

# U.S. TRAVEL MARKET

## U.S. Travellers to Quebec

### *A Profile Report*

January 24, 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, 2.4% of adult Americans (5,276,757) took an overnight pleasure trip to Quebec. This represents 3.1% of U.S. Pleasure Travellers. 22.9% of the U.S. Pleasure Travellers took two or more pleasure trips to Quebec in the last two years.

Those who visited Quebec are most likely to live in a border state such as Maine, Vermont and New Hampshire. However, there is also an above-average rate of visits among the residents of Massachusetts, the District of Columbia and Connecticut. They are also over-represented among those from larger urban centers.

Those who visited Quebec tend to be older and more affluent than the average U.S. Pleasure Traveller. 31.2% have a post-graduate degree (as opposed to 16.6% for the average U.S. Pleasure Traveller), and 35.1% report a household of \$100,000 or more (as opposed to 21.1% for the average U.S. Pleasure Traveller). Their age, level of education and household incomes are reflected in the types of activities they pursue while on trips.

Those who visited Quebec are much more likely than other U.S. Pleasure Travellers to have participated in education-related activities (e.g., participatory historical activities, aboriginal cultural experiences, archaeological digs and sites) and to have attended high art performances, theatre, film and music festivals and garden-themed attractions. They are very active in outdoor activities including downhill skiing, cross-country skiing, sailing and other boating activities. They frequently take guided tours (and especially city tours) and cruises. They prefer luxury accommodation (e.g., resorts) and especially those that specialize in fine cuisine.

They seek vacations that offer opportunities to be intellectually stimulated, offer novelty and allow them to experience a different culture. This suggests that Quebec should emphasize its cultural distinctiveness in promotions to the U.S. travel market.

Those who visited Quebec are above-average users of the Internet to plan (77.4%) and book travel (58.3%). They are also above-average consumers of travel media. They may be most effectively targeted through intellectual television programming (e.g., programs about history, biographies, science and nature), news programming (e.g., television news, news / talk / information radio stations, Internet news sites), city lifestyle magazines and classical music and multicultural 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 Quebec 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



## U.S. Travellers to Quebec

### Market Incidence

Over the last two years, 2.4% of adult Americans (5,276,757) took an overnight pleasure trip to Quebec. This represents 3.1% of U.S. Pleasure Travellers. 22.9% of the U.S. Pleasure Travellers reported taking two or more pleasure trips to Quebec in the last two years. Quebec was the third most frequently visited Canadian destination by U.S. Pleasure Travellers (behind Ontario and British Columbia) in the past two years.

Fig. 1 Incidence of Trips<sup>1</sup> to Quebec During the Past Two Years

	Travel to Quebec
Number of Americans Taking a Trip to Quebec <sup>2</sup>	5,276,757
Percent of U.S. Pleasure Travellers <sup>3</sup>	3.1%
Percent of U.S. Population <sup>4</sup>	2.4%
Percent of Pleasure Travellers Taking Two or More Pleasure Trips to Quebec <sup>5</sup>	22.9%

- 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 Quebec 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 Pleasure Travellers who took a trip to Quebec.
- 4 - This row reports the percent of the Total U.S. Adult Market who took a trip to Quebec during the past two years.
- 5 - This row reports the percent of U.S. Pleasure Travellers who visited Quebec who took two or more pleasure trips to Quebec 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 Quebec are over-represented among those living in New England and, to a much lesser extent, the Middle Atlantic Region of the United States. They are slightly more likely to live in large cities (population 500,000 or more) than in mid-sized and smaller communities.

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

	Total Population	Estimated Number Who Took a Trip to Quebec	Percent of Pleasure Travellers in Region Who Took a Trip to Quebec	Percent of Total Regional Population Who Took a Trip to Quebec
United States	222,846,268	5,276,757	3.1%	2.4%
New England	11,095,629	1,065,964	12.4%	9.7%
Middle Atlantic	31,005,526	1,267,849	5.5%	4.1%
East North Central	34,621,254	758,621	2.8%	2.2%
West North Central	15,024,360	167,124	1.4%	1.1%
South Atlantic	42,602,998	845,058	2.6%	2.0%
East South Central	13,597,436	173,552	1.8%	1.3%
West South Central	24,853,901	235,839	1.3%	1.0%
Mountain	15,030,720	197,209	1.6%	1.3%
Pacific	34,529,689	556,857	2.0%	1.6%
Alaska	484,754	8,683	2.1%	1.8%
Not Available	745,757	13,948	2.2%	1.9%
Less than 100,000	29,429,442	390,645	1.9%	1.3%
100,000 to 499,999	36,551,501	674,472	2.5%	1.8%
500,000 to 1,999,999	52,335,815	1,251,424	3.1%	2.4%
2,000,000 or more	103,783,753	2,946,267	3.6%	2.9%

Those who visited Quebec are most likely to live in a border state such as Maine, Vermont and New Hampshire. However, there is also an above-average rate of visits among residents of Massachusetts, the District of Columbia and Connecticut. As would be expected, the likelihood of a visit to Quebec declines as the distance of the state from Quebec increases (see Fig. 3 on next page).



