists who claim that *gaining knowledge of history, other cultures or other places or stimulating the mind/ being intellectually challenged* is a "highly important" benefit of pleasure travel. These tourists may or may not be "Group Tourists".

Western Canada: Alberta, British Columbia, and Yukon.

⁹ "Group Tourists" may or may not have taken overnight cruises in the past two years.

TABLE 1: OVERVIEW OF MARKET SIZE

	U.S. Overnight Pleasure Travellers To . . .					
	U.S. Adult Population (60,649) 222.8 million		Any Destination (45,697) 166.0 million		Canada (6,771) 20.8 million	
Unweighted base Weighted, Projected Overnight pleasure traveller to Canada, past 2 years	20.8 million	9%	20.8 million	13%	20.8 million	100%
Group Tourists	20.4 million	9%	19.9 million	12%	5.3 million	26%
Learning	9.1 million	4%	8.9 million	5%	2.7 million	13%
All Learning Tourists	49.7 million	22%	46.9 million	28%	7.8 million	38%
Group/Cruise Tourists	40.2 million	18%	39.3 million	24%	9.4 million	45%
Cruise Only	19.8 million	9%	19.4 million	12%	4.1 million	20%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1, pages 1, 49.

Canada is especially successful in attracting Group Tourists and Group Learning Tourists.

- Of the 166.0 million overnight pleasure travellers, about 1-in-8 claim to have taken a pleasure trip to Canada in the past two years (13%) [See Table 2].
- The proportions of Group Tourists and Group Learning Tourists with recent pleasure trips to Canada are much higher. In fact, more than 1-in-4 American Group Tourists claim to have visited Canada for a pleasure trip recently (27%) and almost 1-in-3 Group Learning Tourists are recent pleasure tourists at Canadian destinations (30%).
- Canada is not as successful in attracting the broader Learning Travel segment. Nonetheless, at 17%, the Learning Travel segment comes to Canada at a somewhat higher rate than Canada's share of the total overnight pleasure travel market (13%) would suggest.

TABLE 2: CANADA'S SHARE OF VARIOUS MARKET SEGMENTS

	Any Destination	Canada	Canada's Share
Overnight pleasure travellers	166.0 million	20.8 million	13%
Group Tourists	19.9 million	5.3 million	27%
Group Learning Tourists	8.9 million	2.7 million	30%
All Learning Tourists	46.9 million	7.8 million	17%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 page 49. This table displays horizontal percentages for each row.

Since one of the defining characteristics of **Group Learning Tourists** and **Learning Tourists** in general is their interest in gaining *knowledge of history, other cultures or other places* when travelling, it is not surprising that as a *foreign* destination, Canada is especially successful in attracting members of these segments.

2. At the Regional Level

Canada's regions attract U.S. overnight pleasure travellers in varying numbers, from a high of almost twelve million for Ontario over a two-year time span to a low of approximately one million for Manitoba/Saskatchewan.

Group Tourists are substantively over-represented in each of Canada's regions relative to their proportion of the U.S. travelling public at large (*any destination*).

- Only one-in-eight U.S. overnight pleasure travellers to any destination are Group Tourists whereas two-fifths of those who have taken an overnight pleasure trip to destinations in **Atlantic Canada** (40%) are Group Tourists.
- One-third of overnight pleasure travellers with a recent visit in **Western Canada** (33%), **Manitoba/Saskatchewan** (33%) or **Quebec** (31%) are Group Tourists.
- **Ontario** attracts Group Tourists at a lower rate than any other region (24%). Nonetheless, the sheer size of this province's U.S. tourist base results in Ontario capturing 2.9 million U.S. Group Tourists – more than any other region.

	U.S. Adult Population	U.S. Overnight Pleasure Travellers To . . .						
	Total	Any Destination	Canada	Western Canada	Man/ Sask	Ontario	Quebec	Atlantic Canada
Unweighted base	(60,649)	(45,697)	(6,771)	(1,966)	(354)	(4,179)	(1,096)	(634)
Weighted, Projected	222.8 million	166.0 million	20.8 million	6.2 million	1.0 million	11.9 million	4.1 million	2.6 million
Group Tourists	9%	12%	26%	33%	33%	24%	31%	40%
<i>Number in millions</i>	20.4	19.9	5.3	2.0	0.3	2.9	1.3	1.0
Learning	4%	5%	13%	16%	18%	12%	19%	25%
<i>Number in millions</i>	9.1	8.9	2.7	1.0	0.2	1.4	0.8	0.6
All Learning Tourists	22%	28%	38%	44%	43%	37%	45%	47%
<i>Number in millions</i>	49.7	46.9	7.8	2.7	0.4	4.4	1.8	1.2
Group/Cruise Tourists	18%	24%	45%	56%	49%	39%	51%	71%
Cruise Only	9%	12%	20%	24%	16%	15%	20%	31%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1, page 47.

Group Learning Tourists are also over-represented in Canada's regions. Again, relative to their share of U.S. overnight pleasure travellers in general and those who have recently travelled to Canada, **Atlantic Canada** is most successful in attracting Group Learning Tourists. One-in-four of this region's recent American pleasure tourists are in this market segment. And, again, from a share perspective, Ontario is

least successful in attracting Group Learning Tourists (12%). Other regions fall between Atlantic Canada and Ontario.

Consistent with Canada's success in attracting Learning Tourists as a whole, each region captures U.S. visitors in this segment at a higher rate than would be expected based on the learning segment's share of the total overnight pleasure travel market (28%). Over two-fifths of the inbound pleasure market from the U.S. to Atlantic Canada (47%), Quebec (45%) and Western Canada (44%) are Learning Tourists. Ontario is less successful than other regions in attracting U.S. Learning Tourists (37%).

Table 4 displays the *share* each region represents of U.S. overnight pleasure travellers to **Canada** in each of the key market segments.¹⁰ When viewed from this perspective, the prominence of Atlantic Canada in the Group Tourist market, and particularly in the Group Learning subset is clearly evident. This region attracts twice as many Group Learning Tourists (24%) as its share of total U.S. overnight pleasure visitation to Canada would suggest (12%).

	Proportion of Total U.S. Overnight Pleasure Travellers To Canada with Destinations in . . .				
	Western Canada	Man/Sask	Ontario	Quebec	Atlantic Canada
Overnight pleasure travellers	30%	5%	57%	20%	12%
Group Tourists	38%	6%	54%	24%	19%
Group Learning Tourists	37%	7%	54%	28%	24%
All Learning Tourists	35%	6%	56%	24%	15%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 1, 2, 3. Note: row percentages add to more than 100% due to duplication of visitors to various regions.

Information about the market size and characteristics of Group Tourists in British Columbia, Alberta and Yukon Territories is provided in a separate report on Group Tourists in Western Canada. Analogously, more information on the four Atlantic provinces is contained in a stand-alone Atlantic Canada report. These regional reports are provided to the respective partners that commissioned them.

¹⁰ Rows add to more than one hundred percent because some Americans travel to more than one of Canada's regions.

3. Touring Segments

Americans with recent Canadian travel experiences who take group tours seem to like having the trip organization done for them, whether for an overnight trip or same-day excursion.¹¹ They display a strong preference for *multiple location* tours in which they stayed for one or more nights at different locations (76%). By definition, all members of this market segment take *overnight* organized tours but only about 3-in-10 go on self-directed overnight touring trips. Same-day excursions for these Group Tourists also tend to be “organized” (51%) rather than self-directed (39%).

Members of the learning subset of Group Tourists display a particularly strong propensity to take *multiple location* tours (82%). They are also somewhat more inclined to take self-directed overnight tours (37%) and same-day excursions (46%) than is the Group Tourist segment as a whole.

Over half of All Learning Tourists claim to have taken an overnight organized tour in the past couple of years, with slightly more of these Americans opting for a *multiple location* tour (28%) than for one with a *single location* (19%). These more generic learning tourists are equally likely to take an organized or self-directed same-day tour (39% each).

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada		Group Tourists (1,530) 5.3 million	Group Learning Tourists (742) 2.7 million	All Learning Tourists (2,454) 7.8 million
	Any Location (45,697) 166.0 million	Any (6,771) 20.8 million			
Overnight Touring (NET)	20%	39%	100%	100%	51%
Organized Tour	12%	26%	100%	100%	55%
Multiple Location	8%	19%	76%	82%	28%
Single Location	7%	14%	55%	56%	19%
Self-Directed Touring	11%	20%	30%	37%	29%
Same-Day Touring (NET)	30%	47%	62%	65%	55%
Organized Excursion	19%	32%	51%	55%	39%
Self-Directed Touring	20%	31%	39%	46%	39%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1, page 12.

¹¹ Same-day excursions on overnight trips.

B. Group Tourist Profiles

1. Demographic Profiles

a) Place of Residence

From a regional perspective, American Group Tourists who travel in Canada are a microcosm of *all* U.S. overnight pleasure travellers. They live in virtually every U.S. region and state. Reflecting the U.S. population's regional distribution, American pleasure travellers as a whole, those with recent pleasure trips to Canada and Group Tourists are concentrated in the South Atlantic, Mid-Atlantic, East North Central and Pacific regions.

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location (45,697)	Any Province/ Territory (6,771)	Group Tourists (1,530)	Group Learning Tourists (742)	All Learning Tourists (2,454)
Unweighted base					
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
US Regions					
New England	5%	8%	6%	7%	8%
Massachusetts	2%	3%	2%	2%	3%
Middle Atlantic	14%	20%	20%	23%	20%
New York	6%	11%	10%	10%	10%
East North Central	16%	22%	20%	16%	19%
Michigan	4%	8%	7%	5%	6%
Illinois	4%	4%	4%	4%	4%
West North Central	7%	6%	7%	7%	6%
South Atlantic	19%	13%	16%	15%	14%
Florida	6%	5%	5%	5%	5%
East South Central	6%	3%	5%	5%	3%
West South Central	11%	5%	5%	7%	6%
Texas	7%	3%	4%	5%	4%
Mountain	7%	4%	4%	3%	4%
Pacific	17%	18%	18%	18%	20%
California	13%	10%	13%	13%	12%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1, page 42

States that are especially apt to generate Group Tourists include New York (10%), Michigan (7%) and California (13%). The share of Group Tourists with recent pleasure trips in Canada from each of these states is, for the most part, consistent with the state's share of the total U.S. population. The regional distributions of Group Learning Tourists and All Learning Tourists parallel those evident for the Group Tourist market as a whole.

b) Personal and Household Characteristics

Age & Gender

While every age group is represented among **Group Tourists**, these tourists tend to be older than the typical American tourist to Canada. Over half of them are 55 years of age or more. They are also more apt to be women (54%) than men (46%). In fact, women who are 55 years of age or older represent about one-third of the Group Tourist market but constitute only one-fifth of *all* U.S. overnight pleasure travellers to Canada. An even stronger skew toward older women is evident among **Group Learning Tourists**.

Interestingly, however, **All Learning Tourists** closely resemble the typical American tourist to Canada from an age and gender perspective. The same proportions of All Learning Tourists are in the youngest age group (22%, 18 – 34 years) as are in the oldest cohort (24%, 65+ years). These tourists are equally divided between men and women.

