

U.S. TRAVEL MARKET

U.S. Travellers to Alberta

A Profile Report

January 29, 2008

Prepared by Lang Research Inc. on behalf of:

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



Executive Summary

Over the last two years, 0.9% of adult Americans (2,042,331) took an overnight pleasure trip to Alberta. This represents 1.2% of the U.S. Pleasure Travellers. Alberta was the second most frequently visited western Canadian destination by U.S. Pleasure Travellers (behind British Columbia) in the past two years.

Those who visited Alberta are most likely to live in Alaska or in Montana. There is also an above-average rate of visits among the residents of Washington State, North Dakota, Utah and Wyoming. They are frequent travellers and much more likely than other U.S. Pleasure Travellers to have travelled to all areas of Canada in the last two years.

Those who visited Alberta tend to be older (50.5% are 55 or older) than the average U.S. Pleasure Traveller, and consistent with this fact, they are less likely to have children 18 or younger living at home. They are also more likely to have a university education and report above-average household incomes. As such, travellers to Alberta are over-represented among affluent, mature couples.

Those who visited Alberta were more likely than the average U.S. Traveller to have participated in educational, cultural activities (e.g., historical sites, museums & galleries; aboriginal cultural experiences) and to have attended live art performances (e.g., high art performances) and theatre, film and music festivals while on trips. They were very active in outdoor activities while travelling and especially skiing, golfing, fitness activities (e.g., cycling, exercising and jogging) and nature-oriented activities (e.g., wildlife viewing, horseback riding, hiking, climbing and paddling). They were much more likely than average to take tours and cruises and in particular, freshwater and ocean cruises, organized tours, wilderness tours and tours of wineries, factories or casinos. They tend to stay at resorts (e.g., ski resorts) but were especially likely to have stayed in a wilderness area or to have toured in a motor home.

Alberta Visitors are especially likely to pursue vacations that provide intellectual stimulation, learning opportunities and novelty, at destinations that are culturally distinctive, have lots to see and do, offer both camping and mid-priced accommodation and are conveniently accessible by air, bus or train. This suggests that Alberta should promote its cultural distinctiveness and novelty to the American marketplace.

Those who visited Alberta are above-average users of the Internet to plan (76.7%) and book travel (59.3%). They are also above-average consumers of travel media. They may be most effectively targeted through educational television programming (e.g., history, biographies, science & nature), news media, (e.g., television news, all-news / talk / information radio stations), city lifestyle magazines and classical music radio stations.

Travel Activity and Motivation Survey (TAMS)

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

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

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

TAMS was sponsored by the following organizations:

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

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

The U.S. database is used in this current report. This survey was conducted by mail with an established U.S. mail panel. 60,649 completed questionnaires were returned. The mail panel response rate for this survey was 71.3%. The data have been weighted to project the results to the United States population.

This report profiles those who took a trip to Alberta during the past two years and compares them with other U.S. Pleasure Travellers (i.e., took at least one pleasure trip in the last two years). This report is part of a series of eight reports reviewing U.S. travellers to specific destinations within Canada prepared using the U.S. TAMS

database.

U.S. Travellers to Alberta

Market Incidence

Over the last two years, 0.9% of adult Americans (2,042,331) took an overnight pleasure trip to Alberta. This represents 1.2% of the U.S. Pleasure Travellers. 17.8% of U.S. Pleasure Travellers who visited Alberta reported taking two or more pleasure trips to this province in the last two years. Alberta was the second most frequently visited western Canadian destination by U.S. Pleasure Travellers in the past two years (behind British Columbia).

Fig. 1 Incidence of Trips¹ to Alberta During the Past Two Years

	Alberta
Number of Americans Taking a Trip ²	2,042,331
Percent of U.S. Pleasure Travellers ³	1.2%
Percent of U.S. Population ⁴	0.9%
Percent of Visitors Taking Two or More Pleasure Trips ⁵	17.8%

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

Incidence by Region, State and Population Size

Relative to the average U.S. Pleasure Traveller, those who took a trip to Alberta are over-represented among residents of Alaska, and to lesser extent, the Mountain and Pacific regions of the United States. They are equally likely to live in rural areas, small towns, mid-sized and larger communities.

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

	Total Population	Estimated Number Who Took a Trip to Alberta	Percent of Pleasure Travellers in Region Who Took a Trip to Alberta	Percent of Total Regional Population Who Took a Trip to Alberta
United States	222,846,268	2,042,331	1.2%	0.9%
New England	11,095,629	77,950	0.9%	0.7%
Middle Atlantic	31,005,526	140,113	0.6%	0.5%
East North Central	34,621,254	246,257	0.9%	0.7%
West North Central	15,024,360	182,112	1.5%	1.2%
South Atlantic	42,602,998	249,661	0.8%	0.6%
East South Central	13,597,436	76,413	0.8%	0.6%
West South Central	24,853,901	229,613	1.3%	0.9%
Mountain	15,030,720	249,315	2.1%	1.7%
Pacific	34,529,689	556,279	2.0%	1.6%
Alaska	484,754	34,618	8.2%	7.1%
Not Available	745,757	34,618	5.6%	4.6%
Less than 100,000	29,429,442	283,399	1.4%	1.0%
100,000 to 499,999	36,551,501	328,896	1.2%	0.9%
500,000 to 1,999,999	52,335,815	383,757	1.0%	0.8%
2,000,000 or more	103,783,753	1,011,661	1.2%	1.0%

Those who visited Alberta are most likely to live in Alaska or in Montana. There is also an above-average rate of visits among the residents of Washington State, North Dakota Utah and Wyoming. As would be expected, the likelihood of a visit to Alberta declines as the distance of the state from Alberta increases (see Fig. 3 on next page).