## Demographic Profile

Travellers who visited Quebec are somewhat more likely to be male than female. They are predominantly married (68.6%) and tend to be older than the average U.S. Pleasure Traveller. They are also more likely to report having a post-secondary education (71.2%) and a household income above \$100,000 a year. As such, travellers to Quebec are over-represented among affluent, mature couples.

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

Attribute	Size of Market	Took a Trip to Quebec	Did Not Take a Trip to Quebec <sup>1</sup>	Pleasure Travellers	Index <sup>2</sup>
		5,276,757	165,233,484	170,510,241	100
Gender	Male	54.9%	48.3%	48.5%	113
	Female	45.1%	51.7%	51.5%	88
Age of Respondent	18 to 24	9.5%	10.9%	10.8%	88
	25 to 34	17.2%	21.1%	21.0%	82
	35 to 44	13.0%	17.4%	17.3%	75
	45 to 54	21.7%	21.0%	21.0%	103
	55 to 64	18.6%	15.4%	15.5%	120
	65 Plus	20.0%	14.2%	14.4%	139
Average Age		48.5	45.3	45.4	N/A
Marital Status	Not married	31.4%	30.5%	30.5%	103
	Married	68.6%	69.5%	69.5%	99
Parental Status	No children under 18	81.0%	69.7%	70.0%	116
	Children under 18	19.0%	30.3%	30.0%	63
Education	High school or less	14.2%	20.7%	20.5%	69
	Trade, Technical, Community Col.	14.6%	21.6%	21.4%	68
	University Degree	40.0%	41.1%	41.1%	97
	Post Graduate Degree	31.2%	16.6%	17.1%	183
Household Income	Under \$20,000	6.0%	8.2%	8.1%	75
	\$20,000 to \$39,999	10.3%	16.4%	16.2%	64
	\$40,000 to \$59,999	14.4%	16.8%	16.7%	87
	\$60,000 to \$79,999	11.9%	14.8%	14.7%	81
	\$80,000 to \$99,999	10.6%	11.6%	11.6%	91
	\$100,000 to \$149,999	20.3%	14.2%	14.4%	141
	\$150,000 or more	14.8%	6.4%	6.7%	221
Not stated	11.7%	11.7%	11.7%	100	
Average Household Income		\$95,787	\$73,617	\$74,303	N/A

1 - "Did Not Take a Trip to Quebec" 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 Quebec on any trip.

2 - The "Index" is calculated by dividing the percent for those who visited Quebec in each group by the percent of 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 Quebec during the last two years are frequent travellers with 64.5% 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 much more likely than the average U.S. Pleasure Traveller to have taken trips to other parts of the United States as well as Mexico, the Caribbean and overseas destinations. On the other hand, their travel within their own state is only average.

Americans who visited Quebec also frequently travelled to other parts of Canada and especially Ontario (51.2%). Relative to the average U.S. Pleasure Traveller, they were especially likely to have also visited 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 Quebec	Did Not Take a Trip to Quebec	Pleasure Travellers	Index
Size of Market	5,276,757	165,233,484	170,510,241	100
All destinations	100.0%	84.9%	85.3%	117
Canada	100.0%	11.8%	14.6%	687
Newfoundland and Labrador	5.2%	0.3%	0.4%	1260
Prince Edward Island	8.0%	0.4%	0.6%	1316
New Brunswick	9.9%	0.5%	0.8%	1221
Nova Scotia	15.3%	0.9%	1.3%	1147
Quebec	100.0%	9.0%	3.1%	3228
Ontario	51.2%	6.9%	8.3%	620
Manitoba	4.0%	0.4%	0.5%	768
Saskatchewan	4.3%	0.4%	0.5%	881
Alberta	6.7%	1.0%	1.2%	556
British Columbia	15.1%	3.8%	4.1%	366
Yukon	3.6%	0.5%	0.6%	641
Northwest Territories	2.9%	0.3%	0.4%	723
Nunavut	0.6%	0.0%	0.0%	1231
Own State	79.4%	79.6%	79.6%	100
Other parts of the U.S.	98.2%	90.3%	90.5%	109
Mexico	27.0%	13.1%	13.6%	199
Caribbean	27.0%	12.3%	12.7%	212
All other destinations	23.4%	9.1%	9.5%	245

