

CANADIAN TRAVEL MARKET

Shopping and Dining While on Trips Of One or More Nights

A Profile Report

November 3, 2007

Prepared by Lang Research Inc. on behalf of:

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



Shopping & Dining While on Trips

Executive Summary

Over the last two years, 61.7% (15,281,873) of adult Canadians went shopping or dining while on an out-of-town, overnight trip of one or more nights. Travellers were most likely to have shopped for clothing, shoes and jewellery (43.0%), followed by books or music (31.4%), arts and crafts (28.4%), antiques (17.7%), gourmet foods (13.3%) and garden products (13.0%). In terms of dining, restaurants offering local ingredients and recipes were the most popular (43.1%) followed by outdoor cafés (29.5%), high-end restaurants (20.5%) and high-end restaurants with an international reputation (13.0%). Shopping and dining was the most common activity undertaken by Canadian Pleasure Travellers while on trips in the past two years. However, shopping and dining is rarely identified as the main reason for taking a trip (16.2%; 2,473,398) in the past two years.

Demographically, Shoppers and Diners are similar to the average Canadian Pleasure Traveller in terms of gender, age, marital status and parental status. They are slightly more likely to have a university degree (32.8%) and their household incomes (\$75,049) are slightly above-average. They are well-represented in all parts of Canada.

Shoppers and Diners traveled less frequently than the other activity types. They were the least likely of the 21 culture and entertainment activity types to have taken a trip within their own province or region (86.9%), the least likely to have traveled to an adjacent province or region (50.5%) and the least likely to have visited a non-adjacent province or region (33.7%). Their out-of-country travel is also below-average. They were the second least likely to have visited the United States (53.4%), the 17th most likely to have visited Mexico (13.6%), the 16th most likely to have taken a trip to the Caribbean (16.3%) and the 17th most likely to have traveled overseas (30.7%).

The outdoor activities and culture and entertainment activities pursued on trips by Shoppers and Diners are comparable to those of the typical Canadian Pleasure Traveller. However, Shopper and Diners are slightly more likely to participate in wine, beer and food tastings, visit spas and take part in participatory educational events and attractions (e.g., participatory historical activities, agro-tourism). They were also slightly more likely to have taken recent tours and cruises. Shoppers and Diners prefer relaxing, unstructured vacations that are intellectually stimulating, offer novelty and opportunities to learn, and provide great shopping opportunities.

Shoppers and Diners are average users of the Internet to plan (62.9%) and book (40.3%) travel. They are also average users of travel media. They can be most effectively targeted through fashion and beauty magazines, shopping channels / websites and contemporary 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 Canadian database is used in this current report. This survey was conducted by Statistics Canada. 31,699 completed questionnaires were returned. The data have been weighted to project the results to the Canadian population.

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

Shopping & Dining While on Trips

Market Incidence

Over the last two years, 61.7% (15,281,873) of adult Canadians went shopping or dining while on an out-of-town, overnight trip of one or more nights. Travellers were most likely to have shopped for clothing, shoes and jewellery (43.0%), followed by books or music (31.4%), arts and crafts (28.4%), antiques (17.7%), gourmet foods (13.3%) and garden products (13.0%). In terms of dining, restaurants offering local ingredients and recipes were the most popular (43.1%), followed by outdoor cafés (29.5%), high-end restaurants (20.5%) and high-end restaurants with an international reputation (13.0%).

Shopping and dining was the most common activity undertaken by Canadian Pleasure Travellers while on trips in the past two years. However, shopping and dining is rarely the main reason for travel as only 16.2% (2,473,398) reported that this activity was the main reason for taking a trip.

