

U.S. TRAVEL MARKET

U.S. Travellers to the Atlantic Region

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, 1.4% of adult Americans (3,154,797) took an overnight pleasure trip to the Atlantic Region. This represents 1.9% of U.S. Pleasure Travellers. In the past two years, the Atlantic Region was the fourth most frequently visited Canadian destination by U.S. Pleasure Travellers (behind Ontario, British Columbia and Quebec).

Those who visited the Atlantic Region are most likely to live in Maine and other New England states. They also tend to be over-represented among those living in large cities. They are frequent travellers and much more likely than other U.S. Pleasure Travellers to have travelled to all Canada destinations, and especially Ontario and Quebec.

Those who visited the Atlantic Region are predominantly married (77.9%) and older than the average U.S. Pleasure Traveller. They are also more likely than the average U.S. Pleasure Traveller to have a post-graduate degree and report above-average household incomes. Accordingly, travellers to the Atlantic Region are over-represented among affluent, mature couples: one of the most sought after sectors of the travel market.

Those who visited the Atlantic Region were more likely than the average U.S. Pleasure Traveller to have engaged in educational activities (e.g., historical sites, museums & galleries) and attended cultural events (e.g., high art performances; theatre, film and music festivals) while on trips. They were also very active in outdoor activities and in particular resort-based water activities (e.g., ocean activities, sailing), cross-country skiing and fitness activities. They were much more likely than average to have taken tours and cruises in the last two years and especially ocean and freshwater cruises, multi-location, organized tours and tours of wineries, factories and casinos. They tend to stay at resorts (e.g., seaside and lake / riverside resorts) and were especially attracted to activities and accommodation involving fine cuisine (e.g., wine, beer and food tastings; stays at inns or resorts with gourmet food).

Those who visited the Atlantic Region seek vacations that offer novelty, opportunities to learn and intellectual stimulation. They exhibit a particular interest in learning about the history and culture of different destinations. This suggests that the Atlantic Region should promote its distinctive history and culture to attract the American market.

Those who visited the Atlantic Region are average users of the Internet to plan (76.7%) and book travel (59.3%). However, they are above-average consumers of travel media. They may also be targeted effectively through educational, history programs (e.g., biography, history television), news media (e.g., all-news / talk / information radio, news / current affairs television) 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 the Atlantic Region in 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 the Atlantic Region

Market Incidence

Over the last two years, 1.4% of adult Americans (3,154,797) took an overnight pleasure trip to the Atlantic Region. This represents 1.9% of U.S. Pleasure Travellers. Of those who took a pleasure trip to the Atlantic Region, 13.7% reported taking two or more pleasure trips to this region of Canada during the last two years. In the past two years, the Atlantic Region was the fourth most frequently visited Canadian destination by U.S. Pleasure Travellers (behind Ontario, British Columbia and Quebec).

Within the Atlantic Region, Nova Scotia was visited by the largest number of U.S. Pleasure Travellers (1.0%) followed by New Brunswick (0.6%), Prince Edward Island (0.5%) and Newfoundland and Labrador (0.3%).

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

	Atlantic Region	Newfoundland/ Labrador	Prince Edward Island	New Brunswick	Nova Scotia
Number of Americans Taking a Trip ²	3,154,797	707,710	1,039,711	1,384,344	2,278,830
Percent of U.S. Pleasure Travellers ³	1.9%	0.4%	0.6%	0.8%	1.3%
Percent of U.S. Population ⁴	1.4%	0.3%	0.5%	0.6%	1.0%
Percent of Visitors Taking Two or More Trips ⁵	13.7%	15.1%	13.5%	22.0%	12.3%

- 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 the Atlantic Region 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 the Atlantic Region.
- 4 - This row reports the percent of the Total U.S. Adult Market who took a trip to the Atlantic Region during the past two years.
- 5 - This row reports the percent of U.S. Pleasure Travellers who visited the Atlantic Region who took two or more pleasure trips to the Atlantic Region 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 the Atlantic Region are over-represented among those living in the New England and Middle Atlantic regions of the United States. They are more likely to live in large urban areas (population of 2,000,000 or more) than in mid-sized cities or smaller communities.

Fig. 2 Geographic Distribution & Population Size of Those Who Took a Trip to the Atlantic Region

	Total Population	Estimated Number Who Took a Trip to the Atlantic Region	Percent of Pleasure Travellers in Region Who Took a Trip to the Atlantic Region	Percent of Total Regional Population Who Took a Trip to the Atlantic Region
United States	222,846,268	3,154,797	1.9%	1.4%
New England	11,095,629	565,349	6.6%	5.1%
Middle Atlantic	31,005,526	831,021	3.6%	2.7%
East North Central	34,621,254	288,743	1.1%	0.8%
West North Central	15,024,360	122,325	1.0%	0.8%
South Atlantic	42,602,998	582,300	1.8%	1.4%
East South Central	13,597,436	156,312	1.6%	1.1%
West South Central	24,853,901	142,006	0.8%	0.6%
Mountain	15,030,720	120,017	1.0%	0.8%
Pacific	34,529,689	342,541	1.2%	1.0%
Alaska	484,754	4,183	1.0%	0.9%
Not Available	745,757	4,183	0.7%	0.6%
Less than 100,000	29,429,442	227,180	1.1%	0.8%
100,000 to 499,999	36,551,501	388,865	1.4%	1.1%
500,000 to 1,999,999	52,335,815	706,432	1.8%	1.3%
2,000,000 or more	103,783,753	1,828,136	2.2%	1.8%

Those who visited the Atlantic Region are most likely to live in Maine, and to a lesser extent, other New England states such as New Hampshire, Connecticut, Rhode Island and Massachusetts. There is also an above-average rate of visits among the residents of New York State, New Jersey and Delaware. As would be expected, the likelihood of a visit to the Atlantic Region generally declines as the distance of the state from the region increases (see Fig. 3 on next page).