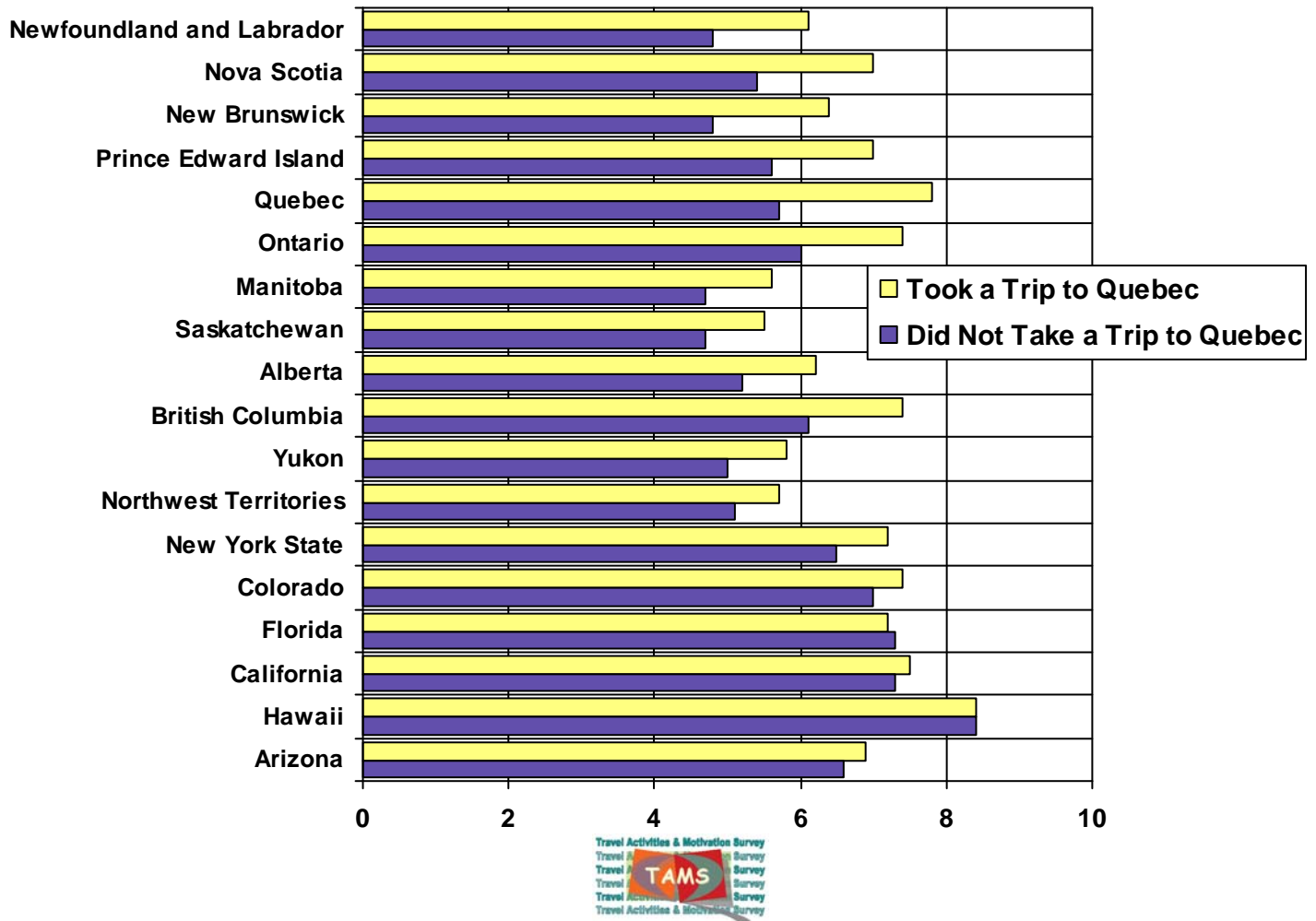
**Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories**

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 Quebec have a much more favourable impression of all Canadian destinations than the average U.S. Pleasure Traveller, and in particular, Quebec, Ontario, the Atlantic Region and British Columbia. Quebec (7.8) received the highest rating of the Canadian destinations, followed by Ontario (7.4) and British Columbia (7.4).

While U.S. Pleasure Travellers who visited Quebec also have a favourable impression of the six U.S. reference states, their appeal ratings are comparable to that of other U.S. Pleasure Travellers with the exception of New York State and Colorado. Hawaii (8.4) received the highest appeal rating among all of the destinations.

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 Quebec are much more active than the average U.S. Pleasure Traveller in culture and entertainment pursuits while on trips. The most frequent activities undertaken include shopping and dining, visits to historical sites, museums and art galleries and visits to casinos, live theatre and comedy clubs. Relative to the average U.S. Pleasure Traveller, they were much more likely to have taken part in participatory cultural activities (e.g., participatory historical activities, aboriginal cultural experiences, archaeological digs and sites) and to have attended high art performances, theatre, film and music festivals and garden-themed attractions. Their interests reflect the maturity and affluence of this travel segment.

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 Quebec	Did Not Take a Trip to Quebec	Pleasure Travellers	Index
Size of Market	5,276,757	165,233,484	170,510,241	100
Shopping and Dining	86.9%	77.4%	77.7%	112
Historical Sites, Museums & Art Galleries	76.8%	52.7%	53.5%	144
Casino, Theatre and Comedy Clubs	64.0%	44.8%	45.4%	141
Fairs and Festivals	60.6%	40.3%	41.0%	148
Theme Parks & Exhibits	58.2%	48.7%	49.0%	119
Fine Dining and Spas	54.5%	32.3%	33.0%	166
Wine, Beer and Food Tastings	45.4%	22.2%	22.9%	198
Science and Technology Exhibits	42.3%	24.2%	24.8%	171
Garden Theme Attractions	31.8%	13.1%	13.7%	233
Agro-Tourism	26.2%	13.1%	13.5%	194
Professional Sporting Events	26.1%	15.8%	16.1%	162
High Art Performances	26.0%	10.5%	10.9%	238
Equestrian & Western Events	24.5%	15.2%	15.5%	158
Rock Concerts and Recreational Dancing	24.0%	15.0%	15.3%	158
Theatre, Film & Musical Festivals	21.2%	7.9%	8.3%	255
Aboriginal Cultural experiences	17.6%	8.3%	8.6%	205
Archaeological Digs & Sites	12.0%	5.3%	5.5%	218
Amateur Tournaments	11.9%	7.5%	7.7%	155
Participatory Historical Activities	10.6%	3.7%	3.9%	270
National & International Sporting Events	5.7%	1.7%	1.9%	306