Table 7: AGE & GENDER | **American Overnight Pleasure Travellers With Destinations in . . .**

	Canada				
	Any Location (45,697)	Province/ Territory (6,771)	Group Tourists (1,530)	Group Learning Tourists (742)	All Learning Tourists (2,454)
Unweighted base					
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Age					
18 – 34 Years	32%	26%	17%	14%	22%
35 – 44 Years	17%	14%	9%	9%	13%
45 – 54 Years	21%	21%	19%	20%	20%
55 – 64 Years	16%	19%	21%	21%	21%
65+ Years	14%	20%	34%	36%	24%
Gender					
Men	49%	52%	46%	43%	50%
55+ Years	15%	20%	25%	23%	22%
Women	51%	48%	54%	57%	50%
55+ Years	15%	19%	30%	34%	23%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 page 38.

Race, Education, Occupation, and Income

Almost all American overnight pleasure travellers, regardless of their destination or predisposition to take group or learning trips, are white. About half the U.S. Group Tourists who come to Canada are university educated – a proportion similar to the typical U.S. overnight pleasure tourist in Canada. Not surprisingly, a slightly higher proportion of Group Learning Tourists and the broader Learning Tourist segments have at least one university degree (55%).

In light of their tendency to be in the 55+ or 65+ age groups, it comes as no surprise that Group Tourists are less likely to be in the labour force (52%) than is the U.S. overnight pleasure market for Canada as a whole (63%). These Group Tourists are not, however, all old retirees! Close to half of them are still actively engaged in the labour market and over one-quarter are holding executive, managerial or professional positions.

Table 8: RACE, EDUCATION, OCCUPATION, INCOME

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location (45,697)	Any Province/ Territory (6,771)	Group Tourists (1,530)	Group Learning Tourists (742)	All Learning Tourists (2,454)
Unweighted base					
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Race					
White	86%	88%	87%	83%	85%
African American	6%	4%	4%	5%	5%
Asian American	2%	3%	4%	5%	3%
Education					
High school diploma or less	20%	14%	15%	13%	10%
Some post-secondary	29%	26%	25%	20%	22%
Post-secondary diploma or certificate	10%	10%	9%	10%	10%
University degree+	39%	49%	51%	55%	55%
Labour Force Participant¹					
Retired	15%	21%	34%	36%	25%
Executive/Manager /Professional ²	30%	32%	28%	29%	31%
Household Income³					
Under \$40,000	27%	18%	18%	16%	17%
\$40,000 - \$59,999	19%	17%	18%	17%	16%
\$60,000 - \$99,999	30%	32%	31%	32%	32%
\$100,000 - \$149,999	16%	20%	20%	21%	21%
\$100,000+	24%	33%	33%	35%	35%
\$150,000+	8%	13%	14%	14%	14%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 34, 35,36, 37. ¹ Labour force participant" includes working full time, part time and self-employed. ²Male or female head of household. ³Note: 2005 household incomes have been re-percentage on total stating an income (US\$).

Generally, household incomes for Americans who come to Canada on overnight pleasure trips are higher than those of U.S. pleasure travellers as a whole (any destination). In this context, Group Tourists represent the full range of household incomes, with about one-third claiming incomes under \$60,000, about one-third in the \$60,000 to under \$100,000 bracket, and the same proportion in the more affluent \$100,000+ bracket.

The income distributions of Group Tourists, Group Learning Tourists and All Learning Tourists are almost identical.

2. Lifestage

Consistent with their ages, members of the Group Tourist market are predominantly older parents and working or retired older couples. The latter group – retired older couples – is much more characteristic of Group Tourists (22%) than of the typical American overnight pleasure traveller to Canada (13%).

A pattern very similar to Group Tourists is evident for the learning sub-set of this market. In contrast, the more generic All Learning Tourist segment closely parallels Canada's typical visitor from the U.S. in terms of stage in the life cycle.

TABLE 9: HOUSEHOLD CHARACTERISTICS

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location	Any Province/Territory	Group Tourists	Group Learning Tourists	All Learning Tourists
Unweighted base (45,697)		(6,771)	(1,530)	(742)	(2,454)
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
HOUSEHOLD SIZE					
1 person	12%	13%	16%	19%	16%
2 people	34%	41%	47%	47%	42%
3 person	19%	18%	15%	12%	16%
4 people	20%	17%	13%	13%	15%
5+ people	14%	11%	10%	9%	10%
Average (all ages)	3.0	2.8	2.6	2.5	2.7
LIFESTAGE¹					
Young singles	3%	3%	2%	1%	4%
Middle singles	6%	6%	6%	8%	8%
Older singles	3%	4%	8%	9%	5%
Young couple	11%	11%	9%	10%	10%
Working older couple	13%	16%	18%	14%	16%
Retired older couple	9%	13%	22%	24%	16%
Young parent	13%	9%	3%	2%	6%
Middle parent	11%	8%	6%	5%	6%
Older parent	28%	27%	25%	23%	26%
Any singles	12%	13%	16%	19%	16%
Any couples	34%	40%	48%	48%	42%
Any parents	51%	44%	34%	31%	38%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 39, 41. ¹TNS definitions for these groups are appended to this report. No cross editing with other household composition variables was performed by Research Resolutions.

III. Competitive Destinations

A. Worldwide Destinations for Overnight Pleasure Trips

U.S. travellers were asked to identify the destinations of overnight pleasure trips they took over a two-year period. One of the first things to note about responses to this question is that 2-in-3 overnight pleasure travellers to *any destination* have taken such trips **only within the U.S.** in the past couple of years. Put another way, Canada is an **unlikely** destination choice for about 111.0 million American travellers, irrespective of whether they are seeking organized group tours or independent pleasure travel (FIT).

Of the 1-in-8 American overnight pleasure tourists with recent trips to Canada, 2-in-5 have taken trips to locations other than Canada and the U.S. (42%), with Mexico, the Caribbean and Europe being the most popular competitive destinations. These same destinations are particularly popular among Group Tourists, making for stiff competition with other foreign destinations. Three-in-five of Canada's Group Tourists travel to destinations outside the U.S. and Canada for overnight pleasure trips (61%), and an even higher proportion of Group Learning Tourists do so (69%).

TABLE 10: COMPETITIVE DESTINATIONS*

	American Overnight Pleasure Travellers With Destinations in . . .				
		Canada		Group Learning Tourists	All Learning Tourists
	Any Location	Province/Territory	Group Tourists		
Unweighted base	(45,697)	(6,771)	(1,530)	(742)	(2,454)
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Canada	13%	100%	100%	100%	100%
USA					
Any USA	98%	98%	99%	99%	99%
Only USA	67%	-	-	-	-
Other Countries (NET)	26%	42%	61%	69%	51%
Mexico	11%	19%	30%	31%	22%
South/Central America	3%	6%	13%	19%	10%
Caribbean	11%	20%	29%	30%	22%
Europe	7%	16%	29%	38%	25%
Australia/New Zealand	1%	2%	5%	7%	4%
Asia	2%	5%	10%	12%	8%
Africa	1%	2%	4%	6%	3%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 page 47. *Locations visited on overnight pleasure trip, past two years.

Apart from the U.S., the primary foreign competition within the Group Tourist market comes from Mexico (30%), the Caribbean (29%) and Europe (29%). At least one-tenth of these tourists also venture to destinations in South/Central America and Asia.

Any Learning Tourists resemble the Group Tourist market in terms of destination choices but at a lower level of intensity. About half of these learning-oriented travellers claim to have been to destinations outside Canada and the U.S. in the past couple of years. As noted previously, the penchant for worldwide travel among Group Learning Tourists and the more generic learning market is consistent with these tourists' stated interest in gaining *knowledge of history, other cultures or other places* when travelling.

B. Canadian Destinations

As noted in the initial chapter of this report, different parts of Canada have different levels of appeal to Group Tourists. One way to look at “appeal” is in terms of sheer numbers of visitors. From this vantage point, Ontario emerges as the clear winner, with over half of all Group Tourists who have been to Canada recently claiming to have made a recent overnight pleasure trip to this province. From this volumetric perspective, Manitoba/Saskatchewan, Yukon and NWT would be the clear losers. An alternative way to look at this information is to index a destination’s ability to attract a particular market segment relative to its share of *typical* U.S. overnight pleasure tourists (all).

TABLE 11: CANADIAN DESTINATIONS*

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location	Province/Territory	Group Tourists	Group Learning Tourists	All Learning Tourists
Unweighted base	(45,697)	(6,771)	(1,530)	(742)	(2,454)
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Atlantic Canada	2%	12%	19%	24%	15%
Newfoundland/Labrador	**	2%	4%	7%	4%
PEI	1%	4%	9%	11%	6%
New Brunswick	1%	5%	9%	12%	8%
Nova Scotia	1%	10%	15%	18%	12%
Quebec	3%	20%	24%	28%	24%
Ontario	7%	57%	54%	54%	56%
Man/Sask	1%	5%	6%	7%	6%
Manitoba	**	3%	4%	5%	4%
Saskatchewan	**	3%	5%	5%	4%
Western Canada	4%	30%	38%	37%	35%
Alberta	1%	7%	10%	10%	9%
British Columbia	3%	26%	32%	32%	31%
Yukon	**	3%	7%	8%	4%
Northwest Territories	**	2%	4%	3%	2%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 page 46. *Locations visited on overnight pleasure trip, past two years. **Less than 0.5%. Nunavut is not shown because of very small numbers.

In this type of index, 100 is the baseline, representing the destination’s share of all U.S. overnight pleasure travellers. A destination’s relative success with a particular market is evident in the extent to which its index score is greater than 100. Conversely, its relative weakness is evident in the extent to which score is less than 100 (see Table 12, following page for figures).

Using this index, Newfoundland and Labrador, Prince Edward Island and the Yukon seem to have particular appeal to Group Tourists and Group Learning Tourists, despite their comparatively low volumes of American overnight pleasure tourists. In

contrast, Ontario, with its very sizeable U.S. visitor volume, seems to under-perform in the Group Tour/Learning Tour markets.

As an aside, interest in Alaska as a destination for Americans likely contributes to the Yukon's strong showing within the Group Tour market (see popular U.S. destinations, next section).

TABLE 12: INDEX¹ OF CANADIAN DESTINATIONS²

	Niche Market Share Relative to Total Pleasure Market Share		
	Group Tourists	Group Learning Tourists	Learning Tourists (Any)
> 100 = over-performance relative to all U.S. Pleasure Travellers to destination			
< 100 = under-performance			
Atlantic Canada	158	200	125
Newfoundland/Labrador	200	350	200
PEI	225	275	150
New Brunswick	180	240	160
Nova Scotia	150	180	120
Quebec	120	140	120
Ontario	95	95	98
Man/Sask	120	140	120
Manitoba	133	167	133
Saskatchewan	167	167	133
Western Canada	127	123	117
Alberta	143	143	129
British Columbia	123	123	119
Yukon	233	267	133
Northwest Territories	200	150	100

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1, special calculations based on page 46. ¹Index represents a destination's ability to attract typical U.S. overnight pleasure tourists and those in a particular market segment [niche share/total share * 100].

²Locations visited on overnight pleasure trip, past two years. Nunavut is not shown because of very small numbers.