Fig. 3 Those Who Took a Trip to the Atlantic Region by U.S. State

Region	State	Population of State	Estimated Number Visiting the Atlantic Region	Percent of Pleasure Travellers in State	Percent of State Population
United States	All States	222,846,268	3,154,797	1.9%	1.4%
New England	Connecticut	2,685,692	118,544	5.7%	4.4%
	Maine	1,047,770	130,160	18.0%	12.4%
	Massachusetts	4,423,562	170,781	4.9%	3.9%
	New Hampshire	1,604,344	95,794	8.0%	6.0%
	Rhode Island	837,445	38,678	5.6%	4.6%
	Vermont	496,816	11,392	3.0%	2.3%
Middle Atlantic	New Jersey	6,708,501	219,775	4.2%	3.3%
	New York	14,727,054	418,817	3.8%	2.8%
	Pennsylvania	9,569,972	192,428	2.8%	2.0%
East North Central	Illinois	9,521,097	84,577	1.1%	0.9%
	Indiana	4,717,624	24,324	0.7%	0.5%
	Michigan	7,709,890	73,795	1.2%	1.0%
	Ohio	8,412,962	81,568	1.3%	1.0%
	Wisconsin	4,259,682	24,478	0.7%	0.6%
West North Central	Iowa	2,262,393	19,494	1.1%	0.9%
	Kansas	2,304,474	18,505	1.0%	0.8%
	Minnesota	3,946,220	26,590	0.8%	0.7%
	Missouri	4,138,758	40,943	1.3%	1.0%
	Nebraska	1,304,361	12,036	1.2%	0.9%
	North Dakota	488,140	841	0.2%	0.2%
	South Dakota	580,015	3,917	0.9%	0.7%
South Atlantic	Delaware	646,427	21,547	4.4%	3.3%
	District of Columbia	521,285	2,120	0.6%	0.4%
	Florida	13,937,467	197,843	1.8%	1.4%
	Georgia	6,668,302	84,143	1.7%	1.3%
	Maryland	3,428,206	42,196	1.6%	1.2%
	North Carolina	6,651,453	83,601	1.7%	1.3%
	South Carolina	3,241,944	43,628	1.8%	1.3%
	Virginia	5,957,159	107,221	2.3%	1.8%
	West Virginia	1,550,755	0	0.0%	0.0%
East South Central	Alabama	3,431,591	39,828	1.6%	1.2%
	Kentucky	3,447,277	8,972	0.4%	0.3%
	Mississippi	2,156,793	35,425	2.6%	1.6%
	Tennessee	4,561,775	72,087	2.2%	1.6%
West South Central	Arkansas	2,103,346	7,447	0.5%	0.4%
	Louisiana	3,367,908	18,417	0.8%	0.5%
	Oklahoma	2,643,565	6,127	0.3%	0.2%
	Texas	16,739,082	110,015	0.9%	0.7%
Mountain	Arizona	4,451,660	45,701	1.3%	1.0%
	Colorado	3,501,822	28,117	1.0%	0.8%
	Idaho	1,044,920	0	0.0%	0.0%
	Montana	726,027	3,507	0.6%	0.5%
	Nevada	1,809,582	27,802	1.9%	1.5%
	New Mexico	1,433,596	7,116	0.6%	0.5%
	Utah	1,671,322	7,774	0.6%	0.5%
	Wyoming	391,790	0	0.0%	0.0%
Pacific	Alaska	484,754	4,183	1.0%	0.9%
	California	26,965,837	288,335	1.3%	1.1%
	Oregon	2,793,303	11,509	0.5%	0.4%
	Washington	4,770,549	42,696	1.1%	0.9%

Demographic Profile

U.S. Travellers who visited the Atlantic Region are predominantly married (77.9%) and older than the average U.S. Pleasure Traveller (56.3% are 55 years of age or older). They are also more likely than the average U.S. Pleasure Traveller to have a post-graduate degree (28.5%) and report above-average household incomes (\$91,495). As such, travellers to the Atlantic Region are over-represented among affluent, mature couples: one of the most sought after sectors of the travel market.

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

Attribute		Size of Market	Took a Trip to the Atlantic Region	Did Not Take a Trip to the Atlantic Region ¹	Pleasure Travellers	Index ²
			3,154,797	167,355,444	170,510,241	100
Gender	Male		51.4%	48.5%	48.5%	106
	Female		48.6%	51.5%	51.5%	94
Age of Respondent	18 to 24		4.1%	11.0%	10.8%	38
	25 to 34		10.8%	21.2%	21.0%	51
	35 to 44		11.1%	17.4%	17.3%	64
	45 to 54		17.7%	21.1%	21.0%	84
	55 to 64		21.2%	15.4%	15.5%	137
	65 Plus		35.1%	14.0%	14.4%	244
Average Age			55.6	45.3	45.4	N/A
Marital Status	Not married		24.1%	30.7%	30.5%	79
	Married		75.9%	69.3%	69.5%	109
Parental Status	No children under 18		86.1%	69.7%	70.0%	123
	Children under 18		13.9%	30.3%	30.0%	46
Education	High school or less		15.9%	20.6%	20.5%	78
	Trade, Technical, Community Col.		16.6%	21.5%	21.4%	78
	University Degree		39.0%	41.1%	41.1%	95
	Post Graduate Degree		28.5%	16.9%	17.1%	167
Household Income	Under \$20,000		3.5%	8.2%	8.1%	44
	\$20,000 to \$39,999		11.2%	16.3%	16.2%	69
	\$40,000 to \$59,999		14.2%	16.7%	16.7%	85
	\$60,000 to \$79,999		14.0%	14.7%	14.7%	95
	\$80,000 to \$99,999		11.2%	11.6%	11.6%	96
	\$100,000 to \$149,999		18.1%	14.3%	14.4%	126
	\$150,000 or more		11.4%	6.6%	6.7%	171
	Not stated		16.3%	11.6%	11.7%	140
Average Household Income			\$91,495	\$73,997	\$74,303	N/A

- 1 - "Did Not Take a Trip to the Atlantic Region" 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 the Atlantic Region on any trip.
- 2 - The "Index" is calculated by dividing the percent for those who visited the Atlantic Region 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 the Atlantic Region during the last two years are frequent travellers with 58.6% 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 travelled to other parts of the United States as well as to Mexico, the Caribbean and overseas destinations.