### Culture and Entertainment Activities Pursued While Not on Trips

U.S. Pleasure Travellers who visited Quebec are also very active in cultural pursuits while NOT travelling. This segment frequently dines in local restaurants and visits local festivals or fairs. Relative to the average U.S. Pleasure Traveller, they were also much more likely to patronize local live art performances (e.g., the opera, ballet, classical music concerts, live theatre, jazz clubs) and to visit local museums, art galleries and art shows and botanical gardens. They also frequently visit day spas and go dancing while not travelling. On the other hand, reflecting the age of these travellers, they are less likely to go to an amusement or theme park, a zoo or aquarium or a rodeo.

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

	Took a Trip to Quebec	Did Not Take a Trip to Quebec	Pleasure Travellers	Index
Size of Market	5,276,757	165,233,484	170,510,241	100
Going out to eat in restaurants	95.3%	92.8%	92.8%	103
Going to festivals or fairs	71.6%	65.3%	65.5%	109
Going to historic sites or heritage buildings	55.6%	39.6%	40.1%	139
Going to museums	53.0%	37.0%	37.5%	141
Going to live theatre	46.8%	28.6%	29.2%	161
Going to zoos or aquariums	45.1%	45.7%	45.6%	99
Going to art galleries or art shows	44.9%	27.2%	27.8%	162
Going to professional sporting events	43.0%	34.6%	34.9%	123
Going to amateur sporting events	40.6%	39.9%	39.9%	102
Going to pick-your-own farms or farmers' market	37.9%	31.4%	31.6%	120
Going to amusement or theme parks	36.0%	38.2%	38.1%	94
Going to gamble in casinos	32.4%	27.9%	28.0%	116
Going to botanical gardens	30.9%	19.6%	20.0%	155
Going dancing	28.8%	20.6%	20.8%	138
Going to bars with live pop or rock bands	28.3%	23.4%	23.6%	120
Going to classical music concerts	28.0%	14.5%	14.9%	188
Going to rock music concerts	24.9%	21.2%	21.3%	117
Going to day spas	16.0%	10.1%	10.3%	156
Going to jazz clubs	14.3%	7.7%	7.9%	181
Going to the opera	13.8%	5.5%	5.7%	241
Going to the ballet	13.7%	6.8%	7.0%	194
Staying overnight in a hotel or B&B in your own city	13.1%	10.5%	10.6%	124
Going to rodeos	8.0%	8.2%	8.2%	98

### Outdoor Activities Pursued While on Trips

Despite the maturity of this travel segment, those who visited Quebec were much more active than the average U.S. Pleasure Traveller in outdoor activities while on trips during the past two years. Relative to the average U.S. Pleasure Traveller, they were twice as likely to have participated in most winter sports (e.g., cross-country skiing, downhill skiing, ice-skating) reflecting the fact that this energetic travel segment is concentrated in the northern U.S. states close to Quebec. They were also much more likely to have gone sailing and surfing and scuba diving and snorkelling 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 Quebec	Did Not Take a Trip to Quebec	Pleasure Travellers	Index
Size of Market	5,276,757	165,233,484	170,510,241	100
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	53.1%	39.1%	39.6%	134
Wildlife Viewing	51.1%	34.4%	34.9%	146
Hiking, Climbing & Paddling	35.9%	23.1%	23.5%	153
Boating & Swimming (e.g., motorboating, swimming in lakes)	30.4%	20.7%	21.0%	144
Games & Individual Sports (e.g., tennis, board games)	28.1%	22.0%	22.2%	126
Exercising & Jogging	25.0%	13.7%	14.1%	177
Fishing	20.2%	18.8%	18.8%	108
Downhill Skiing & Snowboarding	18.6%	7.7%	8.0%	232
Golfing	16.6%	10.5%	10.7%	155
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	13.4%	4.5%	4.8%	281
Cycling	13.3%	6.1%	6.3%	210
Team Sports (e.g., football, baseball, basketball)	11.3%	7.8%	7.9%	143
Snowmobiling & ATVing	10.6%	7.0%	7.1%	149
Horseback Riding	10.5%	6.0%	6.2%	171
Board & Blade (e.g., skateboarding, ice-skating)	9.8%	3.8%	4.0%	244
Scuba & Snorkeling	9.2%	3.9%	4.1%	227
Cross-country Skiing & Snowshoeing	7.2%	1.7%	1.9%	387
Extreme Air Sports (e.g., parachuting, bungee jumping)	7.2%	1.5%	1.7%	419
Hunting	6.8%	5.4%	5.4%	127
Motorcycling	3.9%	3.0%	3.1%	126
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	1.7%	0.3%	0.3%	510



### Accommodation Stayed In While on Trips

Resorts (e.g., seaside resorts, lakeside / riverside resorts, ski or mountain resorts) were the most popular accommodation used by those who visited Quebec, reflecting this segment's preference for luxury accommodation. Relative to the average U.S. Pleasure Traveller, they were also especially likely to have stayed at accommodation that specialized in fine cuisine (e.g., country inn or resort with gourmet dining, cooking or wine tasting school, health spa) as well as remote wilderness lodges or outposts.