Fig. 1 Incidence of Shopping & Dining While on Trips¹

	Number of Shopper & Diners ²	Percent Main Reason for Trip ³	Percent of Pleasure Travellers ⁴	Percent of Total Canadian Population ⁵
Size of Market	15,281,873	2,473,398	18,439,508	24,776,103
Shopping & Dining (All Activities)	15,281,873	16.2%	82.9%	61.7%
Dining at restaurants offering local ingredients & recipes	10,676,869	9.2%	57.9%	43.1%
Shopping / Browsing for clothing, shoes & jewelry	10,648,612	11.9%	57.7%	43.0%
Shopping / Browsing in book or music stores	7,772,018	7.8%	42.1%	31.4%
Dining at local outdoor cafés	7,301,693	6.9%	39.6%	29.5%
Shopping / Browsing in local arts & crafts studios/exhibitions	7,026,378	8.0%	38.1%	28.4%
Dining at other high-end restaurants	5,089,437	9.5%	27.6%	20.5%
Shopping / Browsing for antiques	4,374,965	8.4%	23.7%	17.7%
Shopping / Browsing for gourmet foods in retail stores	3,307,309	7.9%	17.9%	13.3%
Dining at high-end restaurants with international reputation	3,228,736	11.5%	17.5%	13.0%
Shopping / Browsing at greenhouses/garden centres	3,079,744	12.4%	16.7%	12.4%
Participated in all ten activities	235,767	8.4%	1.3%	1.0%

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

Incidence by Region

Shoppers and Diners are well-represented in all provinces in Canada.

Fig. 2 Geographic Distribution of Those Who Went Shopping & Dining While on Trips

	Total Population	Estimated Number Who Went Shopping & Dining on a Trip	Percent of Pleasure Travellers in Region Who Went Shopping & Dining on a Trip	Percent of Total Regional Population Who Went Shopping & Dining on a Trip
Canada	24,776,103	15,281,873	82.9%	61.7%
Atlantic Provinces	1,822,494	1,062,666	83.8%	58.3%
Quebec	5,940,869	3,457,758	82.4%	58.2%
Ontario	9,671,592	5,790,482	80.8%	59.9%
Manitoba	843,107	504,695	84.8%	59.9%
Saskatchewan	706,325	450,111	83.1%	63.7%
Alberta	2,465,540	1,708,904	85.2%	69.3%
British Columbia	3,326,176	2,307,258	86.7%	69.4%

Demographic Profile

Demographically, Shoppers and Diners are similar to the average Canadian Pleasure Traveller in terms of age, marital status and parental status. They are slightly more likely to be female (52.9%) and to have a university degree (32.8%). Their household incomes (\$75,049) are also slightly higher than the average Canadian Pleasure Traveller.

Fig. 3 Demographic Profile of Shoppers and Diners Relative to All Canadian Pleasure Travellers

Attribute	Size of Market	Went Shopping & Dining	Did Not Go Shopping & Dining ¹	Pleasure Travellers	Index ²
		15,281,873	3,157,635	18,439,508	100
Gender	Male	47.1%	57.0%	48.8%	97
	Female	52.9%	43.0%	51.2%	103
Age of Respondent	18 to 24	13.2%	11.0%	12.8%	103
	25 to 34	19.4%	18.6%	19.3%	101
	35 to 44	20.1%	22.6%	20.5%	98
	45 to 54	20.8%	18.0%	20.3%	102
	55 to 64	14.4%	13.0%	14.1%	102
	65 Plus	12.1%	16.9%	12.9%	94
Average Age		44.3	45.9	44.5	N/A
Marital Status	Not married	31.8%	34.1%	32.2%	99
	Married	68.2%	65.9%	67.8%	101
Parental Status	No children under 18	71.3%	70.0%	71.1%	100
	Children under 18	28.7%	30.0%	28.9%	99
Education	High school or less	34.0%	46.9%	36.2%	94
	Some post-secondary	11.4%	10.2%	11.2%	102
	Post-secondary diploma/certificate	22.0%	21.5%	21.9%	100
	University degree	32.6%	21.5%	30.7%	106
Household Income	Under \$20,000	5.2%	8.4%	5.7%	90
	\$20,000 to \$39,999	13.4%	19.8%	14.5%	92
	\$40,000 to \$59,999	16.3%	17.7%	16.5%	99
	\$60,000 to \$79,999	15.3%	15.0%	15.2%	100
	\$80,000 to \$99,999	12.4%	11.4%	12.2%	101
	\$100,000 or more	24.8%	13.1%	22.8%	109
	Not stated	12.7%	14.6%	13.0%	97
Average Household Income		\$75,049	\$61,838	\$72,829	N/A