Those who visited the Atlantic Region were also much more likely than the average U.S. Pleasure Traveller to have visited other Canadian destinations in the past two years and especially Ontario and Quebec.

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

	Took a Trip to the Atlantic Region	Did Not Take a Trip to the Atlantic Region	Pleasure Travellers	Index
Size of Market	3,154,797	167,355,444	170,510,241	100
All destinations	100.0%	85.1%	85.3%	117
Canada	100.0%	12.9%	14.6%	687
Newfoundland and Labrador	22.4%	0.0%	0.4%	N/A
Prince Edward Island	33.0%	0.0%	0.6%	N/A
New Brunswick	43.9%	0.0%	0.8%	N/A
Nova Scotia	72.2%	0.0%	1.3%	N/A
Quebec	31.3%	2.6%	3.1%	1010
Ontario	35.8%	7.7%	8.3%	434
Manitoba	5.1%	0.4%	0.5%	964
Saskatchewan	6.6%	0.4%	0.5%	1357
Alberta	9.6%	1.0%	1.2%	800
British Columbia	19.0%	3.8%	4.1%	461
Yukon	5.6%	0.5%	0.6%	989
Northwest Territories	5.2%	0.3%	0.4%	1318
Nunavut	1.2%	LT 0.1%	LT 0.1%	2601
Own State	81.9%	79.6%	79.6%	103
Other parts of the U.S.	97.8%	90.4%	90.5%	108
Mexico	28.2%	13.3%	13.6%	208
Caribbean	33.8%	12.3%	12.7%	265
All other destinations	26.1%	9.2%	9.5%	273

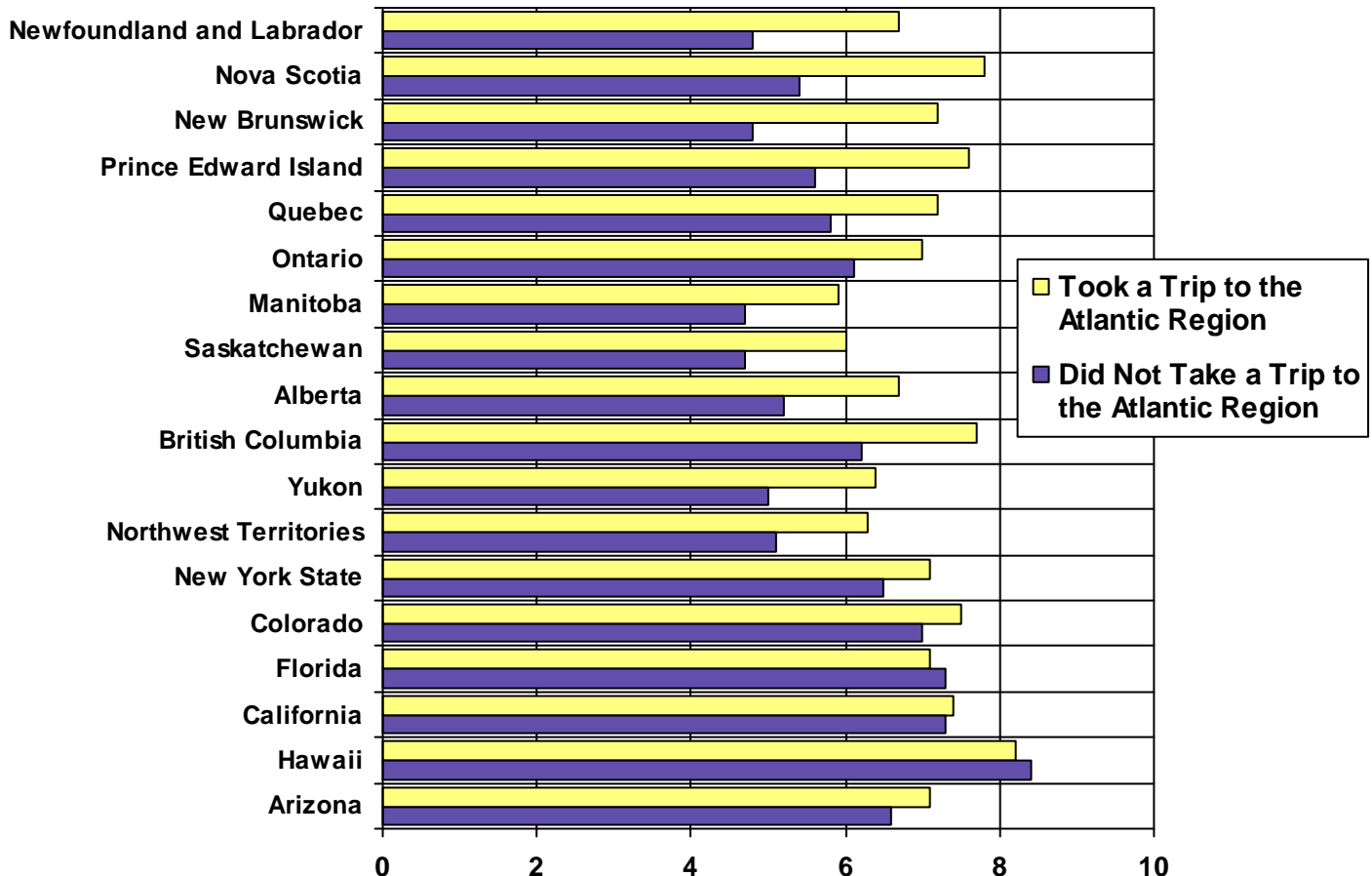
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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

Those who visited the Atlantic Region have a much more favourable impression of all Canadian destinations than does the average U.S. Pleasure Traveller. Nova Scotia (7.8) received the highest rating among Canadian destinations, followed by British Columbia (7.7), Prince Edward Island (7.6), New Brunswick (7.2) and Quebec (7.2).