C. Out-of-State U.S. Pleasure Travel Destinations

To identify key competitive destinations *within* the U.S., this analysis focuses on **out-of-state** overnight pleasure travel by Americans. Information on visitation by Americans to *all* states, including their “home state” can be found in the detailed tabulations.¹²

TABLE 13: OUT-OF-STATE U.S. DESTINATIONS* (Excluding “Own State”)

	American Overnight Pleasure Travellers With Destinations in . . .				
		Canada			
	Any Location (45,697)	Any Province/Territory (6,771)	Group Tourists (1,530)	Group Learning Tourists (742)	All Learning Tourists (2,454)
Unweighted base	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Weighted, Projected					
Sun/Sea States (S)	54%	65%	74%	76%	68%
<i>In rank order by Group Tourists</i>					
Florida (S)	23%	32%	38%	40%	34%
New York State	11%	24%	28%	34%	29%
California (S)	13%	22%	27%	33%	26%
Pennsylvania	9%	17%	23%	26%	21%
Alaska	3%	12%	22%	22%	14%
Nevada (S)	14%	18%	22%	23%	19%
Washington DC	7%	14%	20%	23%	19%
Arizona (S)	9%	15%	19%	20%	17%
Massachusetts	6%	14%	18%	22%	18%
Illinois	8%	14%	17%	18%	17%
Georgia	8%	11%	16%	17%	13%
Virginia	7%	11%	16%	15%	13%
Hawaii (S)	6%	10%	15%	17%	13%
Maryland	6%	11%	15%	19%	14%
Colorado	7%	12%	14%	17%	15%
Other Sun/Sea States					
South Carolina (S)	7%	9%	12%	13%	10%
Texas (S)	7%	10%	12%	13%	11%
New Mexico (S)	4%	6%	9%	11%	9%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 page 48. *Out-of-state locations visited on overnight pleasure trip, past two years.

No matter what a Canadian destination does in terms of product development or marketing, it is unlikely to compete successfully with U.S. domestic *sun/sea* destinations of choice for the majority of U.S. Group Tourists with recent pleasure trips in Canada. Three-quarters of these tourists have left their “home state” to travel to a

¹² See Volume 1, Table 47.

U.S. sun/sea destination for an overnight pleasure trip in the past two years. Led by **Florida, California** and **Nevada**, sun/sea states are popular with *all* U.S. pleasure travellers but are especially so among Group and Group Learning Tourists. As noted previously, foreign sun/sea destinations such as Mexico and the Caribbean also have strong appeal to Group Tourists who have visited Canada recently.

- The strong lure of sun/sea destinations among Group Tourists is supported by the sizeable number of these travellers who identify *sunbathing or sitting on a beach* and/or *swimming in oceans* as the “main reason” for some of their overnight trips in the past couple of years (see sections on “main reason” trip activities).
- Interest in sun/sea destinations among U.S. Group Tourists may also contribute to the special popularity of Atlantic Canada within this niche market.

Three comparatively popular states emerge as current or potential partners for “cross border” group tours.

- Destinations in Ontario and/or Quebec might partner with **New York** and **Pennsylvania**.
- The lure of **Alaska** as a U.S. out-of-state pleasure travel destination among Group Tourists is already utilized in cross-border group packages for British Columbia and the Yukon.

D. Destinations: Role & Ratings

1. Importance of Destination

As they say in retail, destination, destination, destination! For most Group Tourists, Group Learning Tourists and Learning Tourists as a whole, the first consideration in planning their most recent summer and/or winter trip was **destination**. These American visitors to Canada also put a premium on destination choice *per se*, with at least 3-in-4 claiming that it is *extremely* or *very important* to them.

It is worth noting that even though they have booked *overnight tours* in the past couple of years, Group Tourists are no more or less likely than the typical visitor to Canada to start their trip planning process with a *vacation experience* in mind. Although comparatively few do so, Group Tourists are, however, more apt to initiate the trip planning process by seeking a *package deal* (6%) than are overnight pleasure tourists to Canada as a whole (3%).

**TABLE 14: CONSIDERATIONS/
IMPORTANCE OF DESTINATION**

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location (45,697) 166.0 million	Province/ Territory (6,771) 20.8 million	Group Tourists (1,530) 5.3 million	Group Learning Tourists (742) 2.7 million	All Learning Tourists (2,454) 7.8 million
Unweighted base					
Weighted, Projected					
First Consideration for Most Recent Summer/Winter Trip (NET)*					
Start with destination	62%	67%	66%	68%	69%
Start with activities	13%	17%	16%	13%	14%
Start with type of vacation experience	20%	21%	20%	21%	20%
Look for package deal	2%	3%	6%	6%	3%
Importance of Destination					
Extremely/Very Important	67%	70%	75%	83%	79%
Extremely important	29%	30%	33%	42%	40%
Very important	39%	40%	42%	40%	39%
Average**	3.9	3.9	4.1	4.2	4.2

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 22, 24. *Based on respondents who reported taking a summer and/or winter overnight pleasure trip in past two years. **Average based on assigned values of 5 for "extremely important" to 1 for "not at all important". Averages are calculated only on those volunteering an opinion. Percentages for "first consideration" do not add to 100% because not all response categories are shown.

2. Importance of Conditions in Destination Choice

Overnight pleasure travellers were asked to rate a variety of “conditions” in terms of their importance in making a destination choice. A three-point semantic scale was used.¹³

Group Tourists, Group Learning Tourists and the more broadly defined All Learning Tourists are very similar to American overnight pleasure travellers in general and those who have come to Canada in the past couple of years in terms of the conditions they accord *high importance*. Like other American tourists, group and learning tourists put *feeling safe* at the top of their list. Canada, with its image of being a safe destination, should benefit from the high priority given this condition.

About half of Group Tourists also want a destination with **many things for adults to see and do**. The importance of activities for adults is especially prevalent among Group Learning Tourists and All Learning Tourists. The priority associated with *adult* activities and the corresponding disinterest in activities for *children* reflect the fact that many members of these niche markets live in adult-only households and, more likely than not, are travelling in adult-only parties.

Summary: Considerations Deemed *Highly Important* By At Least 1-in-3 Group Tourists¹⁴

	Group Tourists	Group Learning Tourists	All Learning Tourists
Feeling safe	71%	71%	70%
Lots for adults to see/do	55%	65%	62%
No health concerns	45%	46%	42%
Mid-range accommodation	38%	43%	40%
Convenient access by car	37%	42%	46%
Direct access by air	36%	44%	37%

Availability of **mid-range lodging** and convenient **access by car** are also important considerations in a destination choice for about two-fifths of the group/learning markets. **Direct air access** is deemed a highly important consideration by a noteworthy minority of Group Tourists (36%), Group Learning Tourists (44%) and All Learning Tourists (37%). Meeting this need for Group Tourists and particularly those in the Learning segment of this market may pose challenges for the Canadian

¹³ “Highly important”, “Somewhat important”, and “Of no importance”.

¹⁴ See Table 15 for full array of considerations deemed “highly important” and “of no importance”.

destinations in which air access has posed a persistent concern since the restructuring of airline service in Canada.

Not surprisingly, group and learning tourists are considerably more likely than U.S. overnight pleasure travellers to Canada as a whole to attach high importance to experiencing a **culture very different from their own**. It is, however, somewhat surprising to find that these niche tourists are no more likely than are U.S. overnight pleasure travellers and those with recent trips in Canada to attach high importance to the availability of **low cost packages** as a consideration in destination selection (see Table 15 on the following page for figures).

TABLE 15: CONDITIONS FOR
SELECTING A DESTINATION

	American Overnight Pleasure Travellers With Destinations in . . .				
		Canada			
	Any Location (45,697)	Any Province/ Territory (6,771)	Group Tourists (1,530)	Group Learning Tourists (742)	All Learning Tourists (2,454)
Unweighted base	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Weighted, Projected					
<i>Bold rows are proportion stating "Highly Important"</i>					
No health concerns	43%	41%	45%	46%	42%
Of no importance	14%	15%	11%	10%	14%
Feeling safe	73%	69%	71%	71%	70%
Of no importance	2%	3%	2%	2%	3%
Familiar with culture & language	23%	17%	18%	17%	18%
Of no importance	17%	20%	23%	25%	22%
Very different culture than own	8%	10%	16%	25%	20%
Of no importance	48%	39%	31%	22%	24%
Have friends or relatives there	14%	10%	10%	10%	9%
Of no importance	55%	61%	65%	65%	63%
Low cost packages available	32%	27%	29%	30%	28%
Of no importance	18%	21%	18%	17%	22%
Disabled-person-friendly	9%	8%	10%	10%	10%
Of no importance	71%	75%	68%	68%	72%
Lots for children to see/do	20%	13%	10%	11%	14%
Of no importance	55%	65%	71%	71%	68%
Lots for adults to see/do	48%	49%	55%	65%	62%
Of no importance	5%	5%	3%	3%	3%
Information available on internet	28%	28%	24%	29%	32%
Of no importance	24%	23%	25%	22%	21%
Great shopping	16%	14%	15%	18%	17%
Of no importance	36%	40%	38%	37%	39%
Luxury accommodation	9%	9%	11%	12%	12%
Of no importance	54%	51%	45%	42%	47%
Mid-range accommodation	33%	34%	38%	43%	40%
Of no importance	13%	11%	7%	6%	10%
Budget accommodation	29%	25%	21%	25%	29%
Of no importance	21%	24%	26%	25%	24%
Camping	8%	9%	7%	7%	10%
Of no importance	65%	65%	69%	68%	63%
Convenient access by car	51%	43%	37%	42%	46%
Of no importance	7%	9%	13%	14%	11%
Direct access by air	26%	30%	36%	44%	37%
Of no importance	25%	18%	15%	14%	17%
Convenient access by train/bus	8%	10%	16%	22%	15%
Of no importance	54%	48%	39%	33%	39%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 page 25. **Bold rows** are proportion stating "Highly Important".

3. Appeal of Various Destinations

Two image questions associated with specific destinations were included in the TAMS study. One of these asked travellers to use a ten-point bi-polar rating scale ranging from *very appealing* (10) to *very unappealing* (1) to assess each destination's appeal for a pleasure trip.¹⁵ Many of Canada's potential tourists in the U.S. refrained from offering opinions about the Canadian destinations included in this question, presumably because they did not have sufficient information about the destination to form a clear image.

As the top rated destination, Hawaii may have considerable *appeal* but only about 1-in-20 U.S. overnight pleasure travellers (any destination) claim to have gone to Hawaii in the past couple of years (6%). Hawaii's **low recent travel incidence** and **high appeal** may be instructive for Canadian destinations. For Hawaii, a favourable *image* does not appear to require first-hand knowledge of the destination.

Group Tourists, Group Learning Tourists and All Learning Tourists rate two Canadian provinces within the top five destinations for "appeal". These are British Columbia and Ontario. While British Columbia does not have as much appeal as Hawaii, it is about on par with California among Group and Group Learning Tourists and is rated as more appealing than California by All Learning Travellers.

Summary: Five Highest Appeal Destinations among Group Tourists¹⁶

	Group <u>Tourists</u>	Group Learning <u>Tourists</u>	All Learning <u>Tourists</u>
Hawaii	8.5	8.6	8.4
California	7.7	7.9	7.7
British Columbia	7.6	8.1	8.1
Colorado	7.5	7.8	7.7
Ontario	7.4	7.7	7.8

For Canada's provinces and territories, ratings by Americans who have *recently travelled in Canada* are significantly higher than they are among American pleasure travellers in general. In turn, ratings take a further leap among tourists who have had *direct experience with a particular Canadian destination*, as exemplified in ratings displayed in the following table.