- 1 - "Did Not Go Shopping & Dining" is defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years but did not go shopping or dining on any trip. The number of Shoppers and Diners and those who did not go shopping & dining equals the number of Pleasure Travellers.
- 2 - The "Index" is calculated by dividing the percent for Shoppers and Diners in each group by the percent of Pleasure Travellers in each group. The Index indicates the extent to which Shoppers and Diners are over or under-represented relative to the average Pleasure Traveller. An index of 100 means the percent participating in the activity is the same as that of the average Canadian Pleasure Traveller. Index values over 100 indicate that those participating in the activity are over-represented relative to the average Canadian Pleasure Traveller. Index values less than 100 indicate that those participating in the activity are under-represented relative to the average Canadian Pleasure Traveller.

Travel Activity (During Last Two Years)

Shoppers and Diners are less frequent travellers than other culture and entertainment activity types. They were the least likely of the 21 culture and entertainment activity types to have taken a trip within their own province or region (86.9%), the least likely to have traveled to an adjacent province or region (50.5%) and the least likely to have visited a non-adjacent province or region (33.7%). They most often took a trip in Ontario (54.3%), Quebec (40.0%) and British Columbia (32.9%).

Shopper and Diners are also below-average, out-of-country travellers. They were the second least likely of the 21 culture and entertainment activity types to have visited the United States (53.4%), the 17th most likely to have visited Mexico (13.6%), the 16th most likely to have taken a trip to the Caribbean (16.3%) and the 17th most likely to have traveled overseas (30.7%).

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

	Went Shopping & Dining	Did Not Go Shopping & Dining	Pleasure Travellers	Index
Size of Market	15,281,873	3,157,635	18,439,508	100
Canada	95.1%	92.9%	94.8%	100
Took a trip within own province / region	86.6%	82.1%	85.9%	101
Took a trip to an adjacent province / region	50.5%	38.9%	48.6%	104
Took a trip to non-adjacent province / region	33.7%	20.7%	31.4%	107
Newfoundland and Labrador	4.6%	2.9%	4.3%	107
Prince Edward Island	7.6%	5.1%	7.2%	106
New Brunswick	12.5%	8.5%	11.8%	106
Nova Scotia	13.3%	9.8%	12.7%	105
Quebec	40.0%	33.9%	38.9%	103
Ontario	54.3%	49.6%	53.5%	102
Manitoba	9.8%	6.2%	9.2%	107
Saskatchewan	12.1%	8.0%	11.4%	106
Alberta	27.4%	18.4%	25.8%	106
British Columbia	32.9%	19.9%	30.6%	107
Yukon	1.0%	0.8%	1.0%	105
Northwest Territories	0.7%	0.4%	0.7%	108
Nunavut	0.3%	0.2%	0.3%	105
United States	53.4%	37.6%	50.7%	105
Mexico	13.6%	6.3%	12.4%	110
Caribbean	16.3%	12.3%	15.6%	104
All other destinations	25.1%	16.7%	23.6%	106