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

Region	State	Population of State	Estimated Number Taking Trip to Alberta	Percent of Pleasure Travellers in State	Percent of State Population
United States	All States	222,846,268	2,042,331	1.2%	0.9%
New England	Connecticut	2,685,692	38,704	1.9%	1.4%
	Maine	1,047,770	15,521	2.1%	1.5%
	Massachusetts	4,423,562	18,561	0.5%	0.4%
	New Hampshire	1,604,344	1,759	0.1%	0.1%
	Rhode Island	837,445	0	0.0%	0.0%
	Vermont	496,816	3,405	0.9%	0.7%
Middle Atlantic	New Jersey	6,708,501	56,022	1.1%	0.8%
	New York	14,727,054	55,318	0.5%	0.4%
	Pennsylvania	9,569,972	28,773	0.4%	0.3%
East North Central	Illinois	9,521,097	77,306	1.0%	0.8%
	Indiana	4,717,624	28,231	0.8%	0.6%
	Michigan	7,709,890	54,346	0.9%	0.7%
	Ohio	8,412,962	47,405	0.8%	0.6%
	Wisconsin	4,259,682	38,970	1.1%	1.0%
West North Central	Iowa	2,262,393	19,864	1.1%	0.9%
	Kansas	2,304,474	30,170	1.7%	1.3%
	Minnesota	3,946,220	56,194	1.7%	1.4%
	Missouri	4,138,758	38,247	1.2%	0.9%
	Nebraska	1,304,361	21,771	2.1%	1.7%
	North Dakota	488,140	12,983	3.2%	2.7%
	South Dakota	580,015	2,884	0.6%	0.5%
South Atlantic	Delaware	646,427	12,480	2.6%	1.9%
	District of Columbia	521,285	0	0.0%	0.0%
	Florida	13,937,467	89,451	0.8%	0.6%
	Georgia	6,668,302	48,328	0.9%	0.7%
	Maryland	3,428,206	32,642	1.2%	1.0%
	North Carolina	6,651,453	20,624	0.4%	0.3%
	South Carolina	3,241,944	0	0.0%	0.0%
	Virginia	5,957,159	46,136	1.0%	0.8%
	West Virginia	1,550,755	0	0.0%	0.0%
East South Central	Alabama	3,431,591	26,256	1.1%	0.8%
	Kentucky	3,447,277	14,460	0.6%	0.4%
	Mississippi	2,156,793	0	0.0%	0.0%
	Tennessee	4,561,775	35,698	1.1%	0.9%
West South Central	Arkansas	2,103,346	0	0.0%	0.0%
	Louisiana	3,367,908	55,362	2.5%	1.6%
	Oklahoma	2,643,565	27,724	1.5%	1.0%
	Texas	16,739,082	146,527	1.2%	0.9%
Mountain	Arizona	4,451,660	31,461	0.9%	0.7%
	Colorado	3,501,822	58,837	2.0%	1.7%
	Idaho	1,044,920	17,762	2.2%	1.7%
	Montana	726,027	44,997	7.5%	6.2%
	Nevada	1,809,582	6,621	0.5%	0.4%
	New Mexico	1,433,596	30,209	2.7%	2.1%
	Utah	1,671,322	48,860	3.5%	2.9%
	Wyoming	391,790	10,567	3.2%	2.7%
Pacific	Alaska	484,754	34,618	8.2%	7.1%
	California	26,965,837	344,565	1.6%	1.3%
	Oregon	2,793,303	50,567	2.3%	1.8%
	Washington	4,770,549	161,147	4.2%	3.4%

Demographic Profile

Those who visited Alberta tend to be older (50.5% are 55 or older) than the average U.S. Pleasure Traveller and, consistent with this fact, are less likely to have children 18 or younger living at home. They are also more likely to have a university education (42.3% university degree, 31.2% post-graduate degree) and report above-average household incomes (\$94,286). As such, travellers to Alberta are over-represented among affluent, mature couples; one of the most sought after travel sectors in the marketplace.

Fig. 4 Demographic Profile of Visitors to Alberta Relative to All U.S. Pleasure Travellers

Attribute	Size of Market	Took a Trip to Alberta	Did Not Take a Trip to Alberta ¹	Pleasure Travellers	Index ²
		2,042,331	168,467,910	170,510,241	100
Gender	Male	50.1%	48.5%	48.5%	103
	Female	49.9%	51.5%	51.5%	97
Age of Respondent	18 to 24	5.1%	10.9%	10.8%	47
	25 to 34	13.8%	21.0%	21.0%	66
	35 to 44	13.0%	17.3%	17.3%	75
	45 to 54	17.6%	21.1%	21.0%	84
	55 to 64	22.8%	15.4%	15.5%	148
	65 Plus	27.7%	14.3%	14.4%	192
Average Age		52.8	45.4	45.4	N/A
Marital Status	Not married	26.8%	30.6%	30.5%	88
	Married	73.2%	69.4%	69.5%	105
Parental Status	No children under 18	82.7%	69.9%	70.0%	118
	Children under 18	17.3%	30.1%	30.0%	58
Education	High school or less	10.2%	20.6%	20.5%	50
	Trade, Technical, Community Col.	16.2%	21.4%	21.4%	76
	University Degree	42.3%	41.0%	41.1%	103
	Post Graduate Degree	31.2%	16.9%	17.1%	183
Household Income	Under \$20,000	2.9%	8.2%	8.1%	36
	\$20,000 to \$39,999	8.9%	16.3%	16.2%	55
	\$40,000 to \$59,999	15.7%	16.7%	16.7%	94
	\$60,000 to \$79,999	13.1%	14.7%	14.7%	89
	\$80,000 to \$99,999	14.3%	11.6%	11.6%	123
	\$100,000 to \$149,999	20.2%	14.3%	14.4%	141
	\$150,000 or more	13.2%	6.6%	6.7%	197
Not stated	11.7%	11.7%	11.7%	100	
Average Household Income		\$94,286	\$74,061	\$74,303	N/A

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

Travel Activity (During Last Two Years)

Those who visited Alberta during the last two years are frequent travellers with 70.1% taking five or more pleasure trips in the last two years. (Note: 42.4% of U.S. Pleasure Travellers took five or more pleasure trips in the last two years). As such, they were more likely than the average U.S. Pleasure Traveller to have taken trips within their home state and much more likely to have travelled to other parts of the United States as well as to Mexico, the Caribbean and overseas destinations.