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

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 the Atlantic Region are more active than the average U.S. Pleasure Traveller in culture and entertainment pursuits while on trips. They most often went shopping and dining, visited historical sites, museums and art galleries and attend casinos, live theatre and comedy clubs while on trips. However, relative to the average U.S. Pleasure Traveller, visitors to the Atlantic Region were much more likely to have taken part in educational activities and attractions (e.g., aboriginal cultural experiences, participatory historical activities, archaeological digs, agro-tourism, science and technology exhibits) 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 taken part in a wine, beer or food tasting and to have visited a festival or fair. Their cultural pursuits reflect the fact that this affluent travel segment 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 the Atlantic Region	Did Not Take a Trip to the Atlantic Region	Pleasure Travellers	Index
Size of Market	3,154,797	167,355,444	170,510,241	100
Shopping and Dining	88.3%	77.5%	77.7%	114
Historical Sites, Museums & Art Galleries (All Activities)	80.4%	53.0%	53.5%	150
Casino, Theatre and Comedy Clubs	69.9%	45.0%	45.4%	154
Fairs and Festivals	61.6%	40.6%	41.0%	150
Theme Parks & Exhibits	54.9%	48.9%	49.0%	112
Wine, Beer and Food Tastings	45.4%	22.5%	22.9%	198
Fine Dining and Spas	45.2%	32.7%	33.0%	137
Science and Technology Exhibits	41.3%	24.5%	24.8%	167
Garden Theme Attractions	32.8%	13.3%	13.7%	240
Equestrian & Western Events	29.9%	15.2%	15.5%	193
High Art Performances	29.7%	10.6%	10.9%	272
Professional Sporting Events	26.3%	15.9%	16.1%	164
Rock Concerts and Recreational Dancing	25.2%	15.1%	15.3%	165
Agro-Tourism	25.0%	13.3%	13.5%	185
Aboriginal Cultural Experiences	19.9%	8.4%	8.6%	232
Theatre, Film & Musical Festivals	18.3%	8.1%	8.3%	220
Participatory Historical Activities	14.0%	3.7%	3.9%	357
Archaeological Digs & Sites	13.1%	5.4%	5.5%	237
Amateur Tournaments	11.1%	7.6%	7.7%	145
National & International Sporting Events	5.4%	1.8%	1.9%	293

Culture and Entertainment Activities Pursued While Not on Trips

U.S. Pleasure Travellers who visited the Atlantic Region are also very active in cultural pursuits while NOT travelling. They frequently dine in local restaurants, attend local festivals or fairs, visits local historic sites or heritage buildings and museums and attend local live theatre. Relative to the average U.S. Pleasure Traveller, they are especially likely to patronize local live art performances (e.g., the opera, ballet, classical music concerts), to visit local art galleries, art shows and museums, to go to local botanical gardens and to gamble in a casino. 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 the Atlantic Region	Did Not Take a Trip to the Atlantic Region	Pleasure Travellers	Index
Size of Market	3,154,797	167,355,444	170,510,241	100
Going out to eat in restaurants	95.8%	92.8%	92.8%	103
Going to festivals or fairs	73.9%	65.3%	65.5%	113
Going to historic sites or heritage buildings	60.2%	39.8%	40.1%	150
Going to museums	57.7%	37.1%	37.5%	154
Going to live theatre	50.9%	28.7%	29.2%	175
Going to art galleries or art shows	45.9%	27.4%	27.8%	165
Going to zoos or aquariums	45.0%	45.7%	45.6%	99
Going to gamble in casinos	41.0%	27.8%	28.0%	146
Going to amateur sporting events	40.6%	39.9%	39.9%	102
Going to professional sporting events	38.5%	34.8%	34.9%	110
Going to pick-your-own farms or farmers' market	36.5%	31.5%	31.6%	115
Going to botanical gardens	34.8%	19.7%	20.0%	174
Going to amusement or theme parks	32.6%	38.2%	38.1%	85
Going to classical music concerts	30.1%	14.6%	14.9%	202
Going dancing	26.2%	20.7%	20.8%	126
Going to rock music concerts	20.6%	21.3%	21.3%	97
Going to bars with live pop or rock bands	18.5%	23.7%	23.6%	79
Going to day spas	14.9%	10.2%	10.3%	145
Staying overnight in a hotel or B&B in your own city	13.3%	10.5%	10.6%	126
Going to the ballet	13.1%	6.9%	7.0%	185
Going to the opera	12.3%	5.6%	5.7%	214
Going to jazz clubs	11.5%	7.8%	7.9%	146
Going to rodeos	9.8%	8.2%	8.2%	119

Outdoor Activities Pursued While on Trips

Despite the maturity of this travel segment, those who visited the Atlantic Region were more active in outdoor activities while on trips than the average U.S. Pleasure Traveller. In relative terms, they were more likely to participate in ocean activities and hiking, climbing and paddling. Other outdoor activities of particular interest to Atlantic Region Visitors include resort-based, water activities (e.g., sailing and surfing, snorkeling), cross-country skiing and fitness activities (e.g., cycling, exercise and jogging).

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

	Took a Trip to the Atlantic Region	Did Not Take a Trip to the Atlantic Region	Pleasure Travellers	Index
Size of Market	3,154,797	167,355,444	170,510,241	100
Wildlife Viewing	54.3%	34.6%	34.9%	155
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	48.1%	39.4%	39.6%	122
Hiking, Climbing & Paddling	38.4%	23.2%	23.5%	164
Games & Individual Sports (e.g., tennis, board games)	28.3%	22.1%	22.2%	127
Boating & Swimming (e.g., motorboating, swimming in lakes)	27.3%	20.9%	21.0%	130
Exercising & Jogging	22.5%	13.9%	14.1%	160
Fishing	21.6%	18.8%	18.8%	115
Golfing	15.2%	10.6%	10.7%	143
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	13.2%	4.6%	4.8%	278
Cycling	11.8%	6.2%	6.3%	187
Downhill Skiing & Snowboarding	11.3%	8.0%	8.0%	141
Team Sports (e.g., football, baseball, basketball)	10.8%	7.8%	7.9%	137
Horseback Riding	10.4%	6.1%	6.2%	169
Snowmobiling & ATVing	9.5%	7.1%	7.1%	133
Board & Blade (e.g., skateboarding, ice-skating)	9.4%	3.9%	4.0%	234
Hunting	7.6%	5.4%	5.4%	141
Extreme Air Sports (e.g., parachuting, bungee jumping)	7.2%	1.6%	1.7%	416
Scuba & Snorkeling	7.2%	4.0%	4.1%	176
Cross-country Skiing & Snowshoeing	6.8%	1.8%	1.9%	362
Motorcycling	5.9%	3.0%	3.1%	194
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	2.3%	0.3%	0.3%	679