¹⁵ The second question associated with reasons to travel to a destination is discussed in the following chapter.

¹⁶ See Table 16 for full array of average ratings and proportion unable/unwilling to rate each destination.

The Yukon example: a Group Tourist to any location in Canada accords the Yukon a significantly higher appeal rating (6.3) than do all American Group Tourists (5.6), most of whom have not visited Canada recently. If the U.S. Group Tourist has actually travelled in the Yukon recently, an even more dramatic increase is evident, increasing from 5.6 among all U.S. Group Tourists through 6.3 for those who have recent travel experience anywhere in Canada to 8.3. Among its recent Group Tour visitors, the Yukon achieves an appeal rating *on par* with Hawaii!

Impact of Direct Experience with a Destination on its Appeal

	American Group Tourists to . . . Destination		
	Any	Canada	Province/Territory
Yukon	5.6	6.3	8.3
British Columbia	6.8	7.6	8.5
Alberta	5.8	6.5	8.3
Manitoba	5.1	5.8	7.4*
Newfoundland & Labrador	5.3	6.1	8.4
Prince Edward Island	6.1	6.9	8.4
New Brunswick	5.5	6.3	8.2
Nova Scotia	6.1	7.0	8.2

*Specific Province/Territory ratings by Group Tourists who visited Manitoba or Saskatchewan in past two years. Source: TAMS U.S. Special Tabulations, Research Resolutions, Volumes 1, 2, 3, page 26. Average ratings calculated using a ten-point bi-polar rating scale ranging from very appealing (10) to very unappealing (1). Averages are calculated on those volunteering a rating only.

A similar pattern is evident for all other Canadian destinations. The contrast between ratings of Hawaii and Canadian provinces and territories suggests that the *images* of Canadian destinations are **not** sufficiently strong to generate market enthusiasm without the benefit of direct experience with Canada and/or its provinces and territories.

TABLE 16: APPEAL OF VARIOUS DESTINATIONS

	American Overnight Pleasure Travellers With Destinations in . . .				
		Canada		Group Learning	All Learning
	Any Location	Any Province/ Territory	Group Tourists	Tourists	Tourists
Unweighted base Weighted, Projected	(45,697) 166.0 million	(6,771) 20.8 million	(1,530) 5.3 million	(742) 2.7 million	(2,454) 7.8 million
<i>Bold rows are average ratings*.</i>					
Newfoundland & Labrador	4.8	5.8	6.1	6.6	6.5
No rating provided	42%	34%	29%	29%	29%
Nova Scotia	5.5	6.7	7.0	7.4	7.3
No rating provided	35%	26%	19%	18%	21%
New Brunswick	4.9	6.1	6.3	6.8	6.7
No rating provided	43%	35%	28%	26%	30%
Prince Edward Island	5.6	6.7	6.9	7.4	7.4
No rating provided	38%	29%	24%	23%	25%
Quebec	5.8	6.9	7.1	7.5	7.5
No rating provided	28%	17%	13%	11%	13%
Ontario	6.1	7.4	7.4	7.7	7.8
No rating provided	25%	11%	10%	10%	11%
Manitoba	4.7	5.6	5.8	6.2	6.1
No rating provided	43%	37%	32%	31%	33%
Saskatchewan	4.8	5.5	5.8	6.2	6.1
No rating provided	42%	36%	31%	30%	32%
Alberta	5.2	6.2	6.5	7.0	6.9
No rating provided	38%	31%	26%	24%	27%
British Columbia	6.2	7.5	7.6	8.1	8.1
No rating provided	31%	21%	18%	17%	17%
Yukon	5.1	5.9	6.3	6.7	6.5
No rating provided	37%	31%	27%	27%	27%
Northwest Territories	5.1	5.8	6.1	6.4	6.3
No rating provided	36%	32%	28%	29%	29%
New York State	6.6	7.1	7.2	7.7	7.5
No rating provided	10%	7%	6%	5%	7%
Colorado	7.1	7.4	7.5	7.8	7.7
No rating provided	11%	11%	10%	11%	10%
Florida	7.3	7.2	7.3	7.3	7.1
No rating provided	6%	5%	4%	4%	5%
California	7.3	7.5	7.7	7.9	7.7
No rating provided	7%	6%	5%	5%	5%
Hawaii	8.4	8.4	8.5	8.6	8.4
No rating provided	8%	8%	7%	7%	8%
Arizona	6.6	7.0	7.2	7.3	7.2
No rating provided	10%	9%	8%	8%	8%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 page 26. **Bold rows** are average ratings calculated using a ten-point bi-polar rating scale ranging from very appealing (10) to very unappealing (1). Averages are calculated on those volunteering a rating only.

4. Number of Good Reasons to Visit Various Destinations

Consumers were asked to indicate which of three statements best described their feelings about taking a pleasure trip to the same destinations for which they rated *appeal* (see previous section). The statements were *there are NO good reasons to travel to this destination*, *SOME good reasons . . .* and *MANY good reasons to travel to this destination*.

For the most part, the *same* destinations accorded high *appeal* ratings are also the ones that emerge at the top of Canada's Group Tourists' lists for having *many good reasons* to visit on a pleasure trip. Specifically, Hawaii tops the list with about two-thirds stating that there are many good reasons to go to this tropical destination, followed at a considerable distance by California, Florida, New York and Colorado.

Among Group Tourists, no Canadian province or territory is thought to offer *many* good reasons for a pleasure trip by a majority. Within the learning portion of the group segment and among All Learning Tourists, however, British Columbia is considered to have many reasons to visit by at least 1-in-2.

Summary: Destinations With At Least One-Half Saying *Many Good Reasons to Visit* (in rank order within each category)¹⁷

<u>Group Tourists</u>	<u>Group Learning Tourists</u>	<u>All Learning Tourists</u>
Hawaii	Hawaii	Hawaii
California	California	California
Florida	New York State	New York State
	Florida	Colorado
	Colorado	British Columbia
	British Columbia	Florida

It is noteworthy that the only three destinations included in the survey thought to provide many good reasons to travel for the U.S. Group Tourist market with recent Canadian experience are **sun/sea** destinations. It is also noteworthy that a majority of the U.S. Group Tourist market could agree on only three destinations to accord "many good reasons" status. Would there have been more consensus among these Group Tourists who have recently been to a *foreign country* – Canada – had the list included destinations outside Canada and the U.S.A.?

¹⁷ See Table 17 for the full array of ratings.

TABLE 17: APPEAL OF VARIOUS DESTINATIONS

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location (45,697) 166.0 million	Any Province/ Territory (6,771) 20.8 million	Group Tourists (1,530) 5.3 million	Group Learning Tourists (742) 2.7 million	All Learning Tourists (2,454) 7.8 million
Newfoundland & Labrador	8%	14%	17%	24%	22%
Nova Scotia	13%	25%	32%	41%	35%
New Brunswick	7%	15%	19%	27%	23%
Prince Edward Island	13%	23%	27%	35%	33%
Quebec	18%	34%	37%	49%	46%
Ontario	20%	42%	41%	47%	49%
Manitoba	5%	9%	12%	16%	13%
Saskatchewan	6%	9%	11%	14%	13%
Alberta	10%	18%	21%	26%	26%
British Columbia	21%	40%	43%	50%	52%
Yukon	11%	17%	21%	26%	23%
Northwest Territories	11%	16%	19%	23%	21%
New York State	40%	48%	49%	56%	56%
Colorado	41%	45%	48%	54%	52%
Florida	54%	52%	54%	55%	51%
California	53%	56%	57%	59%	59%
Hawaii	67%	68%	70%	72%	70%
Arizona	31%	35%	38%	42%	40%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 page 27. Proportions are those stating MANY good reasons to visit.

IV. Activities That Motivate Overnight Trips

A. Introduction

The 2006 TAMS questionnaire included approximately 190 activities a person may have engaged in while on a trip. In addition to capturing *incidence* of participation in this array of activities, the study asks consumers to indicate whether an activity they engaged in on *any* overnight trip in the past two years was a *main reason for taking any of these trips*.¹⁸

Not Necessarily in Canada

TAMS 2006 provides two important but independent measures - where tourists went and what tourists did. Even though the tourists singled out for special scrutiny in this report claim to have taken an overnight pleasure trip to a Canadian destination in the past two years, the activities that motivated their recent overnight trips (any purpose) are **not** linked to their Canadian destination(s). Thus, a trip prompted by interest in going to a casino could have been to Gatineau, Orillia, Montréal, Las Vegas or Monte Carlo. Similarly, the park for a camping experience could have been Waterton Lakes, Riding Mountain, Banff, Death Valley, Grand Canyon, or any other park in the world; a winery could have been in the Okanagan Valley, Napa, Niagara or Bordeaux.

New Categories for Analysis

The survey form presents activities in sections with general headings. New aggregates have been developed for this analysis. These new groups represent an attempt to create meaningful units of information for product development and marketing purposes. For example, a "Cultural/Learning Activities & Events" category has been created that includes activities such as *international film festivals* and *literary festivals or events*. It was felt that these activities were more closely aligned with *live theatre*, and *classical concerts* than with carnivals and comedy festivals. These latter festivals are included in a fairs/festivals sub-group nested within the broader "Theme/Amusement Parks/ Other Entertainment/Events" group.

¹⁸ Presumably, "these trips" are those on which the specific activity took place.

The major categories used in this report are listed below.¹⁹ A list of intermediate and sub-group activities within each category is appended.

- Participatory Outdoor Activities
- Cultural/Learning Activities & Events
- Theme/Amusement Parks/Other Entertainment/ Events
- Food & Wine
- Cultural/Learning Activities & Events
- Lodging
- Shopping
- Spectator Sports
- Team Sports, Tournaments, Games

Focus on “Main Activity”

For packaging and promotional purposes, tourism planners and marketers need to be able to identify *activity themes* that motivate an overnight pleasure traveller to select one type of group tour or learning travel experience over another. For this reason, the information presented here identifies the relative popularity of activities or activity groups as *trip motivators*. In other words, only information on activities that were the “main reason” a trip was taken is presented here. Information about “any” participation in the full range of activities covered in the TAMS questionnaire is included in the detailed tabulations (under separate cover).

¹⁹ Note: all activities in the TAMS questionnaire have been included in the detailed tabulations but are not necessarily referred to in this report.

B. Activity-Based Trip Motivators

1. Major Category Motivators

Group and learning-oriented tourists, like *all* tourists, have varied interests. They are not readily pigeon-holed into a single type of trip or a single set of activities. There is, in fact, considerable overlap or duplication in Group and Learning Tourists' activity-based trip motivations.

- About six-in-ten Group Tourists have taken overnight trips motivated by **nature or outdoor activities**;
- Six-in-ten took trips in order to go to theme parks or other **entertainment activities** including casinos;
- The same proportion took trips motivated by **culture and learning-oriented activities** such as museums, art galleries, or performances, hands-on learning experiences and Aboriginal culture;
- About one-third of U.S. Group Tourists have recently taken trips for a wilderness lodge, resort, or spa experience (**Lodging**);
- About one-quarter have been motivated by their **culinary or wine** interests;
- Close to one-quarter of these American tourists have been motivated to take an overnight trip in order to attend a **sporting event**.
- **Shopping**, while a very popular trip activity, does not tend to be a trip driver for Group Tourists.