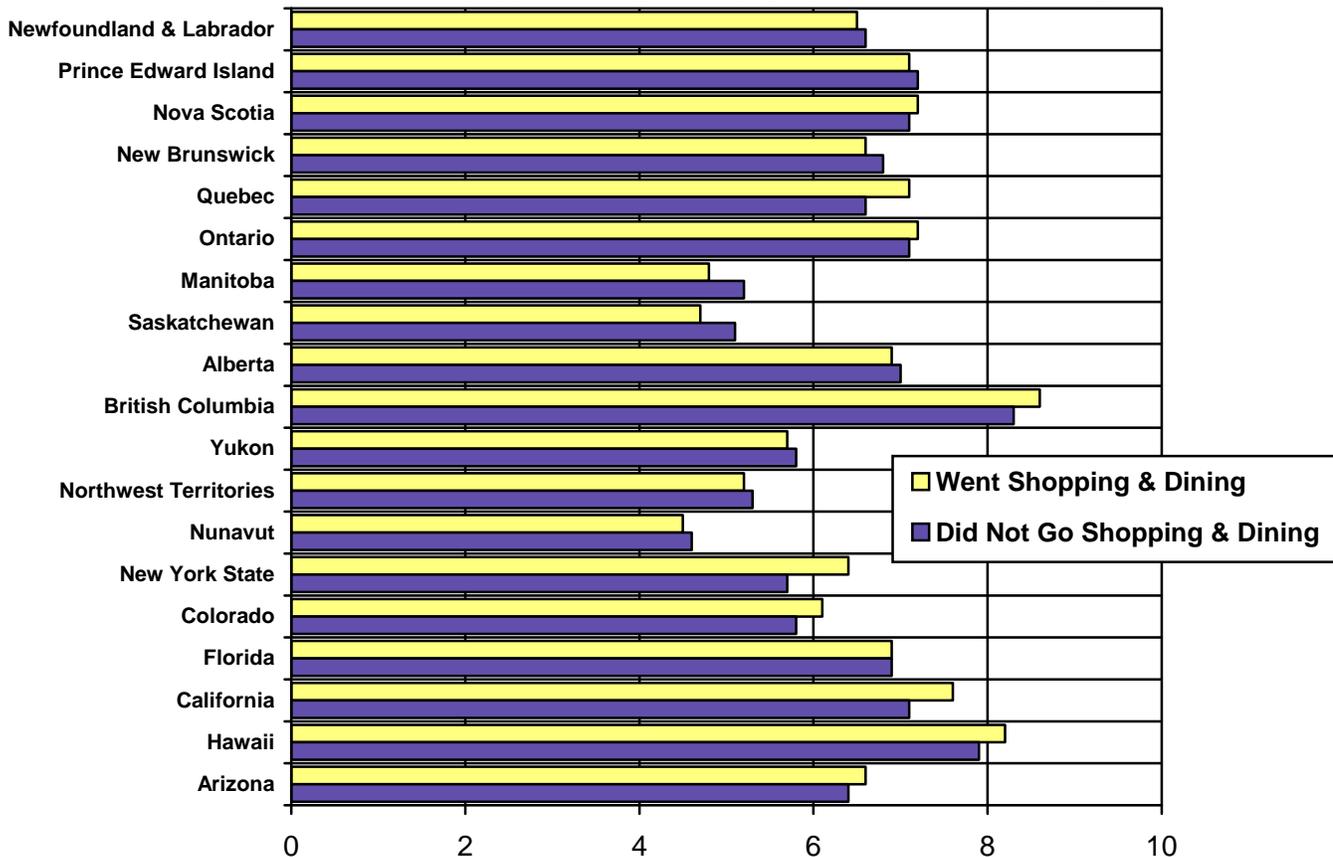
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Shoppers and Diners perceived British Columbia (8.6) and Quebec (7.1) to be more appealing than other Canadian Pleasure Travellers. By contrast, they perceive Manitoba, Saskatchewan and the Northern Territories to be less appealing than others.

Most of the U.S. reference states were more appealing to Shoppers and Diners than to other Canadian Pleasure Travellers. Hawaii (8.2), California (7.6) and New York State (6.4) were especially more appealing to Shoppers and Diners than to other travellers.

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



Other Culture and Entertainment Activities Pursued While on Trips

Shoppers and Diners were slightly more active than the average Canadian Pleasure Traveller in most culture and entertainment activities while on trips. Similar to the typical Canadian Pleasure Traveller, Shoppers and Diners were most likely to have visited historical sites, museums and galleries, theme parks and exhibits and casinos. They were also likely to have attended fairs and festivals as well as musical concerts, music festivals and music attractions while on trips. They were slightly more likely than the average Canadian Pleasure Traveller to have participated in wine, beer and food tastings and to have visited garden theme attractions and spas, and to have attended literary and film festivals while on trips. Shoppers and Diners were also slightly more likely to have taken part in participatory educational activities (e.g., participatory historical activities, aboriginal cultural experiences, agro-tourism) while traveling.