Fig. 11 Accommodation Stayed In While on Trips

	Took a Trip to Quebec	Did Not Take a Trip to Quebec	Pleasure Travellers	Index
Size of Market	5,276,757	165,233,484	170,510,241	100
Seaside Resort	29.5%	18.0%	18.3%	161
Lakeside / Riverside Resort	23.3%	12.1%	12.4%	187
A Public Campground in a National, State, Provincial or Municipal Park	21.4%	16.8%	16.9%	127
Ski Resort or Mountain Resort	21.1%	8.6%	9.0%	235
A Private Campground	14.6%	10.0%	10.2%	143
Health Spa	7.5%	3.0%	3.1%	240
A Camp Site in a Wilderness Setting (Not a Campground)	7.4%	4.6%	4.7%	157
Wilderness Lodge You Can Drive to by Car	7.0%	3.4%	3.5%	201
A Motor Home or RV while Travelling or Touring (Not a Camping Trip)	6.1%	4.2%	4.2%	144
Country Inn or Resort with Gourmet Restaurant	5.8%	1.9%	2.0%	290
Farm or Guest Ranch	4.6%	1.9%	2.0%	231
Remote or Fly-In Wilderness Lodge	4.2%	0.7%	0.8%	515
On a Houseboat	3.2%	1.4%	1.4%	227
Remote or Fly-In Wilderness Outpost	2.3%	0.4%	0.4%	527
Wine Tasting School	1.7%	0.4%	0.4%	410
Cooking School	1.7%	0.5%	0.6%	291

### Tours and Cruises Taken During Past Two Years

Those who visited Quebec were much more likely than the average U.S. Pleasure Traveller to have taken tours and cruises during the last two years. City tours and sameday tours (both organized and self-guided) were the most popular. However, they were especially likely (relative to the average U.S. Pleasure Traveller) to have taken cruises (e.g., Caribbean cruises, Alaskan cruises) during the last two years, and in particular, cruises on the St. Lawrence River or Great Lakes. This segment is also highly interested in organized tours and tours of wineries, factories and casinos. This suggests that the marketing of Quebec to U.S. travellers should emphasize opportunities for sight-seeing tours and cruises.

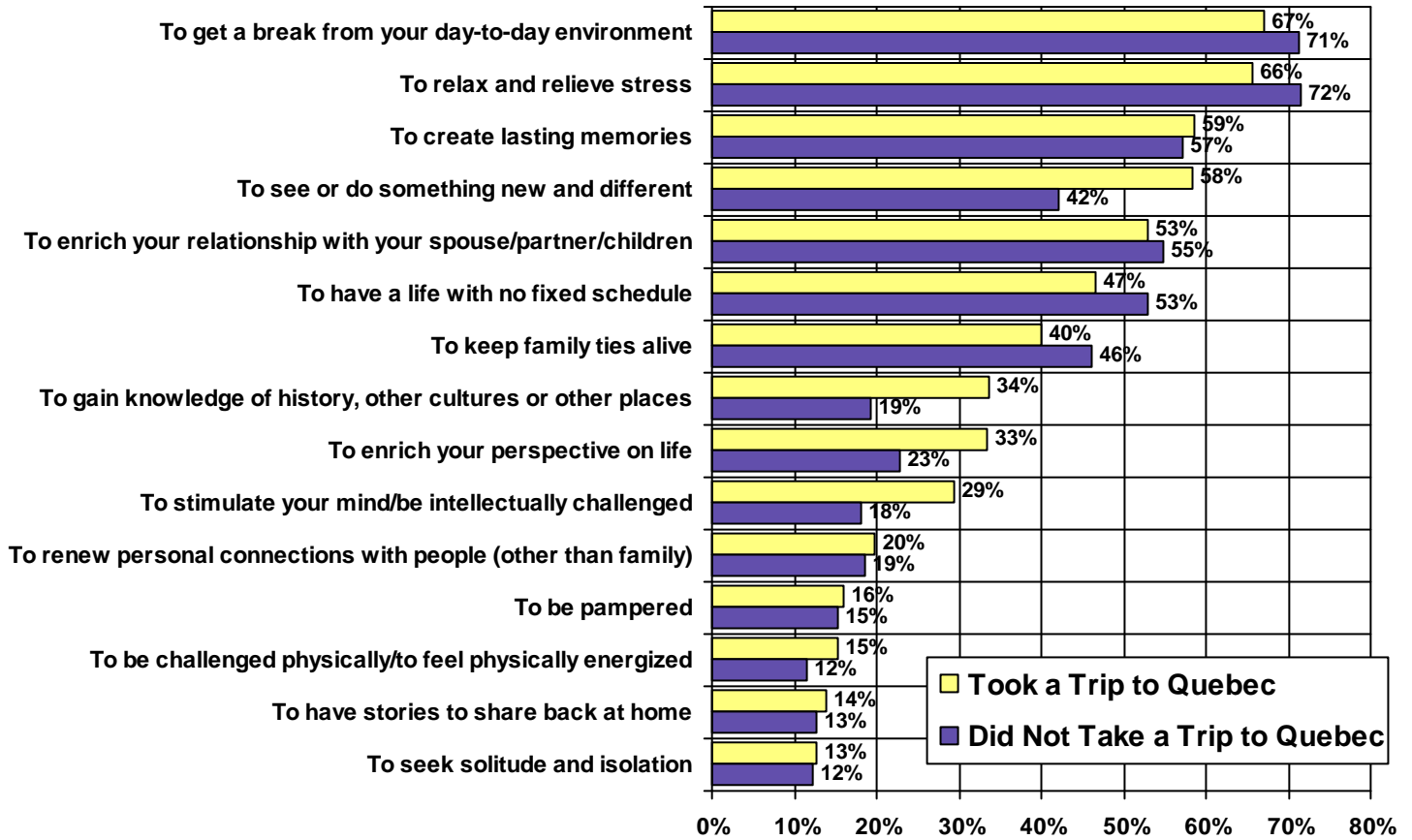
Fig. 12 Tours and Cruises Taken During Past Two Years