Outdoor Activities Pursued While Not on Trips

When NOT travelling, those who visited the Atlantic Region continue to be very active in many outdoor activities. The majority garden at home, go on day outings to local parks and picnic, swim and exercise while not travelling. Relative to the average U.S. Pleasure Traveller, they are more likely to go skiing (e.g., cross-country skiing, downhill skiing), canoeing or kayaking, snowmobiling and golfing. On the other hand, they are less likely than others to play team sports, hunt, go rollerblading or ride an ATV while not travelling.

Fig. 10 Outdoor Activities Pursued While NOT on Trips

	Took a Trip to the Atlantic Region	Did Not Take a Trip to the Atlantic Region	Pleasure Travellers	Index
Size of Market	3,154,797	167,355,444	170,510,241	100
Gardening	62.1%	52.9%	53.1%	117
Day outing to a park	61.8%	63.1%	63.1%	98
Swimming	60.3%	56.5%	56.5%	107
Exercising at home or at a fitness club	59.4%	56.0%	56.0%	106
Picnicking	51.3%	47.7%	47.7%	107
Hiking	39.5%	32.4%	32.5%	122
Fishing	32.1%	32.8%	32.8%	98
Sailing or other boating	26.8%	19.8%	20.0%	134
Cycling	26.5%	22.8%	22.9%	116
Camping	24.7%	26.7%	26.7%	93
Golfing	22.5%	18.2%	18.3%	123
Jogging	19.2%	19.5%	19.5%	98
Playing racquet sports (e.g., tennis or badminton)	14.9%	13.2%	13.2%	113
Playing team sports	13.7%	15.8%	15.8%	87
Canoeing or kayaking	12.7%	7.8%	7.8%	162
Hunting	10.2%	11.8%	11.8%	87
Riding an all-terrain vehicle (ATV)	10.1%	11.5%	11.5%	88
Horseback riding	9.9%	8.6%	8.6%	115
Downhill skiing	7.6%	5.7%	5.7%	133
Ice-skating	6.7%	5.5%	5.5%	122
Cross-country skiing	6.4%	2.4%	2.5%	253
Rollerblading	6.0%	7.3%	7.3%	82
Snowmobiling	5.2%	3.3%	3.3%	156
Snowboarding	3.5%	2.7%	2.7%	129
Skateboarding	2.5%	2.2%	2.2%	116

Accommodation Stayed In While on Trips

Those who visited the Atlantic Region were most likely to have stayed in a resort (e.g., seaside resort, lakeside or riverside resort, ski or mountain resort) in the last two years. They also frequently stayed in public or private campgrounds. Relative to the average U.S. Pleasure Traveller, they were especially likely to have stayed in a wilderness area (e.g., wilderness lodge you can drive to by car, remote wilderness lodges or outposts), to have toured using a motor home or a houseboat and to have stayed at accommodation specializing in fine cuisine (e.g., country inn or resort with gourmet restaurant, cooking school, wine tasting school) during the past two years.

Fig. 11 Accommodation Stayed In While on Trips

	Took a Trip to the Atlantic Region	Did Not Take a Trip to the Atlantic Region	Pleasure Travellers	Index
Size of Market	3,154,797	167,355,444	170,510,241	100
Seaside Resort	31.8%	18.1%	18.3%	173
Lakeside / Riverside Resort	28.2%	12.1%	12.4%	226
A Public Campground in a National, State, Provincial or Municipal Park	20.3%	16.9%	16.9%	120
Ski Resort or Mountain Resort	15.2%	8.9%	9.0%	170
A Private Campground	13.6%	10.1%	10.2%	134
A Motor Home or RV while Travelling or Touring (Not a Camping Trip)	9.6%	4.1%	4.2%	226
Wilderness Lodge You Can Drive to by Car	8.5%	3.4%	3.5%	244
Country Inn or Resort with Gourmet Restaurant	7.4%	1.9%	2.0%	372
Health Spa	5.9%	3.1%	3.1%	188
A Camp Site in a Wilderness Setting (Not a Campground)	5.7%	4.7%	4.7%	122
Farm or Guest Ranch	5.4%	1.9%	2.0%	269
On a Houseboat	5.2%	1.4%	1.4%	367
Remote or Fly-In Wilderness Lodge	4.1%	0.8%	0.8%	500
Cooking School	3.5%	0.5%	0.6%	603
Remote or Fly-In Wilderness Outpost	2.9%	0.4%	0.4%	666
Wine Tasting School	2.5%	0.4%	0.4%	594

Tours and Cruises Taken During Past Two Years

Those who visited the Atlantic Region were much more likely than the average U.S. Pleasure Traveller to have taken tours and cruises during the last two years. Sameday tours (both organized and self-guided), city tours and scenic countryside drives were the most popular tours for this segment. However, relative to the average U.S. Pleasure Traveller, those who visited the Atlantic Region were especially likely to have taken cruises in the past two years, including ocean cruises, sightseeing cruises and specialized cruises (e.g., St. Lawrence River cruise). They were also more likely to have taken multi-location, organized tours and tours of wineries, factories and casinos. This pattern suggests that tours and ocean cruises in the Atlantic Region may be especially appealing to U.S. Pleasure Travellers.