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

	Went Shopping & Dining	Did Not Go Shopping & Dining	Pleasure Travellers	Index
Size of Market	15,281,873	3,157,635	18,439,508	100
Historical Sites, Museums & Art Galleries	65.5%	23.3%	58.3%	112
Theme Parks & Exhibits	43.4%	18.7%	39.2%	111
Fairs & Festivals	42.1%	16.3%	37.7%	112
Musical Concerts, Festivals & Attractions	36.1%	16.3%	32.7%	110
Casinos	28.7%	12.2%	25.9%	111
Wine, Beer & Food Tastings	27.6%	5.3%	23.8%	116
Science & Technology Exhibits	26.2%	8.1%	23.1%	113
Live Theatre	23.9%	7.6%	21.1%	113
Garden Theme Attractions	20.3%	4.5%	17.6%	115
Agro-Tourism	17.9%	5.1%	15.7%	114
Professional Sporting Events	17.5%	7.0%	15.7%	111
Aboriginal Cultural Experiences	13.2%	3.8%	11.6%	114
Amateur Tournaments	12.7%	7.3%	11.8%	108
High Art Performances	12.5%	3.6%	11.0%	114
Spas	11.6%	2.3%	10.0%	116
Comedy Festivals & Clubs	11.6%	3.2%	10.1%	114
Participatory Historical Activities	7.8%	1.1%	6.7%	117
Equestrian & Western Events	7.3%	3.6%	6.7%	110
National & International Sporting Events	3.6%	1.5%	3.2%	111
Literary & Film Festivals	3.0%	0.5%	2.6%	117

Culture and Entertainment Activities Pursued in a Typical Year

When not traveling, the culture and entertainment pursuits of Shoppers and Diners are similar to those of the typical Canadian Pleasure Traveller. They frequently dine in local restaurants and visit local festivals and fairs. They are slightly more likely than the average Canadian Pleasure Traveller to visit local day spas, visit local art galleries, art shows and museums and to patronize local live art performances (e.g., jazz clubs, classical music, live theatre, the ballet).

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

	Went Shopping & Dining	Did Not Go Shopping & Dining	Pleasure Travellers	Index
Size of Market	15,281,873	3,157,635	18,439,508	100
Going out to eat in restaurants	93.2%	83.6%	91.5%	102
Going to festivals or fairs	63.5%	51.4%	61.4%	103
Going to amateur sporting events	42.6%	38.9%	42.0%	102
Going to pick-your-own farms or farmers' market	41.9%	36.7%	41.0%	102
Going to historic sites or heritage buildings	41.0%	31.0%	39.3%	104
Going to live theatre	36.9%	24.6%	34.8%	106
Going to museums	34.7%	23.2%	32.7%	106
Going to art galleries or art shows	34.0%	20.8%	31.8%	107
Going to professional sporting events	33.0%	27.5%	32.1%	103
Going to zoos or aquariums	31.3%	26.1%	30.4%	103
Going dancing	31.3%	22.8%	29.9%	105
Going to amusement or theme parks	29.4%	26.5%	28.9%	102
Going to bars with live pop or rock bands	28.9%	22.0%	27.7%	104
Going to botanical gardens	26.5%	19.8%	25.4%	105
Going to rock music concerts	23.3%	18.1%	22.4%	104
Going to gamble in casinos	18.0%	18.8%	18.1%	99
Going to classical music concerts	17.7%	10.9%	16.5%	107
Going to day spas	15.0%	7.7%	13.8%	109
Staying overnight in a hotel or B&B in own city	10.6%	6.6%	9.9%	107
Going to jazz clubs	8.2%	4.2%	7.5%	109
Going to the ballet	7.7%	5.2%	7.3%	106
Going to rodeos	7.5%	6.5%	7.3%	102
Going to the opera	6.9%	4.9%	6.6%	105

Outdoor Activities Pursued While on Trips

Shoppers and Diners were slightly more active than the average Canadian Pleasure Traveller in outdoor activities while on trips. They most frequently participated in ocean activities (e.g., sunbathing, swimming in ocean), went wildlife viewing and went boating and swimming while traveling. They were also slightly more likely than average to exercise and jog, go horseback riding, play sports and games and participate in water-related, resort-based, outdoor activities (e.g., fresh water scuba diving and snorkeling, sailing and surfing). They were less likely than others to go hunting while on a trip.