	Took a Trip to Quebec	Did Not Take a Trip to Quebec	Pleasure Travellers	Index
Size of Market	5,276,757	165,233,484	170,510,241	100
Around the city	33.6%	15.2%	15.8%	213
An organized, sameday, guided tour while on an overnight trip	33.0%	18.1%	18.5%	178
A self-guided, sameday tour while on an overnight trip	32.7%	18.8%	19.2%	170
Around the country side - scenic drives	25.6%	12.7%	13.1%	196
An organized, overnight, guided tour where you stayed in different locations	23.5%	7.4%	7.9%	299
A self-guided, overnight tour where you stayed in different locations	23.3%	10.0%	10.4%	225
On the water (sightseeing cruise)	18.7%	7.4%	7.8%	241
Caribbean ocean cruise	17.4%	8.7%	9.0%	193
An organized, overnight, guided tour where you stayed in a single location	14.7%	6.5%	6.7%	218
Some other type of tour	14.2%	8.7%	8.8%	161
Ocean cruise - Other	12.8%	4.5%	4.8%	266
Wilderness tour	12.7%	7.3%	7.4%	171
To a winery	12.2%	3.3%	3.6%	341
To a casino	10.9%	4.7%	4.9%	223
Alaskan ocean cruise	8.4%	2.3%	2.5%	336
Cruise on another lake or river	7.4%	1.8%	2.0%	373
Cruise on the St. Lawrence River	5.9%	0.1%	0.3%	2059
Some other type of cruise	5.8%	1.6%	1.7%	339
To a factory	5.7%	1.7%	1.8%	312
In the air as a pilot or passenger of an airplane or helicopter	5.0%	1.3%	1.4%	352
Great Lakes cruise	1.6%	0.3%	0.4%	418
Submarine cruise	1.4%	0.2%	0.2%	567

### Benefits Sought While on Vacation

As with most U.S. Pleasure Travellers, those who visited Quebec take a vacation to get a break from their day-to-day environment, relax and relieve stress, create lasting memories and enrich family relationships. However, relative to other U.S. Pleasure Travellers, those who visited Quebec are especially likely to seek 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 Quebec should promote its distinctive culture and opportunities to be intellectually stimulated to the American marketplace.

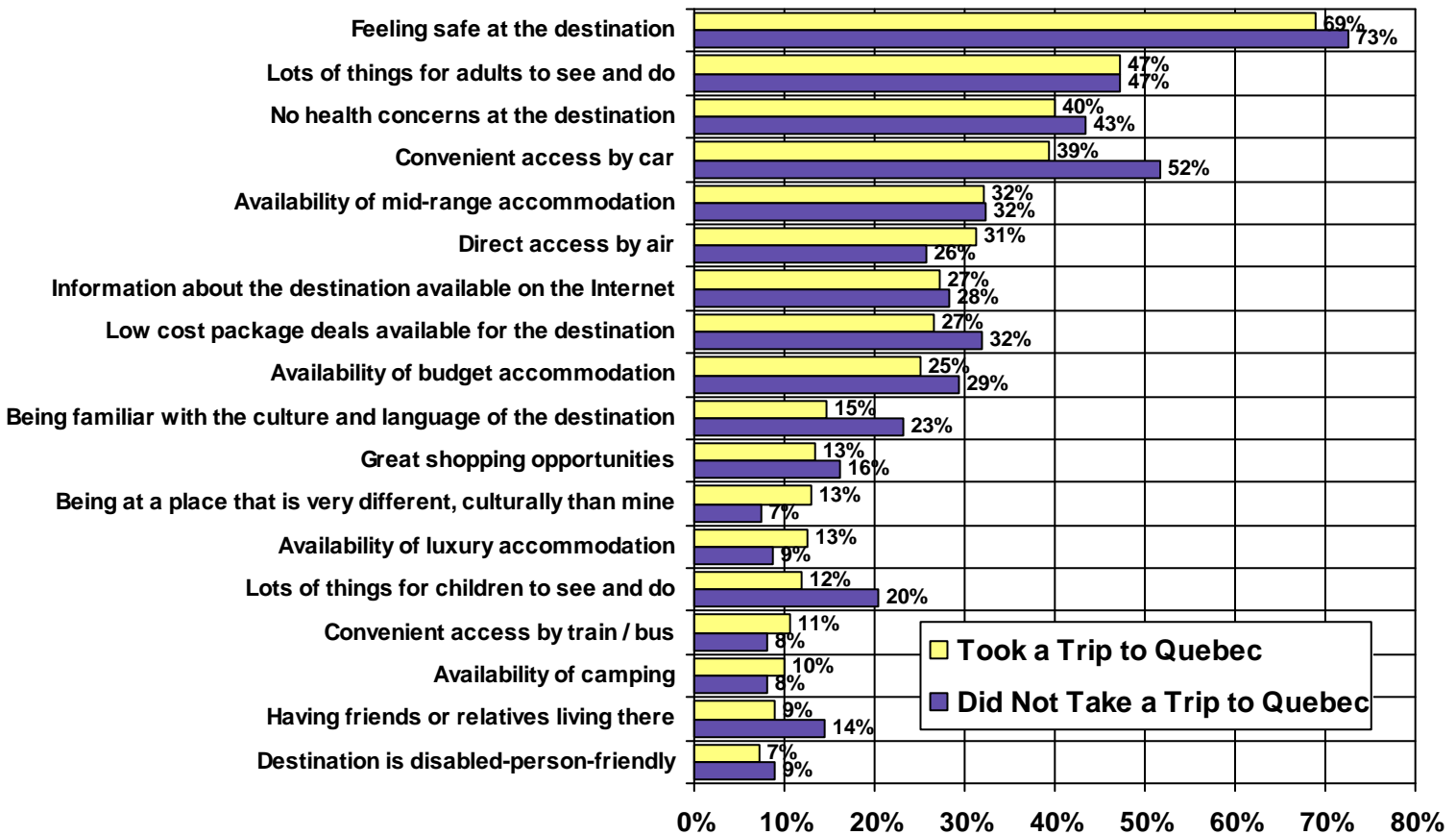
Fig.13 Benefits Sought While on Vacation  
(Percent Rating Each Benefit as “Highly Important”)