At this high level of activity aggregation, Group Tourists, Group Learning Tourists and All Learning Tourists have trip motivations that are very similar to one another and to the typical American overnight pleasure tourist who has recently taken a trip in Canada. There are, however, some significant variations.

- The group/learning niche markets are more likely than the typical U.S. overnight pleasure traveller to Canada to be motivated by **cultural and/or learning activities** (36%). This penchant for culture/learning is, not surprisingly, most prevalent in the Group Learning Tourist segment (58%).

- Similarly, interests in **food and wine** are more likely to drive trips by Group Tourists (27%) and Group Learning Tourists (31%) than is the case among all Americans who come to Canada for overnight pleasure trips (20%).
- And, while not as prominent a trip driver as outdoor, entertainment and/or cultural activities, about 1-in-5 Group Learning Tourists claim to have taken trips motivated by **shopping**, compared to about 1-in-10 typical American tourists to Canada.

TABLE 18: ACTIVITY MOTIVATORS – MAJOR CATEGORY OVERVIEW

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location	Any Province/ Territory	Group Tourists	Group Learning Tourists	All Learning Tourists
Unweighted base (45,697)		(6,771)	(1,530)	(742)	(2,454)
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Participatory Outdoor Activities	45%	57%	60%	61%	59%
Cultural/Learning Activities & Events	23%	36%	49%	58%	49%
Theme/Amusement Parks/Other	42%	47%	50%	50%	50%
Entertainment/Events					
Food & Wine	13%	20%	27%	31%	25%
Lodging	21%	29%	33%	37%	32%
Shopping	9%	11%	16%	19%	15%
Spectator Sports	14%	20%	23%	24%	22%
Team Sports, Tournaments, Games	6%	9%	11%	12%	8%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 7, 8, 9, 10, 11.

2. Intermediate Category Motivators

a) Participatory Outdoor Activities

Participatory outdoor activity-based motivators for Group Tourists are very similar to those of all American overnight pleasure tourists with recent trips to Canada. Popular **water-based** outdoor trip drivers involve relatively *soft* interactions with the outdoors – **sunbathing, swimming in oceans and fishing**.

Similarly, the most popular **land-based** outdoor trip driver is *passive*: **flora and fauna viewing**. Among observers of plants and animals, *whale watching* and *land animal viewing* are the most commonly named as the *reason* an overnight trip was taken. Going to a **nature park** (national/provincial/ state) motivates overnight trips for about one-fifth of Group Tourists and those in the learning segments. **Camping**, particularly in a public campground of a national or provincial park, motivates trips for about 1-in-7 Group Tourists and Group Learning Tourists.

Of the various **winter activities** that might motivate overnight trips for Group Tourists and the learning segments, *alpine skiing* is the most popular, by far. About one-tenth of tourists in each of these markets claim that they have taken trips over the past two years with alpine skiing as the main reason.

Note to Readers

All intermediate activity categories that are *main reasons* for a trip **by at least 1-in-10** Group Tourists are displayed in summary tables in the Intermediate Category Motivator sections of this report.

For the full list of individual activities as main reasons and all activities engaged in on a recent overnight trip (*any participation*), see detailed tabulations (under separate cover).

TABLE 19: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location (45,697) 166.0 million	Any Province/ Territory (6,771) 20.8 million	Group Tourists (1,530) 5.3 million	Group Learning Tourists (742) 2.7 million	All Learning Tourists (2,454) 7.8 million
Unweighted base Weighted, Projected					
Participatory Outdoor Activities	45%	57%	60%	61%	59%
Outdoor Water Based Activities	30%	39%	42%	42%	37%
Fishing	8%	11%	11%	11%	10%
Diving/Snorkelling	3%	5%	8%	10%	6%
Sunbathing at beach	13%	15%	16%	15%	13%
Swimming in oceans	9%	10%	12%	14%	11%
Outdoor Winter Activities	8%	15%	17%	18%	15%
Alpine skiing	6%	10%	11%	13%	10%
Outdoor Land Based Activities	30%	41%	46%	48%	46%
Flora/Fauna Viewing	5%	11%	16%	19%	14%
Nature park	10%	17%	19%	20%	23%
Camping	10%	12%	14%	15%	13%
Cultural/Learning Activities & Events	23%	36%	49%	58%	49%
Theme/Amusement Parks/Other Entertainment/Events	42%	47%	50%	50%	50%
Food & Wine	13%	20%	27%	31%	25%
Lodging	21%	29%	33%	37%	32%
Shopping	9%	11%	16%	19%	15%
Spectator Sports	14%	20%	23%	24%	22%
Team Sports, Tournaments, Games	6%	9%	11%	12%	8%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 7, 8, 9, 10, 11.

b) Cultural/Learning Activities & Events

Group Tourists, All Learning Tourists and especially Group Learning Tourists are more likely to take trips in order to experience a wide variety of cultural or learning activities than are Americans who have recently taken an overnight pleasure trip to Canada.

For example, those in the Group Learning Tourist segment are about twice as likely as the typical American visitor to Canada to have taken a trip driven by an interest in each of the following: **museums, historic sites and buildings, art galleries, classical or other music performances, live theatre and/or Aboriginal culture.**

TABLE 20: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location (45,697) 166.0 million	Province/ Territory (6,771) 20.8 million	Group Tourists (1,530) 5.3 million	Group Learning Tourists (742) 2.7 million	All Learning Tourists (2,454) 7.8 million
Participatory Outdoor Activities	45%	57%	60%	61%	59%
Cultural/Learning Activities & Events	23%	36%	49%	58%	49%
Aboriginal Culture/Events	3%	5%	9%	12%	9%
Performing Arts	7%	13%	19%	24%	19%
Classical Concerts, Jazz, Opera	3%	6%	10%	15%	11%
Live theatre	4%	9%	13%	16%	11%
Cultural Festivals/Events	4%	7%	11%	14%	10%
Exhibits, Architecture, Historic Sites/Buildings & Museums	14%	23%	33%	41%	33%
Art galleries	3%	6%	10%	13%	10%
Historic sites, Buildings	11%	17%	25%	33%	27%
Museums	7%	11%	17%	22%	17%
Strolling Around a City to Observe Architecture	7%	12%	18%	23%	18%
Hands on Learning Activities	3%	7%	11%	13%	10%
Theme/Amusement Parks/Other Entertainment/Events	42%	47%	50%	50%	50%
Food & Wine	13%	20%	27%	31%	25%
Lodging	21%	29%	33%	37%	32%
Shopping	9%	11%	16%	19%	15%
Spectator Sports	14%	20%	23%	24%	22%
Team Sports, Tournaments, Games	6%	9%	11%	12%	8%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 7, 8, 9, 10, 11.

- Both *well-known historic sites or buildings* and *other historic sites, monuments and buildings* are travel drivers for approximately 2-in-10 Group Learning Tourists and about 1-in-7 All Learning Tourists. Of the variety of museums covered in the study, **general history** and **science/technology museums** are the most common trip drivers within the group/learning markets.
- Simply **strolling around a city** to observe its buildings and architecture motivates trips for almost 2-in-10 group and learning tourists.
- **Music festivals** are more commonly named as trip motivators than are international film, literary or theatre festivals by group/learning travellers.
- Each of the **hands-on learning experiences** included in the survey represents a very small niche sub-market among group and learning tourists. The most widely mentioned is cooking/wine-tasting courses.

c) Entertainment Activities & Events

In terms of the entertainment activities that motivate recent overnight travel, U.S. tourists in the group and learning market segments closely resemble Americans as a whole that have recently taken an overnight pleasure trip to Canada. Group and Learning Tourists are, however, more apt to take trips in order to visit **botanical gardens, zoos and aquariums** than are typical American tourists to Canada.

- Popular *fairs and festivals* include those dedicated to **food and drink** and **fireworks displays**.
- **Casinos** and **amusement parks** are also important motivators for Group Tourists and Group Learning Tourists but are slightly less likely to prompt travel among the more generic learning segment (*All Learning Tourists*).
- No individual *other entertainment* activity such as country/western or popular music concerts, circuses, or dinner theatre emerges as a strong travel motivator.

TABLE 21: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location (45,697)	Province/Territory (6,771)	Group Tourists (1,530)	Group Learning Tourists (742)	All Learning Tourists (2,454)
Unweighted base					
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Participatory Outdoor Activities	45%	57%	60%	61%	59%
Cultural/Learning Activities & Events	23%	36%	49%	58%	49%
Theme/Amusement Parks/Other Entertainment/Events	42%	47%	50%	50%	50%
Fairs/Festivals	14%	19%	22%	26%	24%
Casinos	14%	18%	23%	20%	16%
Theme/Amusement Parks/Movies	22%	25%	29%	30%	26%
Gardens/Aquariums/Zoos/Planetariums	10%	13%	18%	22%	16%
Other Entertainment	14%	19%	24%	26%	22%
Food & Wine	13%	20%	27%	31%	25%
Lodging	21%	29%	33%	37%	32%
Shopping	9%	11%	16%	19%	15%
Spectator Sports	14%	20%	23%	24%	22%
Team Sports, Tournaments, Games	6%	9%	11%	12%	8%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 7, 8, 9, 10, 11.

d) Food & Wine Activities

A sizeable minority of Group Tourists and especially those in the Group Learning segment takes overnight trips in order to experience **local cuisines**, visit **wineries on day trips** and/or to engage in other food or beverage-related activities. These tourists along with All Learning Tourists are more apt to have taken such trips in the past couple of years than are typical American overnight pleasure travellers to Canada.

TABLE 22: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location	Any Province/Territory	Group Tourists	Group Learning Tourists	All Learning Tourists
Unweighted base	(45,697)	(6,771)	(1,530)	(742)	(2,454)
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Participatory Outdoor Activities	45%	57%	60%	61%	59%
Cultural/Learning Activities & Events	23%	36%	49%	58%	49%
Theme/Amusement Parks/Other Entertainment/Events	42%	47%	50%	50%	50%
Food & Wine	13%	20%	27%	31%	25%
Dining	8%	12%	17%	20%	16%
Restaurants with local cuisines	6%	8%	12%	15%	12%
Other Food	4%	7%	12%	16%	11%
Wine/Beer	4%	8%	11%	13%	11%
Day visits to wineries	3%	7%	10%	13%	10%
Lodging	21%	29%	33%	37%	32%
Shopping	9%	11%	16%	19%	15%
Spectator Sports	14%	20%	23%	24%	22%
Team Sports, Tournaments, Games	6%	9%	11%	12%	8%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 7, 8, 9, 10, 11.

e) Lodging Activities

Consistent with their interest in sunbathing and swimming in oceans, Group Tourists and especially those in the Group Learning segment take overnight trips to stay in **seaside resorts**. Seaside resorts are more likely to motivate trips among Group Learning Tourists than they are among typical American overnight pleasure travellers to Canada.