Americans who visited Alberta also frequently travelled to other parts of Canada with the majority having visited British Columbia (60.4%). Relative to the average U.S. Pleasure Traveller, they were especially likely to have visited Saskatchewan, Manitoba, the Northern Territories and the Atlantic Region during the last two years.

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

	Took a Trip to Alberta	Did Not Take a Trip to Alberta	Pleasure Travellers	Index
Size of Market	2,042,331	168,467,910	170,510,241	100
All destinations	100.0%	85.2%	85.4%	117
Canada	100.0%	13.5%	14.6%	687
Newfoundland and Labrador	7.8%	0.3%	0.4%	1871
Prince Edward Island	8.5%	0.5%	0.6%	1388
New Brunswick	9.2%	0.7%	0.8%	1132
Nova Scotia	11.3%	1.2%	1.3%	845
Quebec	17.2%	2.9%	3.1%	556
Ontario	32.7%	8.0%	8.3%	395
Manitoba	17.7%	0.3%	0.5%	3375
Saskatchewan	24.8%	0.2%	0.5%	5139
Alberta	100.0%	0.0%	1.2%	8334
British Columbia	60.4%	3.4%	4.1%	1462
Yukon	11.9%	0.4%	0.6%	2099
Northwest Territories	7.1%	0.3%	0.4%	1789
Nunavut	1.4%	LT 0.1%	LT 0.1%	3108
Own State	88.6%	79.6%	79.7%	111
Other parts of the U.S.	98.7%	90.5%	90.6%	109
Mexico	28.3%	13.4%	13.6%	208
Caribbean	23.9%	12.6%	12.7%	188
All other destinations	23.7%	9.4%	9.6%	248

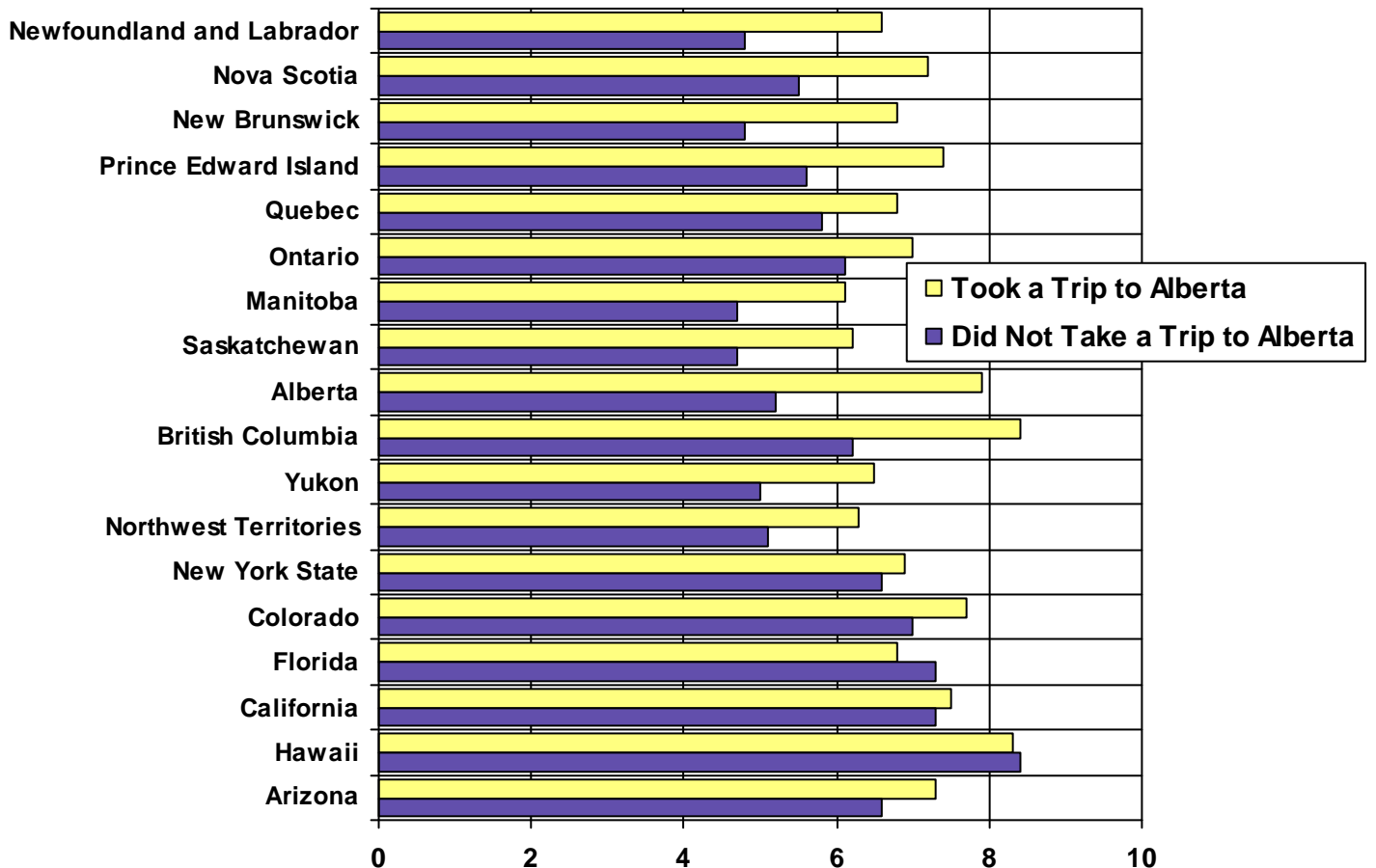
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

The respondents were asked to rate the appeal of each of Canada's provinces and territories on a ten-point appeal scale where "10" is "Very Appealing" and "1" is "Very Unappealing". They were also asked to rate selected U.S. states (New York State, Colorado, Florida, California, Hawaii and Arizona) to provide a frame of reference.