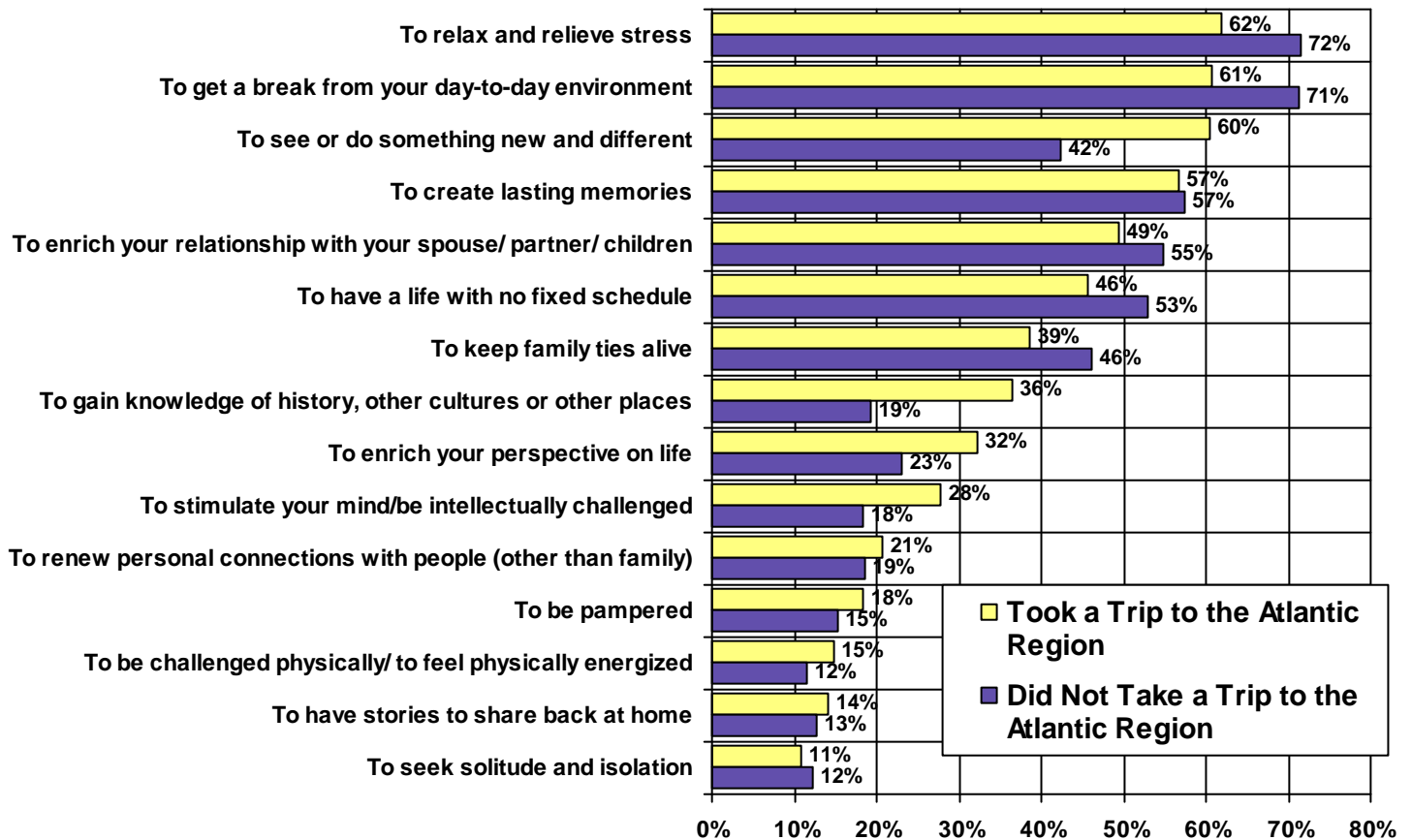
Fig. 12 Tours and Cruises Taken During Past Two Years

	Took a Trip to the Atlantic Region	Did Not Take a Trip to the Atlantic Region	Pleasure Travellers	Index
Size of Market	3,154,797	167,355,444	170,510,241	100
An organized, sameday, guided tour while on an overnight trip	40.9%	18.1%	18.5%	221
Around the city	39.7%	15.3%	15.8%	252
A self-guided, sameday tour while on an overnight trip	36.5%	18.9%	19.2%	190
Around the country side – scenic drives	35.2%	12.7%	13.1%	269
Ocean cruise – Other	32.7%	4.3%	4.8%	682
An organized, overnight, guided tour where you stayed in different locations	32.0%	7.4%	7.9%	406
A self-guided, overnight tour where you stayed in different locations	27.1%	10.1%	10.4%	261
Caribbean ocean cruise	26.9%	8.7%	9.0%	299
On the water (sightseeing cruise)	24.4%	7.5%	7.8%	314
An organized, overnight, guided tour where you stayed in a single location	20.3%	6.5%	6.7%	302
Some other type of tour	15.8%	8.7%	8.8%	179
Wilderness tour	13.9%	7.3%	7.4%	187
Alaskan ocean cruise	13.3%	2.3%	2.5%	535
To a casino	13.3%	4.7%	4.9%	271
To a winery	12.5%	3.4%	3.6%	351
Some other type of cruise	11.3%	1.5%	1.7%	658
Cruise on another lake or river	8.1%	1.9%	2.0%	412
To a factory	7.8%	1.7%	1.8%	429
Cruise on the St. Lawrence River	7.6%	0.1%	0.3%	2667
In the air as a pilot or passenger of an airplane or helicopter	6.9%	1.3%	1.4%	489
Great Lakes cruise	3.2%	0.3%	0.4%	832
Submarine cruise	1.2%	0.2%	0.2%	495

Benefits Sought While on Vacation

As with most U.S. Pleasure Travellers, those who visited the Atlantic Region take vacations to relax and relieve stress, get a break from their day-to-day environment, see something new and different and create lasting memories. However, relative to other U.S. Pleasure Travellers, those who visited the Atlantic Region are especially likely to seek out vacation destinations that offer novelty (e.g., to see and do something new), opportunities to learn (e.g., gain knowledge of history and other cultures or places) and intellectual stimulation (e.g., enrich your perspective on life). This suggests that the Atlantic Region should promote its unique culture and history to U.S. Pleasure Travellers.