While also a prominent trip motivator among Group Tourists, Group Learning Tourists and All Learning Tourists, **camping** is equally popular among typical American visitors to Canada. Note that camping is also included in *outdoor land-based* activity motivators since for many campers, the experience is as much or more about enjoying the outdoors as it is about lodging. Staying at a **health spa** as a reason for taking a trip is more common among Group and Group Learning Tourists than among American tourists to Canada in total, but remains a comparatively small niche market.²⁰

TABLE 23: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location	Any Province/Territory	Group Tourists	Group Learning Tourists	All Learning Tourists
Unweighted base	(45,697)	(6,771)	(1,530)	(742)	(2,454)
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Participatory Outdoor Activities	45%	57%	60%	61%	59%
Cultural/Learning Activities & Events	23%	36%	49%	58%	49%
Theme/Amusement Parks/Other Entertainment/Events	42%	47%	50%	50%	50%
Lodging	21%	29%	33%	37%	32%
Wilderness/Remote	2%	5%	7%	8%	6%
Resort/Spa	13%	19%	24%	29%	22%
Lake/Riverside Resort	5%	8%	10%	13%	9%
Seaside Resort	7%	10%	14%	18%	13%
Health Spas*	1%	2%	4%	5%	3%
Other Lodging	11%	15%	17%	19%	16%
Camping**	10%	12%	14%	15%	13%
Shopping	9%	11%	16%	19%	15%
Spectator Sports	14%	20%	23%	24%	22%
Team Sports, Tournaments, Games	6%	9%	11%	12%	8%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 7, 8, 9, 10, 11. *Even though they do not meet the 10% threshold for display in the summary tables, health spas are shown here because of the growing importance of this niche market to some regional partners. **Camping is also included in the Net outdoor land-based activity group.

²⁰ Even though they do not meet the 10% threshold for display in the summary tables, health spas are shown here because of the growing importance of this niche market to some regional partners.

V. Trip Planning

A. Who Does the Planning?

By and large, responsibilities for trip planning among the group and learning tourist market segments are the same as those of *all* American overnight pleasure travellers to any destination and those who have recent travel experience in Canada. Specifically, about 8-in-10 consumers who completed the survey claim to have *personal involvement* in trip planning for **all** or **most** trips planned over the past two years.

In most households, the main responsibility for travel planning falls to the individual who completed the survey or is shared with other household members.

TABLE 24: TRAVEL PLANNING	American Overnight Pleasure Travellers With Destinations in . . .				
		Canada			
	Any Location (45,697) 166.0 million	Any Province/ Territory (6,771) 20.8 million	Group Tourists (1,530) 5.3 million	Group Learning Tourists (742) 2.7 million	All Learning Tourists (2,454) 7.8 million
Frequency of personal involvement in trip planning, past 2 years					
All	65%	66%	59%	63%	69%
Most	15%	18%	20%	20%	18%
Some	7%	10%	13%	13%	9%
None/not stated	10%	6%	8%	5%	5%
Main responsibility for trip planning					
Respondent	39%	41%	40%	43%	43%
Spouse/partner	17%	18%	18%	19%	18%
Shared with other household member	25%	26%	23%	24%	25%
Other/not stated	7%	7%	9%	9%	7%
Not involved in travel planning	10%	6%	8%	5%	5%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 16, 17.

B. Travel Information Sources & Travel Media

Of the many sources of travel information available to consumers, the **internet** is the most widely used. It tops the charts for virtually all U.S. overnight pleasure travellers. There are, however, some differences in information sources used for travel planning among group and learning segments and American overnight pleasure travellers to Canada as a whole.

The most salient, though anticipated, difference between Group Tourists and typical American overnight pleasure travellers to Canada is the higher level of reliance on **travel agents** by those who make group bookings. One-half of Group Tourists and Group Learning Tourists rely on travel agents as a source of information, compared to about one-third of All Learning Tourists and somewhat fewer typical American overnight pleasure travellers to Canada.

The learning market, whether Group Learning Tourists or members of the broader learning segment, are also somewhat more apt to use the internet, auto clubs, and official DMO travel guides than are Group Tourists and the U.S. pleasure travel market to Canada as a whole.

Travel information sources capturing the attention of at least one-third of the group/learning segments are listed in rank order below (high to low). The lists reveal a high degree of commonality albeit, with some differences in priorities, and a predisposition on the part of Group Learning Tourists to rely on a larger number of information sources than Group Tourists or All Learning Tourists.

Sources of travel planning information used²¹ by at least one-third of . . .

<u>Group Tourists</u>	<u>Group Learning Tourists</u>	<u>All Learning Tourists</u>
Internet website	Internet website	Internet website
Past experience	Travel agent	Past experience
Travel agent	Past experience	Advice of friends/relatives
Advice of friends/relatives	Advice of friends/relatives	Maps
Maps	Maps	Official DMO travel guides
Official DMO travel guides	Official DMO travel guides	Auto club
Newspaper articles/ads	Newspaper articles/ads	Newspaper articles/ads
Auto club	Auto club	Visitor information centres
	Travel information in mail	
	Travel guide books	

²¹ For full array of responses, see Table 25.

With 7-in-10 Group and Learning tourists relying on the internet for travel planning and 5-in-10 saying that they *normally* visit **travel websites**, the internet has the greatest reach for destinations or travel services.

Other travel media sources of note include the following:

- Half of group/learning tourists claim to watch **televised travel shows** normally;
- About half of Group Learning Tourists say they frequently read the **travel section** in their local newspaper's weekend and/or weekday edition;
- Close to one-third of group and learning travellers say that they read **travel magazines** in a typical month.

These levels of engagement with televised and print travel media are appreciably higher than those evident for Americans who take pleasure trips to Canada as a whole.²²

²² More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover. See Tables 36 – 41.

TABLE 25: INFORMATION SOURCES FOR TRAVEL PLANNING & GENERAL MEDIA HABITS

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location	Any Province/Territory	Group Tourists	Group Learning Tourists	All Learning Tourists
	(45,697)	(6,771)	(1,530)	(742)	(2,454)
	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
SOURCES OF TRAVEL PLANNING INFO					
Travel agent	17%	29%	50%	56%	34%
Internet website	68%	77%	71%	74%	80%
Electronic newsletters via e-mail	5%	9%	12%	16%	13%
Auto club	22%	35%	38%	43%	42%
Any newspaper	20%	32%	39%	44%	40%
Articles	16%	27%	35%	42%	37%
Advertisements	10%	16%	22%	26%	21%
Visitor information centres	18%	27%	29%	34%	36%
Travel guide books	11%	21%	28%	36%	32%
Advice of friends/relatives	41%	49%	48%	53%	52%
Trade, travel, sportsmen's shows	2%	5%	7%	7%	6%
Any television	8%	14%	17%	21%	19%
Programs	6%	12%	16%	19%	17%
Advertisements	4%	5%	8%	9%	7%
Travel information in mail	14%	24%	34%	40%	30%
Past experience	49%	56%	54%	54%	57%
Maps	29%	42%	42%	49%	52%
Official DMO travel guides	18%	33%	39%	46%	44%
TRAVEL MEDIA					
Frequently read newspaper Travel Section					
In weekday editions	16%	28%	41%	48%	37%
In weekend editions	20%	32%	43%	51%	42%
Read Travel Magazines in typical month	11%	21%	32%	37%	29%
Normally watch Travel Shows on TV	29%	41%	53%	59%	51%
Normally visit Travel websites	39%	50%	53%	54%	55%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 18, 28, 29, 30, 32. More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover. See Tables 36 – 41.

C. Internet Use for Travel Inquiries & Bookings

Most American overnight pleasure travellers rely on the internet for travel planning. Over 3-in-4 of those who have recent pleasure travel experience in Canada claim to do so. Use of the web is somewhat lower among Group Tourists (71%) and Learning Group Tourists (68%) than it is among All Learning Tourists (80%) but is, nonetheless, a major travel planning tool for most of these American visitors to Canada.

Regardless of their travel segment, about 2-in-3 American overnight pleasure travellers to Canada who use the internet for travel planning explore travel planning sites such as *Expedia*, closely followed by airlines and hotel/resort sites. Destination marketing organization sites are used by about half of these tourists.

TABLE 26: WEBSITE USAGE FOR TRAVEL PLANNING	American Overnight Pleasure Travellers With Destinations in . . .				
		Canada			
	Any Location (45,697)	Any Province/ Territory (6,771)	Group Tourists (1,530)	Group Learning Tourists (742)	All Learning Tourists (2,454)
Unweighted base Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Used Internet website for travel planning, past 2 years	68%	77%	71%	68%	80%
	(100%)	(100%)	(100%)	(100%)	(100%)
Internet website(s) used (%s based on "Users")					
Travel planning/booking	56%	65%	65%	66%	66%
Airline	46%	56%	62%	65%	61%
Destination marketing organization	35%	48%	48%	56%	56%
Hotel/resort	53%	60%	59%	61%	61%
Motorcoach	1%	2%	4%	4%	3%
Cruise	12%	23%	38%	37%	25%
Attraction	33%	38%	34%	39%	44%
Other	25%	28%	29%	33%	31%
Any Internet Purchases in Past 2 Years (Among All Overnight Pleasure Travellers)	47%	58%	54%	59%	62%
Items Purchased On-Line (%s based on "Purchasers")	(100%)	(100%)	(100%)	(100%)	(100%)
Air tickets	71%	79%	81%	84%	82%
Rail, bus, boat tickets	12%	20%	28%	28%	25%
Accommodation	72%	78%	74%	77%	78%
Tickets for activities/attractions	27%	33%	39%	41%	38%
Car rental	39%	49%	53%	55%	52%
Package deal (2+ items)	18%	25%	33%	35%	30%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 19, 20.

Group Tourists and Group Learning Tourists are more apt to go to cruise sites than are All Learning Tourists and typical American overnight pleasure travellers to Canada. In contrast, learning tourists whether they take group tours or not, are especially likely to click on attraction sites.

Purchase of travel-related goods and services on-line is characteristic of over half of *all* American pleasure travellers who come to Canada. On-line purchases are equally prevalent among Group Tourists, Group Learning Tourists and All Learning Tourists.

As their website preferences would suggest, the most common travel purchases on-line are air tickets, followed by accommodation and car rentals.

VI. Other Travel-Related Information

A. Use of Package Deals

Since most “group tours” are sold as *packages*, it is not surprising that purchase of package deals in the past two years is appreciably more common among Group and Group Learning Tourists than it is among All Learning Tourists or the average U.S. overnight pleasure traveller to Canada. Close to 3-in-4 Group Tourists claim that *most* or *all* of the trips they took in the past two years were “package deals”.

Most Group Tourist buyers want a package to include accommodation, followed by transportation to the destination, tickets for activities and attractions, and transportation at the destination. Somewhat fewer would like the package to include food and beverages.

TABLE 27: PACKAGE DEALS	American Overnight Pleasure Travellers With Destinations in . . .				
		Canada		Group Learning Tourists	All Learning Tourists
	Any Location (45,697)	Any Province/Territory (6,771)	Group Tourists (1,530)	Group Learning Tourists (742)	All Learning Tourists (2,454)
Unweighted base	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Weighted, Projected					
Frequency of Purchasing Packages in Past 2 Years					
Most/all trips	5%	7%	16%	18%	9%
One/some trips	20%	33%	55%	57%	38%
No trips/not stated/not sure	75%	60%	30%	26%	53%
Desired Components of Packages (%s based on “Purchasers of Packages”)	(100%)	(100%)	(100%)	(100%)	(100%)
Transport to destination	21%	35%	62%	67%	42%
Transport at destination	16%	28%	55%	59%	36%
Accommodation	23%	37%	66%	71%	44%
Food and beverage	13%	21%	43%	46%	26%
Tickets for activities/attractions	15%	26%	50%	56%	33%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 page 21.