Travellers who visited Alberta have a much more favourable impression of all Canadian destinations than does the average U.S. Pleasure Traveller. British Columbia (8.4) received the highest rating followed by Alberta (7.9), Prince Edward Island (7.4) and Nova Scotia (7.2).

Most of the U.S. reference states were as appealing to Alberta Visitors as to other U.S. Pleasure Travellers. However, those who visited Alberta did perceive Colorado and Arizona to be more appealing destinations, and to a lesser extent, New York State.

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



Culture and Entertainment Activities Pursued While on Trips

U.S. Pleasure Travellers who visited Alberta are much more active than the average U.S. Pleasure Traveller in culture and entertainment pursuits while on trips. They most frequently went shopping and dining, visited historical sites, museums and art galleries and went to casinos, live theatre and comedy clubs while on trips. Relative to the average U.S. Pleasure Traveller, visitors to Alberta were much more likely to have taken part in participatory, educational activities (e.g., aboriginal cultural experiences, participatory historical activities, archaeological digs, agro-tourism) and to have attended live art performances (e.g., high art performances) and theatre, film and music festivals while on trips. They were also more likely to have attended sporting events (e.g., equestrian & western events, professional sporting events, national & international sporting events), to have taken part in a wine, beer or food tasting and to have gone fine dining or visited a spa. Their cultural pursuits reflect the fact that this affluent travel segment that is interested in learning experiences, intellectual stimulation, novelty and live entertainment.

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

	Took a Trip to Alberta	Did Not Take a Trip to Alberta	Pleasure Travellers	Index
Size of Market	2,042,331	168,467,910	170,510,241	100
Shopping and Dining	88.6%	77.6%	77.7%	114
Historical Sites, Museums & Art Galleries	77.6%	53.2%	53.5%	145
Casino, Theatre and Comedy Clubs	63.5%	45.2%	45.4%	140
Fairs and Festivals	57.9%	40.8%	41.0%	141
Theme Parks & Exhibits	53.8%	48.9%	49.0%	110
Fine Dining and Spas	47.9%	32.8%	33.0%	145
Science and Technology Exhibits	42.8%	24.6%	24.8%	173
Wine, Beer and Food Tastings	42.6%	22.7%	22.9%	186
Garden Theme Attractions	31.1%	13.5%	13.7%	228
Equestrian & Western Events	28.6%	15.3%	15.5%	185
Aboriginal Cultural Experiences	27.7%	8.4%	8.6%	322
High Art Performances	26.7%	10.8%	10.9%	244
Professional Sporting Events	26.6%	16.0%	16.1%	165
Agro-Tourism	23.8%	13.4%	13.5%	176
Rock Concerts and Recreational Dancing	21.2%	15.2%	15.3%	139
Theatre, Film & Musical Festivals	17.6%	8.2%	8.3%	211
Archaeological Digs & Sites	17.1%	5.4%	5.5%	309
Participatory Historical Activities	15.0%	3.8%	3.9%	383
Amateur Tournaments	12.1%	7.6%	7.7%	158
National & International Sporting Events	4.3%	1.8%	1.9%	232

Culture and Entertainment Activities Pursued While Not on Trips

U.S. Pleasure Travellers who visited Alberta are also very active in cultural pursuits while NOT travelling. They frequently dine in local restaurants, attend local festivals or fairs, and visit educational attractions (e.g., local historic sites or heritage buildings, museums, zoos or aquariums). Relative to the average U.S. Pleasure Traveller, Alberta Visitors are especially likely to patronize local live art performances (e.g., the opera, ballet, classical music concerts, live theatre) and to visit local art galleries and art shows, botanical gardens and museums. They are also more likely than others to go to local rodeos. On the other hand, reflecting the age of these travellers, they are less likely to go to amusement or theme parks, to bars with rock music or to rock concerts.

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

	Took a Trip to Alberta	Did Not Take a Trip to Alberta	Pleasure Travellers	Index
Size of Market	2,042,331	168,467,910	170,510,241	100
Going out to eat in restaurants	95.4%	92.8%	92.8%	103
Going to festivals or fairs	71.3%	65.4%	65.5%	109
Going to historic sites or heritage buildings	59.3%	39.9%	40.1%	148
Going to museums	57.2%	37.2%	37.5%	153
Going to zoos or aquariums	50.8%	45.6%	45.6%	111
Going to amateur sporting events	47.6%	39.8%	39.9%	119
Going to art galleries or art shows	47.1%	27.5%	27.8%	170
Going to live theatre	47.1%	28.9%	29.2%	162
Going to professional sporting events	36.1%	34.9%	34.9%	104
Going to botanical gardens	33.9%	19.8%	20.0%	170
Going to gamble in casinos	33.5%	27.9%	28.0%	120
Going to pick-your-own farms or farmers' market	33.4%	31.6%	31.6%	106
Going to amusement or theme parks	32.5%	38.2%	38.1%	85
Going to classical music concerts	28.3%	14.7%	14.9%	190
Going to bars with live pop or rock bands	22.0%	23.6%	23.6%	93
Going dancing	20.6%	20.8%	20.8%	99
Going to rock music concerts	18.9%	21.3%	21.3%	89
Going to rodeos	16.6%	8.1%	8.2%	202
Going to day spas	14.1%	10.2%	10.3%	137
Going to the ballet	13.9%	7.0%	7.0%	197
Going to the opera	13.3%	5.7%	5.7%	231
Going to jazz clubs	12.2%	7.9%	7.9%	155
Staying overnight in a hotel or B&B in your own city	12.1%	10.5%	10.6%	115

Outdoor Activities Pursued While on Trips

Despite the maturity of this travel segment, those who visited Alberta were very active in outdoor activities while on trips during the last two years. Relative to the average U.S. Pleasure Traveller, they were especially likely to have gone skiing (e.g., cross-country skiing, downhill skiing) and golfing and to have participated in fitness activities (e.g., cycling, exercising and jogging) while on trips. They were also especially likely to have participated in nature-oriented activities (e.g., wildlife viewing, horseback riding, hiking, climbing and paddling) while on trips during the past two years.