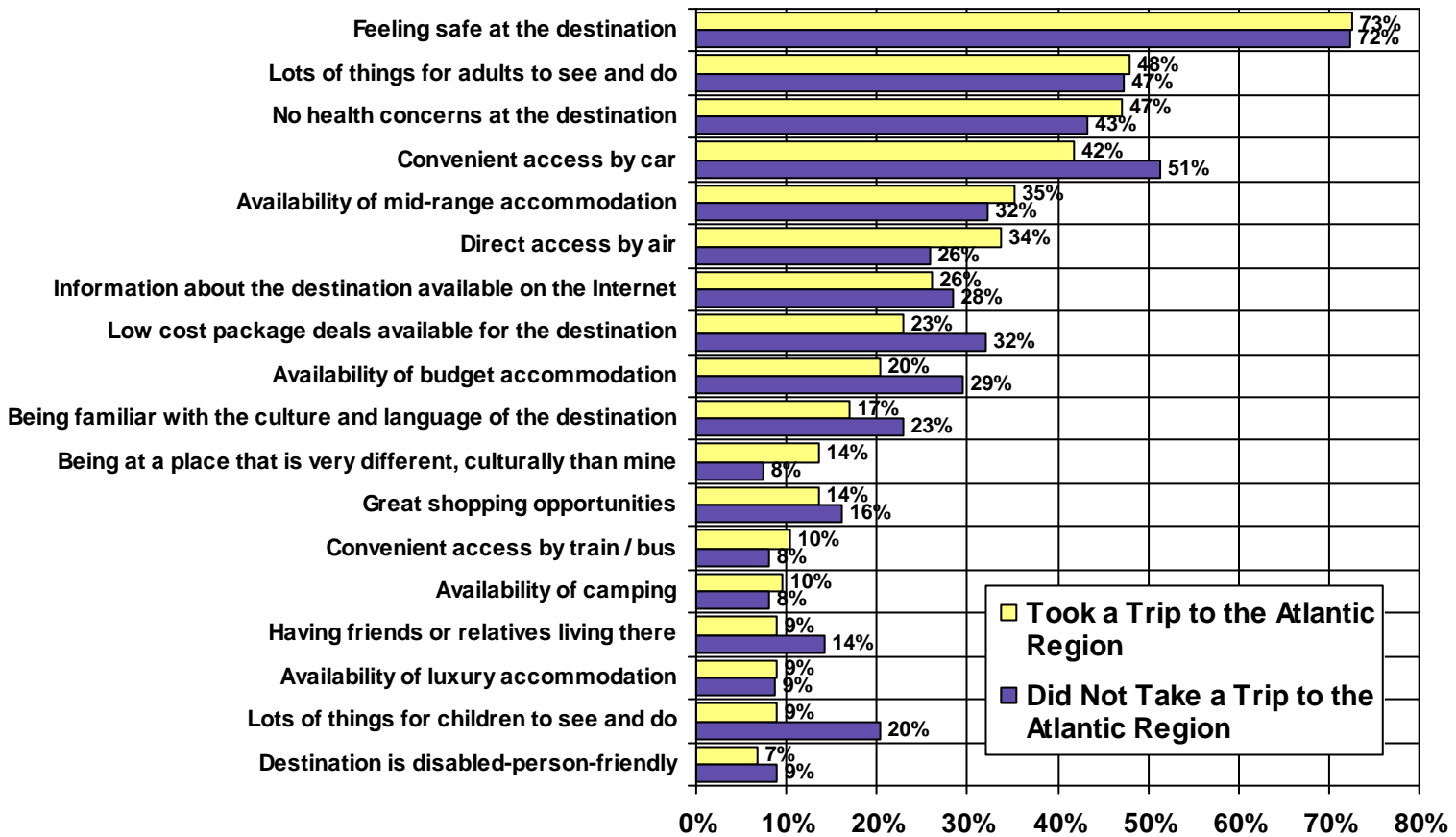
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

Similar to other U.S. Pleasure Travellers, most of those who visited the Atlantic Region consider it important that they feel safe at a destination. However, relative to the average U.S. Pleasure Traveller, Atlantic Region visitors are especially attracted to destinations that are culturally distinct, offer both camping and mid-range priced accommodation and are conveniently accessible by air, bus or train. On the other hand, given their affluence and maturity, those who visited the Atlantic Region are less concerned whether a destination has lot of activities for children to see and do, budget accommodation, convenient access by car or family or 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 Atlantic Region visitors start planning vacations with a particular destination in mind. This travel segment may also be especially responsive to discount vacation packages.

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

	Took a Trip to the Atlantic Region	Did Not Take a Trip to the Atlantic Region	Pleasure Travellers	Index
Size of Market	3,154,797	167,355,444	170,510,241	100
Summer				
Started with a desired destination in mind	60.2%	58.2%	58.2%	103
Started by considering specific activities wanted to do	10.6%	9.9%	9.9%	106
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	2.9%	1.1%	1.1%	265
Considered something else first	3.6%	4.6%	4.6%	79
Don't know / Other	5.5%	8.9%	8.9%	62
Winter				
Started with a desired destination in mind	62.6%	58.9%	58.9%	106
Started by considering specific activities wanted to do	12.3%	11.2%	11.3%	110
Started with a certain type of vacation experience in mind	13.7%	14.8%	14.8%	93
Looked for packaged deals - no destination in mind	2.3%	1.4%	1.4%	158
Considered something else first	2.8%	5.4%	5.3%	52
Don't know / Other	6.3%	8.3%	8.3%	76