### Other Attributes of a Destination Considered Important

As with most U.S. Pleasure Travellers, Americans who visited Quebec consider it important that they feel safe at a destination. However, relative to other U.S. Pleasure Travellers, they are more likely to consider it important that the destination has a distinct culture and luxury accommodation and is directly accessible by air. On the other hand, they are less concerned whether the destination is conveniently accessible by car, has lots of activities for children to see and do, offers great shopping opportunities or has 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 Quebec visitors start planning vacations with a particular destination in mind. However, those who have visited Quebec in the last two years are more likely than the average U.S. Pleasure Traveller to begin planning winter 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 Quebec	Did Not Take a Trip to Quebec	Pleasure Travellers	Index
Size of Market	5,276,757	165,233,484	170,510,241	100
<b>Summer</b>				
Started with a desired destination in mind	60.3%	58.1%	58.2%	104
Started by considering specific activities wanted to do	10.0%	9.9%	9.9%	101
Started with a certain type of vacation experience in mind	18.7%	17.2%	17.3%	108
Looked for packaged deals - no destination in mind	1.6%	1.1%	1.1%	140
Considered something else first	3.6%	4.6%	4.6%	78
Don't know / Other	5.8%	9.0%	8.9%	66
<b>Winter</b>				
Started with a desired destination in mind	61.8%	58.8%	58.9%	105
Started by considering specific activities wanted to do	14.5%	11.1%	11.3%	129
Started with a certain type of vacation experience in mind	14.1%	14.8%	14.8%	96
Looked for packaged deals - no destination in mind	1.6%	1.4%	1.4%	113
Considered something else first	3.8%	5.4%	5.3%	71
Don't know / Other	4.1%	8.4%	8.3%	49

### Trip Planning and Information Sources Consulted

Similar to the average U.S. Pleasure Traveller, most of those who took a trip to Quebec were responsible for planning their trips either on their own (43.1%) or with someone else (17.0%). When making vacation plans, they tended to consult a wider variety of sources than the average U.S. Pleasure Traveller. The majority use Internet websites, past experience and word-of-mouth as sources to plan travel. However, visitors to Quebec are more likely than others to obtain travel information from travel guidebooks such as Fodor's, television programs, travel agents and official travel brochures and information centers of specific states or provinces.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Took a Trip to Quebec	Did Not Take a Trip to Quebec	Pleasure Travellers	Index
Size of Market		5,276,757	165,233,484	170,510,241	100
Who Plans Trips?	Respondent plans trips	43.1%	39.1%	39.2%	110
	Trip planning a shared responsibility	17.0%	17.6%	17.6%	96
	Someone else plans trips	40.0%	43.3%	43.2%	92
Information Sources Consulted	An Internet website	81.9%	75.8%	76.0%	108
	Past experience / Been there before	61.9%	54.2%	54.5%	114
	Advice of others / Word-of-mouth	53.6%	45.1%	45.4%	118
	Maps	44.3%	32.3%	32.7%	136
	An auto club such as AAA	37.3%	23.6%	24.0%	155
	Official travel guides or brochures from state / province	36.5%	20.0%	20.6%	177
	A travel agent	33.9%	18.1%	18.6%	182
	Articles in newspapers / magazines	32.9%	17.6%	18.1%	181
	Visitor information centres	29.6%	20.1%	20.4%	145
	Travel guide books such as Fodor's	29.2%	11.4%	12.0%	243
	Travel information received in the mail	25.1%	15.4%	15.8%	159
	Advertisements in newspapers / magazines	17.3%	10.7%	10.9%	159
	Programs on television	13.8%	6.9%	7.1%	194
	An electronic newsletter or magazine received by e-mail	11.2%	5.8%	6.0%	187
	Visits to trade, travel or sports shows	5.8%	2.3%	2.4%	238
Advertisements on television	5.2%	3.9%	4.0%	129	