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

	Took a Trip to Alberta	Did Not Take a Trip to Alberta	Pleasure Travellers	Index
Size of Market	2,042,331	168,467,910	170,510,241	100
Wildlife Viewing	68.0%	34.5%	34.9%	195
Hiking, Climbing & Paddling	45.5%	23.2%	23.5%	194
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	42.5%	39.5%	39.6%	107
Boating & Swimming (e.g., motorboating, swimming in lakes)	26.7%	21.0%	21.0%	127
Games & Individual Sports (e.g., tennis, board games)	26.3%	22.2%	22.2%	118
Exercising & Jogging	25.3%	13.9%	14.1%	180
Fishing	23.8%	18.7%	18.8%	127
Golfing	20.5%	10.5%	10.7%	192
Downhill Skiing & Snowboarding	15.7%	7.9%	8.0%	196
Horseback Riding	14.4%	6.1%	6.2%	233
Cycling	13.7%	6.2%	6.3%	216
Snowmobiling & ATVing	12.2%	7.1%	7.1%	171
Team Sports (e.g., football, baseball, basketball)	10.4%	7.9%	7.9%	131
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	9.5%	4.7%	4.8%	199
Board & Blade (e.g., skateboarding, ice-skating)	8.2%	4.0%	4.0%	205
Cross-country Skiing & Snowshoeing	7.8%	1.8%	1.9%	417
Hunting	7.7%	5.4%	5.4%	142
Extreme Air Sports (e.g., parachuting, bungee jumping)	6.6%	1.7%	1.7%	385
Scuba & Snorkeling	6.0%	4.0%	4.1%	148
Motorcycling	5.9%	3.0%	3.1%	193
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	2.7%	0.3%	0.3%	799

Outdoor Activities Pursued While Not on Trips

When NOT travelling, those who visited Alberta continue to be highly active in outdoor activities. The majority go on day outings to local parks and picnic, exercise, garden and swim while not travelling. Relative to the average U.S. Pleasure Traveller, they are especially likely to go skiing (e.g., downhill skiing, cross-country skiing, snowboarding), golfing and participate in nature-oriented activities (e.g., hiking, canoeing or kayaking, horseback riding). However, reflecting the age of these travellers, they are less likely than others to play team sports, rollerblade or skateboard.

Fig. 10 Outdoor Activities Pursued While NOT on Trips

	Took a Trip to Alberta	Did Not Take a Trip to Alberta	Pleasure Travellers	Index
Size of Market	2,042,331	168,467,910	170,510,241	100
Day outing to a park	67.0%	63.1%	63.1%	106
Exercising at home or at a fitness club	65.5%	55.9%	56.0%	117
Gardening	60.3%	53.0%	53.1%	114
Picnicking	55.8%	47.6%	47.7%	117
Swimming	54.8%	56.5%	56.5%	97
Hiking	49.9%	32.3%	32.5%	154
Camping	33.2%	26.6%	26.7%	124
Fishing	31.0%	32.8%	32.8%	95
Cycling	30.3%	22.8%	22.9%	133
Golfing	24.5%	18.2%	18.3%	134
Sailing or other boating	21.8%	19.9%	20.0%	109
Jogging	20.8%	19.5%	19.5%	107
Canoeing or kayaking	15.8%	7.8%	7.8%	201
Horseback riding	14.2%	8.5%	8.6%	166
Playing team sports	14.2%	15.8%	15.8%	90
Playing racquet sports (e.g., tennis or badminton)	13.5%	13.2%	13.2%	102
Hunting	13.4%	11.8%	11.8%	114
Downhill skiing	13.1%	5.6%	5.7%	230
Riding an all-terrain vehicle (ATV)	11.2%	11.5%	11.5%	97
Cross-country skiing	8.2%	2.4%	2.5%	326
Ice-skating	7.3%	5.5%	5.5%	132
Rollerblading	6.8%	7.3%	7.3%	93
Snowmobiling	5.6%	3.3%	3.3%	170
Snowboarding	4.2%	2.7%	2.7%	155
Skateboarding	1.9%	2.2%	2.2%	86

Accommodation Stayed In While on Trips

Those who visited Alberta were most likely to have stayed in resorts (e.g., lakeside resorts, riverside resorts, seaside resorts, ski or mountain resorts) and public campgrounds during the last two years. However, relative to the average U.S. Pleasure Traveller, they were especially likely to have stayed at a ski or mountain resort and a remote lodge or outpost in a wilderness area. They are also more likely to have toured using a motor home and to have stayed at accommodation specializing in fine cuisine (e.g., country inn or resort with gourmet restaurant, cooking school).