Trip Planning and Information Sources Consulted

Similar to the average U.S. Pleasure Traveller, most of those who took a trip to the Atlantic Region were responsible for planning their trips either on their own (36.4%) or with someone else (23.9%). However, Atlantic Region visitors were slightly more likely to plan their trips with someone else (most likely their spouse). When making vacation plans, they tend to consult a wider variety of sources than the average U.S. Pleasure Traveller. The majority use Internet websites and past experience when planning a trip. However, visitors to the Atlantic Region are especially more likely to obtain travel information from travel agents, official government guides or brochures, direct mail travel information and travel guidebooks such as Fodor's.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Took a Trip to the Atlantic Region	Did Not Take a Trip to the Atlantic Region	Pleasure Travellers	Index
Size of Market		3,154,797	167,355,444	170,510,241	100
Who Plans Trips?	Respondent plans trips	36.4%	39.2%	39.2%	93
	Trip planning a shared responsibility	23.9%	17.5%	17.6%	136
	Someone else plans trips	39.8%	43.3%	43.2%	92
Information Sources Consulted	An Internet website	73.2%	76.0%	76.0%	96
	Past experience / Been there before	57.1%	54.4%	54.5%	105
	Advice of others / Word-of-mouth	47.4%	45.3%	45.4%	105
	Maps	44.5%	32.4%	32.7%	136
	An auto club such as AAA	42.7%	23.6%	24.0%	178
	A travel agent	42.6%	18.2%	18.6%	229
	Official travel guides or brochures from state / province	41.0%	20.2%	20.6%	199
	Travel information received in the mail	36.2%	15.3%	15.8%	230
	Visitor information centres	35.7%	20.1%	20.4%	175
	Articles in newspapers / magazines	32.0%	17.9%	18.1%	176
	Travel guide books such as Fodor's	25.4%	11.7%	12.0%	212
	Advertisements in newspapers / magazines	18.8%	10.7%	10.9%	173
	Programs on television	14.2%	7.0%	7.1%	199
	An electronic newsletter or magazine received by e-mail	12.0%	5.9%	6.0%	200
	Visits to trade, travel or sports shows	7.5%	2.3%	2.4%	306
Advertisements on television	5.9%	3.9%	4.0%	148	

Use of the Internet to Plan and Arrange Trips

Those who took a trip to the Atlantic Region are average users of the Internet to research (69.6%) and book travel (48.7%). The majority use travel planning / booking websites (e.g., Expedia), airline websites, hotel or resort websites and the websites of specific countries, regions or cities. However, they are much more likely than other U.S. Pleasure Travellers to visit the websites of cruise lines or motorcoach lines. Similar to other U.S. Pleasure Travellers, Atlantic Region visitors most often use the Internet to book accommodation and buy airline tickets. However, visitors to the Atlantic Region also more likely to use the Internet to arrange car rentals and purchase tickets for travel by rail, bus or boat / ship.

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

		Took a Trip to the Atlantic Region	Did Not Take a Trip to the Atlantic Region	Pleasure Travellers	Index
	Size of Market	3,154,797	167,355,444	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	30.5%	31.0%	31.0%	98
	Uses Internet to plan trips only	20.9%	20.1%	20.1%	104
	Uses Internet to book part of trip	48.7%	48.9%	48.9%	99
Types of Websites Consulted	A travel planning / booking website	62.2%	55.5%	55.6%	112
	A website of a hotel or resort	57.6%	53.2%	53.3%	108
	An airline website	57.4%	45.3%	45.6%	126
	A tourism website of a country / region / city	53.0%	34.8%	35.1%	151
	A cruise line website	40.9%	11.9%	12.4%	329
	A website of an attraction	34.3%	33.4%	33.4%	103
	Some other website	28.8%	25.0%	25.1%	115
	A motorcoach website	3.3%	1.3%	1.3%	247
Parts of Trips Booked Over The Internet	Accommodation	77.0%	71.8%	71.9%	107
	Air tickets	75.7%	70.5%	70.6%	107
	Car rental	53.7%	37.7%	38.0%	142
	Tickets or fees for specific activities or attractions	30.0%	26.3%	26.3%	114
	Tickets for rail, bus or boat / ship fares	27.4%	11.6%	11.9%	230
	A package containing two or more items	23.4%	17.7%	17.8%	132
	Other	4.5%	2.9%	2.9%	154

Media Consumption Habits

U.S. Pleasure Travellers who visited the Atlantic Region are above-average consumers of travel media including travel sections of the newspapers, travel magazines, travel programs on television and travel websites. They may also be effectively reached through news and current event programming (e.g., television news, news / talk / information radio, newspaper websites, network news websites), history-related television programs (e.g., biography, history programming) and classical music radio stations.

Fig. 18 Media Consumption Habits

		Took a Trip to the Atlantic Region	Did Not Take a Trip to the Atlantic Reg.	Pleasure Travellers	Index
Size of Market		3,154,797	167,355,444	170,510,241	100
Newspaper Readership	Reads daily newspaper	76.4%	59.6%	59.9%	128
	Reads weekend edition of newspaper	66.9%	55.3%	55.5%	121
	Reads local neighbourhood or community newspapers	65.2%	49.3%	49.5%	132
	Reads other types of newspapers	22.4%	13.7%	13.9%	162
	Frequently or occasionally reads travel section of daily newspaper	69.9%	42.5%	43.0%	163
	Frequently or occasionally reads travel section of weekend newspaper	75.3%	48.8%	49.3%	153
Types of Magazines Read (Top 5 Indexed)	Travel (e.g., Conde Nast)	28.0%	10.3%	10.6%	264
	Photography and video	7.7%	3.8%	3.9%	199
	Regional magazines	13.0%	6.7%	6.8%	190
	Science and geography	24.1%	13.9%	14.0%	172
	Business, finance and investing	23.2%	13.8%	14.0%	166
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	49.0%	28.6%	28.9%	169
	Shopping channels	10.7%	7.7%	7.7%	139
	Biography	44.9%	32.6%	32.9%	136
	History	59.7%	44.7%	45.0%	133
	News / current affairs	72.7%	57.7%	58.0%	125
Type of Radio Programs Listened To (Top 5 Indexed)	Classical music	25.3%	13.9%	14.1%	179
	News / Talk / Information	52.5%	32.0%	32.4%	162
	Jazz / Big band	16.1%	9.9%	10.0%	161
	Multicultural	6.1%	4.7%	4.7%	129
	Oldies (50s, 60s, 70s, 80s)	52.4%	43.7%	43.8%	120
Types of Websites Visited (Top 5 Indexed)	Travel	62.3%	47.7%	48.0%	130
	Newspaper sites	35.3%	29.5%	29.6%	119
	House and home	33.1%	28.7%	28.7%	115
	Network news sites (e.g., CNN)	43.9%	38.6%	38.7%	113
	Health	45.7%	41.7%	41.8%	109

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

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

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