### Use of the Internet to Plan and Arrange Trips

Those who took a trip to Quebec are above-average users of the Internet to research (77.4%) and book travel (58.3%). The majority use travel planning / booking websites (e.g., Expedia), hotel or resort websites and airline websites. However, they are more likely than other U.S. Pleasure Travellers to visit the website of a specific region, country or city as well as the websites of cruise lines or motorcoach lines. As with most U.S. Pleasure Travellers, Quebec visitors most often use the Internet to purchase airline tickets and accommodation. However, relative to the average U.S. Pleasure Traveller, they are more likely than others to use the Internet to rent cars, purchase travel packages, obtain tickets for specific attractions and purchase fares for travel by rail, bus or boat / ship.

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

		Took a Trip to Quebec	Did Not Take a Trip to Quebec	Pleasure Travellers	Index
Size of Market		5,276,757	165,233,484	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	22.6%	31.2%	31.0%	73
	Uses Internet to plan trips only	19.1%	20.1%	20.1%	95
	Uses Internet to book part of trip	58.3%	48.6%	48.9%	119
Types of Websites Consulted	A travel planning / booking website	69.4%	55.1%	55.6%	125
	A website of a hotel or resort	60.2%	53.1%	53.3%	113
	An airline website	58.8%	45.1%	45.6%	129
	A tourism website of a country / region / city	50.9%	34.5%	35.1%	145
	A website of an attraction	37.5%	33.2%	33.4%	112
	Some other website	28.4%	24.9%	25.1%	113
	A cruise line website	21.8%	12.1%	12.4%	175
	A motorcoach website	2.5%	1.3%	1.3%	186
Parts of Trips Booked Over The Internet	Air tickets	82.5%	70.1%	70.6%	117
	Accommodation	79.4%	71.6%	71.9%	110
	Car rental	57.4%	37.2%	38.0%	151
	Tickets or fees for specific activities or attractions	35.8%	26.0%	26.3%	136
	A package containing two or more items	26.6%	17.5%	17.8%	150
	Tickets for rail, bus or boat / ship fares	23.5%	11.4%	11.9%	198
	Other	5.3%	2.8%	2.9%	180



<b>Appendix One</b>		
<b>U.S. TAMS 2006 Culture and Entertainment Segmentation</b>		
<b>Activity Segment</b>	<b>Activities in Segment</b>	
<b>Historical Sites, Museums &amp; Art Galleries</b>	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
<b>Shopping &amp; Dining</b>	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
<b>Aboriginal Cultural Experiences</b>	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
<b>Fairs &amp; Festivals</b>	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
<b>Science &amp; Technology Exhibits</b>	Science or Technology Museums	Children's Museums
	Science & Technology Theme Parks	Went to an Imax Movie Theatre
	Planetarium	
<b>Theme Parks &amp; Exhibits</b>	Amusement Park	Aquariums
	Water Theme Park	Zoos
	Movie Theme Park	Wax Museums
<b>High Art Performances</b>	Classical or Symphony Concert	Ballet or Other Dance Performances
	Opera	Jazz Concert
<b>Professional Sporting Events</b>	Professional Football Games	Professional Golf Tournaments
	Professional Basketball Games	Professional Ice Hockey Games
	Professional Baseball Games	
<b>Theatre, Film &amp; Musical Festivals</b>	Theatre Festivals	International Film Festivals
	Comedy Festivals	Music Festivals
	Literary Festivals or Events	
<b>Tastings</b>	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)
<b>Casino, Theatre &amp; Comedy Clubs</b>	Stand-Up Comedy Clubs and Other Variety Shows	Live Theatre with Dinner
	Went to a Casino	Live Theatre
<b>Participatory Historical Activities</b>	Historical Re-Enactments (as an Actor)	Interpretive Program at a Historic Site or National/Provincial Park
	Curatorial Tours	
<b>National &amp; International Sporting Events</b>	National/International Sporting Events such as the Olympic Games	Curling Bonspiel
	Professional Figure Skating	Professional Soccer Games

<b>Appendix One</b>		
<b>U.S. TAMS 2006 Culture and Entertainment Segmentation</b>		
<b>Gardens Theme Attractions</b>	Garden Theme Park	Botanical Gardens
<b>Rock Concerts &amp; Dancing</b>	Rock & Roll / Popular Music Concert	Recreational Dancing
<b>Archaeological Digs &amp; Sites</b>	Archaeological Digs	Paleontological / Archaeological Sites
<b>Equestrian &amp; Western Events</b>	Equine (Horse) Competitions	Country / Western Music Concerts
	Western Theme Events (e.g., Rodeos)	Auto Races
	Horse Races	
<b>Fine Dining &amp; Spas</b>	High-End Restaurants with an International Reputation	Day Visit to a Health and Wellness Spa while on an Overnight Trip
	Other High-End Restaurants	
<b>Agro-Tourism</b>	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)
<b>Amateur Tournaments</b>	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	