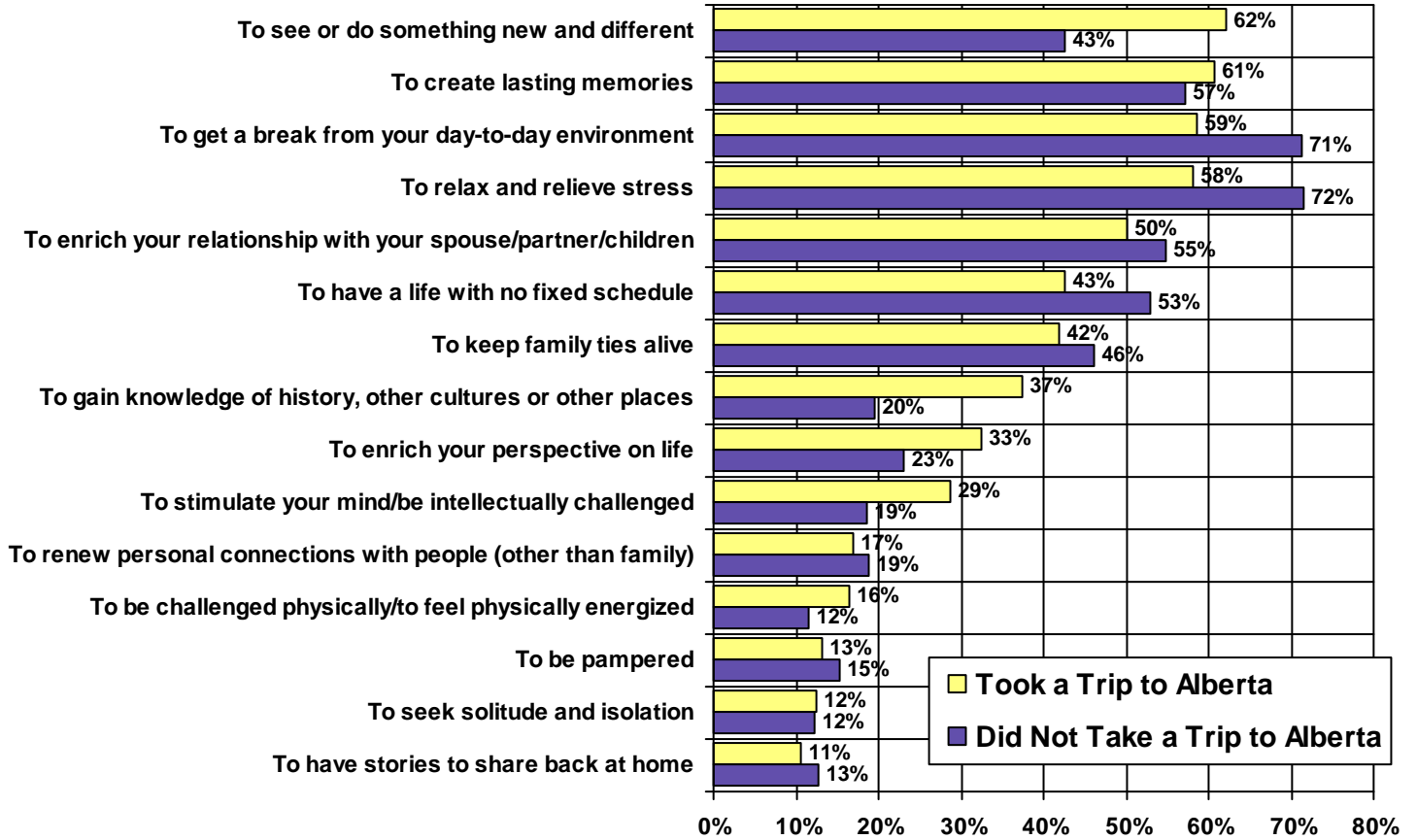
Fig. 11 Accommodation Stayed In While on Trips

	Took a Trip to Alberta	Did Not Take a Trip to Alberta	Pleasure Travellers	Index
Size of Market	2,042,331	168,467,910	170,510,241	100
Lakeside / Riverside Resort	29.4%	12.2%	12.4%	237
A Public Campground in a National, State, Provincial or Municipal Park	28.5%	16.8%	16.9%	168
Seaside Resort	26.1%	18.2%	18.3%	142
Ski Resort or Mountain Resort	24.8%	8.8%	9.0%	276
A Private Campground	19.5%	10.1%	10.2%	192
A Motor Home or RV while Travelling or Touring (Not a Camping Trip)	13.5%	4.1%	4.2%	318
Wilderness Lodge You Can Drive to by Car	11.3%	3.4%	3.5%	323
A Camp Site in a Wilderness Setting (Not a Campground)	9.4%	4.6%	4.7%	200
Country Inn or Resort with Gourmet Restaurant	7.0%	1.9%	2.0%	354
Health Spa	6.2%	3.1%	3.1%	196
Farm or Guest Ranch	5.8%	2.0%	2.0%	293
Remote or Fly-In Wilderness Lodge	3.8%	0.8%	0.8%	462
On a Houseboat	3.6%	1.4%	1.4%	249
Remote or Fly-In Wilderness Outpost	3.4%	0.4%	0.4%	761
Cooking School	3.3%	0.5%	0.6%	578
Wine Tasting School	1.1%	0.4%	0.4%	264

Benefits Sought While on Vacation

As with most U.S. Pleasure Travellers, those who visited Alberta take vacations to see something new and different, create lasting memories, get a break from their day-to-day environment and relax and relieve stress. However, relative to other U.S. Pleasure Travellers, Alberta visitors are especially likely to pursue vacations that provide intellectual stimulation, learning opportunities (e.g., learn about the history and culture of the destination) and novelty (i.e., to see and do something new). This suggests that Alberta should promote its cultural distinctiveness (e.g., aboriginal cultural experiences, arts festivals, natural sites) to the American marketplace.