B. Benefits Sought From Pleasure Travel

Consumers were asked to indicate the importance they attach to a variety of possible *benefits* from pleasure travel using a three-point semantic scale ranging from *no importance* to *highly important*. The figures presented in this section are the proportion of tourists who claim a benefit is *highly important*. The reader is reminded that two of the listed benefits are used to identify learning-oriented travellers:

- To gain knowledge of history, other cultures or other places and/or
- To stimulate your mind/be intellectually challenged.

At the top of the benefit list for Group Tourists and all learning tourists is **seeing and/or doing something new and different**. This attribute is especially important to the *learning* market segments. Clearly, for tourists in group and learning niche markets, a vacation should provide novelty. It should also be the basis for lasting **memories**. By seeing and doing different things, the vacation becomes a **break from the day-to-day** environment. Americans in the learning segments also want a vacation to provide **knowledge about other cultures and places**, be **stimulating** and **enrich their perspectives**.

The benefits of vacations deemed important by Group and Learning Tourists suggest a greater interest in **exploration and novelty** than is found among American overnight pleasure travellers to Canada as a whole. The broader American market for Canada's destinations puts more emphasis on relaxation, enriching family ties and relief from fixed schedules than do Group or Learning travellers.

5 Top *Highly Important* Benefits in Rank Order²³

Overnight Pleasure Tourists To Canada

<u>All</u>	<u>Group</u>	<u>Group Learning</u>	<u>All Learning</u>
Break from day-to-day	New and different	New and different	New and different
Relax/relieve stress	Memories	History, cultures, places	History, cultures, places
Memories	Break from day-to-day	Memories	Memories
Family relationships	Relax/relieve stress	Break from day-to-day	Break from day-to-day
No fixed schedule	Family relationships	Enrich perspectives	Relax/relieve stress

The same benefits are least likely to be deemed *highly important* to American visitors whether or not they engage in group or learning travel. These less sought outcomes of vacations include renewal of non-family personal connections, stories, pampering, physical challenges, and, at the bottom of everyone's list, solitude and isolation.

²³ For full array, see Table 28.

TABLE 28: BENEFITS SOUGHT FROM PLEASURE TRAVEL (HIGHLY IMPORTANT)

	American Overnight Pleasure Travellers With Destinations in . . .				
		Canada			
	Any Location	Any Province/Territory	Group Tourists	Group Learning Tourists	All Learning Tourists
Unweighted base (45,697)		(6,771)	(1,530)	(742)	(2,454)
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
<i>% Stating "Highly Important"</i>					
See/do something new/different	43%	54%	65%	84%	79%
Solitude and isolation	12%	11%	10%	11%	14%
Knowledge of history, cultures, places	20%	29%	42%	82%	76%
Enrich perspectives	23%	30%	39%	61%	58%
Break from day-to-day environment	72%	67%	60%	61%	68%
Stimulate mind/intellectual challenge	19%	24%	31%	60%	63%
Relax/relieve stress	72%	67%	59%	60%	66%
No fixed schedule	53%	47%	39%	39%	45%
Keep family ties alive	46%	41%	39%	48%	46%
Renew personal connections (non-family)	19%	19%	19%	25%	26%
Stories to share	13%	13%	17%	25%	22%
Enrich relationship with partner/children	55%	53%	52%	59%	59%
Create lasting memories	58%	58%	63%	75%	71%
Physical challenge	12%	13%	15%	23%	22%
To be pampered	15%	14%	20%	22%	18%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 page 23.

C. Incidence of Summer/Winter Trips

Almost all Group Tourists say that they have taken an overnight pleasure trip during the summer months (90%) and about three-quarters make the same claim about winter (78%). These levels of summer and winter travel are essentially the same among Group Learning Tourists, All Learning Tourists and American overnight pleasure travellers to Canada as a whole.

TABLE 29: INCIDENCE OF SUMMER/WINTER PLEASURE TRIPS	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location (45,697)	Province/ Territory (6,771)	Group Tourists (1,530)	Group Learning Tourists (742)	All Learning Tourists (2,454)
Unweighted base Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Took Overnight Pleasure Trip in Past 2 Years In . . .					
Summer	82%	89%	90%	92%	91%
Winter	62%	73%	78%	79%	76%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 page 22.

D. Incidence of Overnight Cruises

Overnight cruises represent a growth market and one that is especially important to tourism businesses in Atlantic and Western Canada. The “organized” nature of cruise travel likely explains why Group Tourists are almost twice as likely to have taken an overnight cruise in the past couple of years (60%) than are typical visitors to Canada (35%).

Ocean cruises are considerably more popular than those on the Great Lakes. About one-quarter of American Group Tourists to destinations in Canada claim to have recent Alaska, Caribbean and/or other ocean cruise experiences.

TABLE 30: INCIDENCE OF OVERNIGHT CRUISE TRIPS – PAST 2 YEARS

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location	Any Province/Territory	Group Tourists	Group Learning Tourists	All Learning Tourists
Unweighted base (45,697)		(6,771)	(1,530)	(742)	(2,454)
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Took any overnight cruise in past 2 years	17%	35%	60%	64%	41%
Type of Cruise/Destination					
Ocean - Alaska	3%	11%	22%	24%	13%
Ocean - Caribbean	9%	16%	25%	26%	17%
Ocean – Other	5%	12%	23%	26%	15%
Great Lakes	*	1%	3%	4%	2%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 page 14.

E. Memberships in Various Organizations

Memberships in auto clubs and frequent flyer programs are characteristic of over half of Group Tourists, Group Learning Tourists and All Learning Tourists. These membership levels are somewhat higher than those found among American overnight pleasure travellers to Canada in total. On par with all U.S. visitors to Canada, about one-third of group and learning tourists are members of a hotel or car rental loyalty program.

At appreciably lower incidence levels than the organizations cited above, group and learning market tourists are over-represented relative to all U.S. tourists to Canada in community service clubs and travel clubs. Group Learning Tourists also seem to have a special interest in book clubs.

TABLE 31: MEMBERSHIPS	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location	Any Province/ Territory	Group Tourists	Group Learning Tourists	All Learning Tourists
Unweighted base	(45,697)	(6,771)	(1,530)	(742)	(2,454)
Weighted, Projected	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Auto club	43%	55%	63%	66%	60%
Sports club	16%	22%	26%	29%	23%
Book/reading club	11%	13%	18%	23%	16%
Community service club	10%	16%	25%	28%	20%
Nature/environmental club	5%	9%	9%	12%	12%
Travel club	4%	8%	15%	18%	10%
Hobby club	6%	7%	10%	12%	9%
Frequent flyer program	31%	47%	53%	59%	54%
Hotel/car rental loyalty program	20%	32%	33%	38%	38%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 33.

VII. Appendices

A. Activity-Based Trip Motivators – Major & Intermediate Categories

TABLE A1: ACTIVITY MOTIVATORS – MAJOR & INTERMEDIATE CATEGORY OVERVIEW

	American Overnight Pleasure Travellers With Destinations in . . .				
	Canada				
	Any Location (45,697)	Any Province/ Territory (6,771)	Group Tourists (1,530)	Group Learning Tourists (742)	All Learning Tourists (2,454)
Unweighted base	166.0 million	20.8 million	5.3 million	2.7 million	7.8 million
Weighted, Projected	45%	57%	60%	61%	59%
Participatory Outdoor Activities					
Outdoor Water Based Activities	30%	39%	42%	42%	37%
Fishing	8%	11%	11%	11%	10%
Diving/Snorkelling	3%	5%	8%	10%	6%
Sunbathing at beach	13%	15%	16%	15%	13%
Swimming in oceans	9%	10%	12%	14%	11%
Outdoor Winter Activities	8%	15%	17%	18%	15%
Alpine skiing	6%	10%	11%	13%	10%
Outdoor Land Based Activities	30%	41%	46%	48%	46%
Flora/Fauna Viewing	5%	11%	16%	19%	14%
Nature park	10%	17%	19%	20%	23%
Camping	10%	12%	14%	15%	13%
Cultural/Learning Activities & Events	23%	36%	49%	58%	49%
Aboriginal Culture/Events	3%	5%	9%	12%	9%
Performing Arts	7%	13%	19%	24%	19%
Classical Concerts, Jazz, Opera	3%	6%	10%	15%	11%
Live theatre	4%	9%	13%	16%	11%
Cultural Festivals/Events	4%	7%	11%	14%	10%
Exhibits, Architecture, Historic Sites/Buildings & Museums	14%	23%	33%	41%	33%
Art galleries	3%	6%	10%	13%	10%
Historic sites, Buildings	11%	17%	25%	33%	27%
Museums	7%	11%	17%	22%	17%
Strolling Around a City to Observe Architecture	7%	12%	18%	23%	18%
Hands on Learning Activities	3%	7%	11%	13%	10%
Theme/Amusement Parks/Other Entertainment/Events	42%	47%	50%	50%	50%
Fairs/Festivals	14%	19%	22%	26%	24%
Casinos	14%	18%	23%	20%	16%
Theme/Amusement Parks/Movies	22%	25%	29%	30%	26%
Gardens/Aquariums/Zoos/Planetariums	10%	13%	18%	22%	16%
Other Entertainment	14%	19%	24%	26%	22%
Food & Wine	13%	20%	27%	31%	25%
Dining	8%	12%	17%	20%	16%
Restaurants with local cuisines	6%	8%	12%	15%	12%
Other Food	4%	7%	12%	16%	11%
Wine/Beer	4%	8%	11%	13%	11%
Day visits to wineries	3%	7%	10%	13%	10%
Lodging	21%	29%	33%	37%	32%
Wilderness/Remote	2%	5%	7%	8%	6%
Resort/Spa	13%	19%	24%	29%	22%
Other Lodging	11%	15%	17%	19%	16%
Shopping	9%	11%	16%	19%	15%
Spectator Sports	14%	20%	23%	24%	22%
Team Sports, Tournaments, Games	6%	9%	11%	12%	8%

Source: TAMS U.S. Special Tabulations, Research Resolutions, Volume 1 pages 7, 8, 9, 10, 11.

B. Trip Activity Groupings

The following major and intermediate categories are used throughout this report and appear in the tabulations. The table identifies the individual activities that contribute to each intermediate group and the intermediate groups that contribute to forming the major category. Note that some activities are included more than once (see “duplication”).