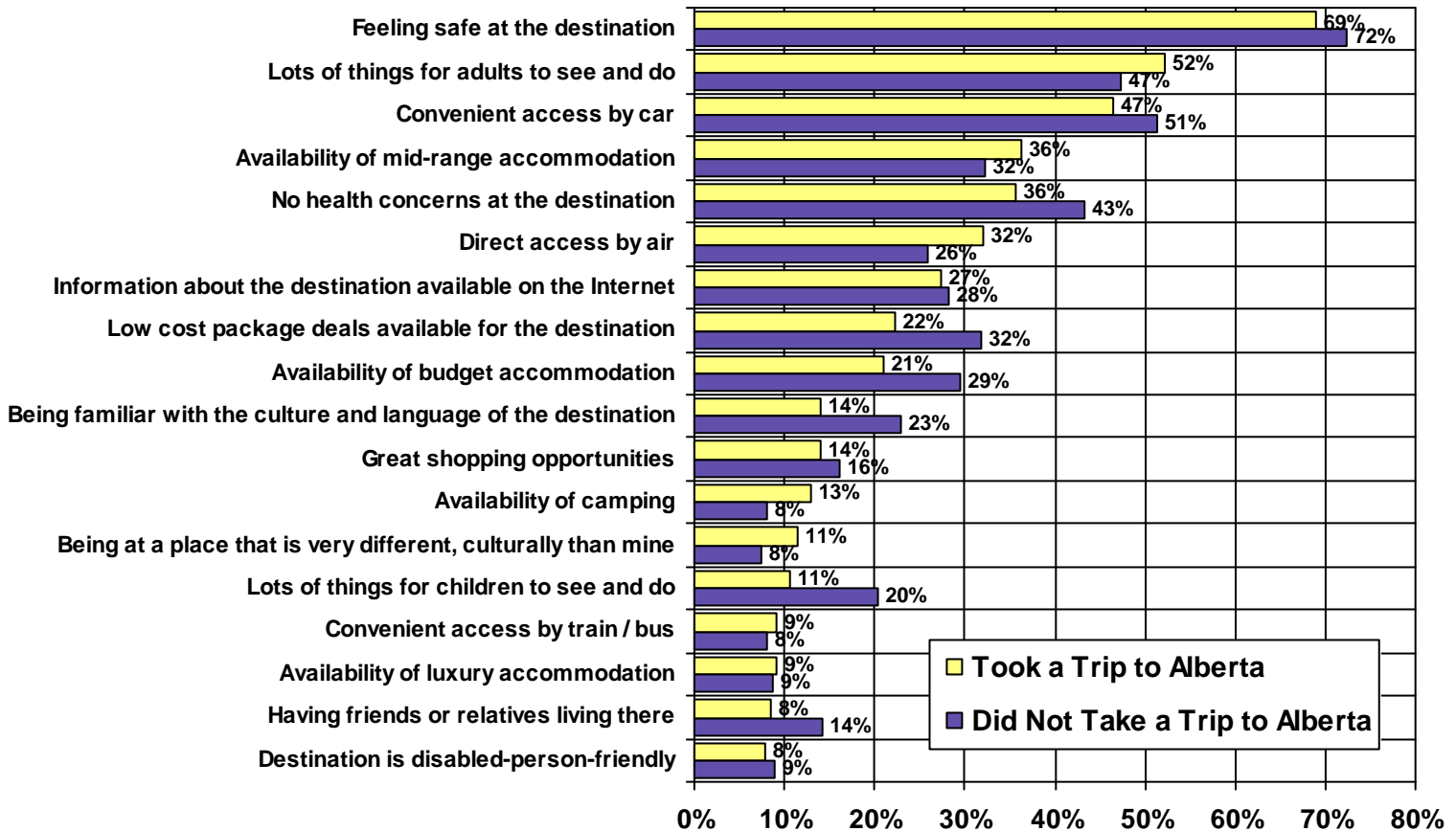
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

As with most U.S. Pleasure Travellers, those who visited Alberta consider it important that they feel safe at a destination. However, relative to other U.S. Pleasure Travellers, Alberta visitors are especially likely to look for destinations that are culturally distinctive, have lots to see and do, offer both camping and mid-range priced accommodation and that are conveniently accessible by air, bus or train. On the other hand, reflecting their age and affluence, they are less concerned whether a destination has lots of activities for children, budget accommodation, discount packages available or family and friends living nearby.

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



How Destinations Are Selected

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

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

	Took a Trip to Alberta	Did Not Take a Trip to Alberta	Pleasure Travellers	Index
Size of Market	2,042,331	168,467,910	170,510,241	100
Summer				
Started with a desired destination in mind	57.2%	58.2%	58.2%	98
Started by considering specific activities wanted to do	14.7%	9.9%	9.9%	148
Started with a certain type of vacation experience in mind	17.2%	17.3%	17.3%	99
Looked for packaged deals - no destination in mind	1.6%	1.1%	1.1%	145
Considered something else first	2.3%	4.6%	4.6%	51
Don't know / Other	7.0%	8.9%	8.9%	79
Winter				
Started with a desired destination in mind	61.1%	58.9%	58.9%	104
Started by considering specific activities wanted to do	14.9%	11.2%	11.3%	133
Started with a certain type of vacation experience in mind	12.8%	14.8%	14.8%	87
Looked for packaged deals - no destination in mind	2.5%	1.4%	1.4%	177
Considered something else first	2.7%	5.4%	5.3%	50
Don't know / Other	5.9%	8.3%	8.3%	72