Major Groups	Intermediate Groups	Individual Activities	Duplication	
Any Participatory Outdoor Activities	Any Outdoor Water Based Activities (NET)			
		Fishing (Any)		
		Fishing — fresh water		
			Fishing — salt water	
			Fishing — trophy fishing	
		Kayaking/canoeing (Any)		
			Kayaking or canoeing — freshwater	
			Kayaking or canoeing — ocean	
		Motor/Sail boating (Any)		
			Motor boating	
			Sailing	
		White water rafting		
		Diving/snorkelling (Any)		
			Scuba diving in lakes/rivers	
			Scuba diving in sea/ocean	
			Snorkelling in lakes or rivers	
			Snorkelling in sea/ocean	
		Other Water-Based Activities (NET)		
			Parasailing	
			Kite surfing	
			Sunbathing or sitting on a beach	
			Swimming in lakes	
			Swimming in oceans	
			Water skiing	
			Wind surfing	
		Any Outdoor Winter Activities (NET)		
		Nordic Skiing (Any)		
			Skiing — Cross country	
			Skiing — Cross country or back country as an overnight touring trip	
			Skiing — Ski Jouring	
		Alpine Skiing (Any)		
			Skiing — Downhill	
			Skiing — Heli-skiing	
	Snowboarding			
Snowmobiling (Any)				
	Snowmobiling — Day use on organized trail			
	Snowmobiling — As an overnight touring trip			
Other Outdoor Winter (Any)				
	Dog sledding			
	Fishing — ice fishing			
	Ice-skating			
	Snowshoeing			
Any Outdoor Land Based Activities (NET)				

Major Groups	Intermediate Groups	Individual Activities	Duplication
	ATVs (Any)		
		All terrain vehicle (ATV) — Used one as part of a same day excursion while on a trip of one or more nights	
		All terrain vehicle (ATV) — Used one as part of an overnight touring trip	
	Climbing (Any)		
		Climbing — Ice climbing	
		Climbing — Rock climbing	
		Climbing — Mountain climbing/trekking	
	Cycling (Any)		
		Cycling — Recreational cycling, same day excursion	
		Cycling — Mountain biking	
		Cycling — as an overnight touring trip	
	Golf (Any)		
		Golfing — played an occasional game while on a trip	
		Golfing —played during a stay at a golf resort for one or more nights	
		Golfing — took a package golf tour to play on various courses	
	Hiking (Any)		
		Hiking — same day excursion while on a trip of one or more nights	
		Hiking/Backpacking in wilderness settings with overnight camping or lodging	
	Horseback riding (Any)		
		Horseback riding — same day horseback riding excursion while on a trip of one or more nights	
		Horseback riding — traveled by horse with an overnight stop along the way	
	Hunting (Any)		
		Hunting — Big game	
		Hunting — Small game	
		Hunting — Birds	
	Motorcycling (Any)		
		Motorcycling — day excursion while on a trip of one or more nights	
		Motorcycling — as an overnight touring trip	
	Nature park — visited national, provincial/state park		
	Flora/Fauna Viewing (Any)		
		Wildflowers/flora viewing	
		Wildlife viewing — Bird watching	
		Wildlife viewing — Whale watching and other marine life	
		Wildlife viewing — Land based animals	
	Camping (Any)		
		A public campground in a national, state, provincial or municipal park	Also in lodging
		A private campground	Also in lodging
		A camp site in a wilderness setting (not a campground)	Also in lodging
	Other Outdoor Land/Air Activities (Any)		
		Bungee jumping	
		In-line/roller blading	
		Mini-golf	
		Skateboarding	
		Viewing northern lights	
		Hang gliding	
		Hot air ballooning	
		Parachuting	
		Fitness — Jogging or exercising outdoors	
Cultural/Learning Activities & Events			
	Aboriginal Culture/Events (Any)		

Major Groups	Intermediate Groups	Individual Activities	Duplication
		Aboriginal cultural experiences in a remote or rural setting where you stayed for one or more nights	
		Aboriginal heritage attractions (e.g., museums, interpretive centres)	
		Aboriginal festivals and events (e.g., Pow Wows)	
		Aboriginal cuisine (tasted or sampled)	Also in "food"
		Aboriginal arts and crafts shows	
		Aboriginal outdoor adventure and/or sports	
	Performing Arts (Any)		
	Music Performances (Classical/Jazz/Opera)		
		Classical or symphony concert	
		Jazz concert	
		Opera	
	Live Theatre		
	Ballet or other dance performances		
	Cultural Festivals/Events (Any)		
		International film festivals	
		Literary festivals or events	
		Music festivals	
		Theatre festivals	
	Exhibits, Architecture, Historic Sites/Buildings & Museums		
	Art galleries		
	Historic Sights/Buildings (Any)		
		Historical replicas of cities or towns with historic re-enactments	
		Paleontological/archaeological sites	
		Well known historic sites or buildings	
		Other historic sites, monuments and buildings	
	Museums (Any)		
		Museum — Children's museums	
		Museum — General history or heritage museums	
		Museum — Science or technology museums	
		Museum — Military/war museums	
		Curatorial tours	Also in Hands On
	Other Exhibits, Architecture, Historic Sites/Buildings & Museums (Any)		
		Strolling around a city to observe its buildings and architecture	
	Hands on Learning Activities (Any)		
		Archaeological digs	
		Cooking/wine tasting courses/school NET	
		Cooking/wine tasting courses	Also in food/wine
		Cooking school	Also in food
		Wine tasting school	Also in wine
		Courses to learn another language	
		Curatorial tours	Also in museums
		Harvesting and/or other farm operations	
		Historical re-enactments (as an actor)	
		Interpretive program at a historic site or national/provincial park	
		Wilderness skills courses	
Theme/Amusement Parks/Other Entertainment/Events (Any)			
	Fairs/Festivals (Any)		
		Carnivals	
		Farmers' markets or country fairs	
		Exhibitions or fairs	
		Religious festivals	
		Food/drink festivals	Also in food/wine
		Ethnic festivals	
		Western theme events, such as rodeos	
		Gay Pride parades	

Major Groups	Intermediate Groups	Individual Activities	Duplication
		Firework displays	
		Hot air balloon festivals	
		Comedy festivals	
	Casino		
	Theme/Amusement Parks/Movies (Any)		
		Amusement park	
		Garden theme park	
		Musical attractions	
		Movie theme park	
		Science & technology theme park	
		Water theme park	
		Wax museums	
		Entertainment farms (e.g. corn maze, petting barnyard)	
	Gardens/Aquariums/Zoos/Planetariums (Any)		
		Planetarium	
		Botanical gardens	
		Aquariums	
		Zoos	
	Other Entertainment		
		Country/western music concerts	
		Rock & roll / popular concert	
		Stand-up comedy clubs and other variety shows	
		Circus	
		Free outdoor performances (e.g., theatre, concerts) in a park setting	
		Live theatre with dinner	
		Went to the movies/cinema	
		Went to IMAX movie theatres	
Food & Wine (Any)			
	Dining (Any)		
		Dining — restaurants offering local ingredients and recipes	
		Dining — high-end restaurants of an international reputation	
		Dining – other high-end restaurants	
		Dining at a farm	
		Went to local outdoor cafes	
	Other Food (Any)		
		Shop or browse — gourmet foods in retail stores	
		Went fruit picking at farms or open fields	
		Visited food processing plants such as a cheese factory	
		Cooking school	Also in Lodging
		Country inn or resort because it had a gourmet restaurant on the premises	Also in Lodging
		Aboriginal cuisine (tasted or sampled)	Also in Aboriginal
	Wine/Beer (Any)		
		Went to wineries for day visits and tasting	
		Went to breweries for day visits and tasting	
		Wine tasting school	Also in Lodging
	Other Food/Wine (Any)		
		Food/drink festivals	Also in "Theme Parks/Entertainment"
		Cooking/wine tasting courses	Also in "hands on"
Lodging			
	Wilderness/Remote		
		Remote or fly-in wilderness lodge	
		Remote or fly-in wilderness outpost	
		Wilderness lodge you can drive to by car	
	Resort/Spa (Any)		
		Lakeside/riverside resort	
		Ski resort or mountain resort	
		Seaside resort	

Major Groups	Intermediate Groups	Individual Activities	Duplication
		Health spa	
	Other Lodging (Any)		
		Farm or guest ranch	
		On a houseboat	
		A motor home or RV while traveling or touring (not a camping trip)	
		A public campground in a national, state, provincial or municipal park	Also in "Outdoors"
		A private campground	Also in "Outdoors"
		A camp site in a wilderness setting (not a campground)	Also in "Outdoors"
		Wine tasting school	Also in Food/Wine
		Cooking school	Also in Food/Wine
Shopping (Any)			
		Shop or browse — bookstores or music stores	
		Shop or browse — antiques	
		Shop or browse — gourmet foods in retail stores	Also in "food"
		Shop or browse — local arts & crafts studios or exhibitions	
		Shop or browse — clothing, shoes and jewellery	
		Shop or browse — greenhouse or garden centre	
Spa (Any)			
		Day visit to a health and wellness spa while on a trip of one or more nights	
		Health spa (overnight)	Also in "Lodging"
Spectator Sports (Any)		Individual activities only – no NETS	
Team Sports, Tournaments, Games (Any)		Individual activities only – no NETS	
Other Miscellaneous Activities (Any)			
		Well known natural "wonders"	
		Fitness — Working out in a fitness centre	
		Recreational dancing	
		Photography	
Touring/Cruises			
Any Organized Group Tour			
	Any Organized/Guided Overnight Group Tour		
		Different locations	
		Single location	
	An organized or guided group day tour excursion		
Any Self-Guided Touring			
	A self-guided tour that was not part of an organized or guided group on which you stayed in different places for one or more nights		
	A self-guided same-day tour excursion that was not part of an organized or guided group while on a trip of one or more nights		
Any Overnight Touring (Organized/Self-guided)			
	Any Organized/Guided Overnight Group Tour		
	A self-guided tour that was not part of an organized or guided group on which you stayed in different places for one or more nights		
Day Touring (Organized/Self-guided)			
	An organized or guided group day tour excursion		
	A self-guided same-day tour excursion that was not part of an organized or guided group while on a trip of one or more nights		
Any Cruise			
	Ocean cruise – Alaska		
	Ocean cruise – Caribbean		
	Ocean cruise – Other		

Major Groups	Intermediate Groups	Individual Activities	Duplication
	Great Lakes cruise		
	Cruise on the St. Lawrence River		
	Cruise on another lake or river		
	Submarine cruise		
	Some other type of cruise		
Organized Overnight Tour/Cruise (NET)			
	Any Organized/Guided Overnight Group Tour		
	Any Cruise		

C. TNS Canadian Facts' "Lifestages" Definitions

- 1 - YOUNG SINGLES:
 - 1-Member Household
 - Age of Head Under 35
- 2 - MIDDLE SINGLES:
 - 1-Member Household
 - Age of Head from 35 to 65
- 3 - OLDER SINGLES:
 - 1-Member Household
 - Age of Head Over 65
- 4 - YOUNG COUPLE:
 - Multimember Household
 - Age of Head Under 45
 - Married or Non-related Individual(s) of Opposite Sex 18+ Present
 - No Children Present
- 5 - WORKING OLDER COUPLE:
 - Multimember Household
 - Age of Head 45 and Over
 - Head of Household Employed
 - No Children Present
 - Married or Non-related Individual(s) of Opposite Sex 18+ Present
- 6 - RETIRED OLDER COUPLE
 - Multimember Household
 - Age of Head 45 and Over
 - Head of Household NOT Employed
 - No Children Present
 - Married or Non-related Individual(s) of Opposite Sex 18+ Present
- 7 - YOUNG PARENT
 - Multimember Household
 - Age of Head Under 45
 - Youngest Child Under 6
- 8 - MIDDLE PARENT:
 - Multimember Household
 - Age of Head Under 45
 - Youngest Child 6+
- 9 - OLDER PARENT:
 - Multimember Household
 - Age of Head 45+
 - Child at Home - Any Age
- 0 - ROOMMATES
 - Head of Household Living with a Non-relative 18+ of Same Sex