Trip Planning and Information Sources Consulted

Similar to the average U.S. Pleasure Traveller, most of those who took a trip to Alberta were responsible for planning their trips either on their own (41.4%) or with someone else (19.4%). When making vacation plans, they tend to consult a much wider variety of sources than the average U.S. Pleasure Traveller. The majority use Internet websites, past experience, word-of-mouth and maps to plan their travel. However, visitors to Alberta are much more likely than the average U.S. Pleasure Traveller to obtain travel information from the official travel brochures of specific states or provinces, newspaper or magazine articles, direct mail or email, travel guidebooks such as Fodor's, television programs and trade, travel or sports shows.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Took a Trip to Alberta	Did Not Take a Trip to Alberta	Pleasure Travellers	Index
	Size of Market	2,042,331	168,467,910	170,510,241	100
Who Plans Trips?	Respondent plans trips	41.4%	39.2%	39.2%	106
	Trip planning a shared responsibility	19.4%	17.6%	17.6%	110
	Someone else plans trips	39.2%	43.3%	43.2%	91
Information Sources Consulted	An Internet website	80.9%	75.9%	76.0%	106
	Past experience / Been there before	65.0%	54.4%	54.5%	119
	Advice of others / Word-of-mouth	59.2%	45.2%	45.4%	130
	Maps	56.0%	32.4%	32.7%	171
	Official travel guides or brochures from state / province	46.2%	20.2%	20.6%	225
	Articles in newspapers / magazines	40.3%	17.9%	18.1%	222
	An auto club such as AAA	39.5%	23.8%	24.0%	165
	Visitor information centres	38.1%	20.2%	20.4%	187
	Travel information received in the mail	36.7%	15.5%	15.8%	233
	A travel agent	34.2%	18.4%	18.6%	183
	Travel guide books such as Fodor's	30.5%	11.8%	12.0%	254
	Programs on television	21.1%	6.9%	7.1%	296
	Advertisements in newspapers / magazines	19.2%	10.8%	10.9%	177
	An electronic newsletter or magazine received by e-mail	14.1%	5.9%	6.0%	235
	Visits to trade, travel or sports shows	8.0%	2.4%	2.4%	329
Advertisements on television	4.4%	4.0%	4.0%	110	

Use of the Internet to Plan and Arrange Trips

Those who took a trip to Alberta are above-average users of the Internet to research (76.7%) and book travel (59.3%). They most often consult airline websites, hotel or resort websites, travel planning / booking websites (e.g., Expedia) and the websites of specific countries, regions or cities. In addition, they are much more likely than other U.S. Pleasure Travellers to visit the websites of cruise lines or motorcoach lines. As with most U.S. Pleasure Travellers, Alberta visitors most often use the Internet to purchase airline tickets and accommodation. However, visitors to Alberta are especially likely to use the Internet to book car rentals, purchase travel packages and buy tickets for travel by rail, bus or boat / ship.

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

		Took a Trip to Alberta	Did Not Take a Trip to Alberta	Pleasure Travellers	Index
	Size of Market	2,042,331	168,467,910	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	23.3%	31.1%	31.0%	75
	Uses Internet to plan trips only	17.4%	20.1%	20.1%	87
	Uses Internet to book part of trip	59.3%	48.8%	48.9%	121
Types of Websites Consulted	An airline website	65.5%	45.3%	45.6%	144
	A website of a hotel or resort	64.9%	53.2%	53.3%	122
	A travel planning / booking website	62.9%	55.5%	55.6%	113
	A tourism website of a country / region / city	55.7%	34.8%	35.1%	159
	A website of an attraction	43.7%	33.2%	33.4%	131
	Some other website	36.8%	24.9%	25.1%	147
	A cruise line website	23.9%	12.3%	12.4%	193
	A motorcoach website	3.6%	1.3%	1.3%	272
Parts of Trips Booked Over The Internet	Air tickets	82.2%	70.4%	70.6%	116
	Accommodation	76.5%	71.8%	71.9%	106
	Car rental	56.7%	37.7%	38.0%	149
	Tickets or fees for specific activities or attractions	34.0%	26.2%	26.3%	129
	A package containing two or more items	25.9%	17.7%	17.8%	146
	Tickets for rail, bus or boat / ship fares	19.0%	11.8%	11.9%	160
	Other	2.1%	2.9%	2.9%	72

Media Consumption Habits

U.S. Pleasure Travellers who visited Alberta are above-average consumers of travel media including the travel sections of newspapers, travel magazines, travel programs on television and travel websites. Reflecting this segment's keen interest in educational travel, Alberta visitors may also be effectively reached through educational television programs (e.g., history, science and nature, biography) news and current events programming (e.g., television news, news / talk / information radio stations, magazine websites), city lifestyle magazines and classical music, jazz / big band and multicultural radio stations.

Fig. 18 Media Consumption Habits

		Took a Trip to Alberta	Did Not Take a Trip to Alberta	Pleasure Travellers	Index
Size of Market		2,042,331	168,467,910	170,510,241	100
Newspaper Readership	Reads daily newspaper	73.0%	59.7%	59.9%	122
	Reads weekend edition of newspaper	60.6%	55.5%	55.5%	109
	Reads local neighbourhood or community newspapers	54.5%	49.5%	49.5%	110
	Reads other types of newspapers	19.8%	13.8%	13.9%	143
	Frequently or occasionally reads travel section of daily newspaper	61.8%	42.7%	43.0%	144
	Frequently or occasionally reads travel section of weekend newspaper	68.6%	49.1%	49.3%	139
Types of Magazines Read (Top 5 Indexed)	Travel (e.g., Conde Nast)	24.7%	10.5%	10.6%	232
	Magazines about your city	13.8%	6.8%	6.9%	199
	Science and geography	27.5%	13.9%	14.0%	196
	Regional magazines	13.2%	6.7%	6.8%	194
	Business, finance and investing	24.1%	13.8%	14.0%	173
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	46.0%	28.7%	28.9%	159
	History	52.8%	44.9%	45.0%	117
	Science & nature shows	42.7%	36.7%	36.8%	116
	News / current affairs	67.0%	57.8%	58.0%	116
	Biography	37.4%	32.8%	32.9%	114
Type of Radio Programs Listened To (Top 5 Indexed)	Classical music	24.3%	14.0%	14.1%	172
	Multicultural	7.3%	4.7%	4.7%	153
	News / Talk / Information	48.0%	32.2%	32.4%	148
	Jazz / Big band	14.7%	10.0%	10.0%	147
	All sports	14.8%	11.9%	11.9%	124
Types of Websites Visited (Top 5 Indexed)	Travel	66.9%	47.7%	48.0%	139
	Magazine sites	18.6%	14.8%	14.8%	125
	Health	48.9%	41.7%	41.8%	117
	Sites for specific activities or interests	37.4%	32.5%	32.5%	115
	Network news sites (e.g., CNN)	44.0%	38.6%	38.7%	114

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

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