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

	Went Shopping & Dining	Did Not Go Shopping & Dining	Pleasure Travellers	Index
Size of Market	15,281,873	3,157,635	18,439,508	100
Ocean Activities (e.g., swimming in ocean, sunbathing)	53.2%	26.1%	48.5%	110
Wildlife Viewing	45.6%	20.2%	41.2%	111
Boating & Swimming (e.g., motorboating, swimming in lakes)	44.2%	26.3%	41.1%	107
Hiking, Climbing & Paddling	37.1%	19.5%	34.1%	109
Sports & Games (e.g., tennis, board games)	25.2%	10.5%	22.7%	111
Fishing	23.6%	23.7%	23.6%	100
Golfing	19.9%	10.6%	18.3%	109
Exercising & Jogging	18.2%	4.8%	15.9%	114
Downhill Skiing & Snowboarding	15.8%	9.0%	14.6%	108
Cycling	14.6%	8.4%	13.5%	108
Skating (e.g., ice skating, rollerblading)	13.1%	6.3%	12.0%	110
Team Sports (e.g., hockey, baseball)	11.9%	8.9%	11.4%	104
Snowmobiling & ATVing	11.8%	9.2%	11.3%	104
Cross-country Skiing & Snowshoeing	10.3%	4.6%	9.3%	111
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	7.1%	2.5%	6.3%	112
Horseback Riding	5.5%	2.1%	4.9%	112
Hunting	4.4%	6.4%	4.7%	92
Freshwater Scuba & Snorkeling	3.4%	1.1%	3.0%	113
Motorcycling	3.1%	2.5%	3.0%	104
Wilderness Activities (e.g., wilderness skills course)	2.6%	1.2%	2.4%	111
Extreme Air Sports (e.g., parachuting)	1.2%	0.6%	1.1%	109

Outdoor Activities Pursued in a Typical Year

The outdoor activities of Shoppers and Diners while not traveling parallel those of the average Canadian Pleasure Traveller. They most frequently go on day outings to parks and picnic, exercise, swim, garden at home and go hiking while not traveling. Shoppers and Diners are slightly more likely than others to go downhill skiing and snowboarding and jogging. They are slightly less likely to go fishing, ATVing, snowmobiling and hunting while not traveling.

Fig. 9 Outdoor Activities Pursued in a Typical Year

	Went Shopping & Dining	Did Not Go Shopping & Dining	Pleasure Travellers	Index
Size of Market	15,281,873	3,157,635	18,439,508	100
Day outing to a park	68.8%	57.4%	66.9%	103
Exercising at home or at a fitness club	63.4%	49.1%	61.0%	104
Swimming	62.0%	52.0%	60.3%	103
Gardening	61.1%	53.4%	59.8%	102
Picnicking	54.6%	45.6%	53.1%	103
Hiking	50.4%	40.8%	48.8%	103
Cycling	44.6%	43.0%	44.3%	101
Camping	38.7%	38.3%	38.6%	100
Golfing	29.9%	26.9%	29.4%	102
Ice-skating	28.5%	28.6%	28.5%	100
Fishing	27.8%	36.5%	29.3%	95
Jogging	25.3%	18.2%	24.1%	105
Sailing or other boating	24.0%	21.0%	23.4%	102
Playing team sports	23.3%	21.3%	22.9%	102
Playing racquet sports (e.g., tennis or badminton)	19.8%	16.0%	19.1%	103
Canoeing or kayaking	17.4%	14.6%	16.9%	103
Downhill skiing	17.0%	12.1%	16.2%	105
Rollerblading	14.6%	13.2%	14.4%	102
Riding an all-terrain vehicle (ATV)	13.4%	18.4%	14.3%	94
Cross-country skiing	12.7%	11.1%	12.5%	102
Snowmobiling	9.3%	11.9%	9.8%	95
Hunting	7.3%	10.0%	7.7%	94
Horseback riding	6.9%	6.3%	6.8%	102
Snowboarding	5.2%	4.1%	5.0%	104
Skateboarding	1.5%	2.0%	1.6%	95

Accommodation Stayed In While on a Trip

Similar to the average Canadian Pleasure Traveller, Shoppers and Diners were most likely to have stayed in public or private campgrounds and resorts (e.g., lakeside or riverside resort, seaside resort, ski or mountain resort). Shoppers and Diners were slightly more likely than others to have stayed at resorts and accommodation that specializes in fine cuisine (e.g., resort with gourmet restaurant, cooking school).

Fig. 10 Accommodation Stayed in While on Trips

	Went Shopping & Dining	Did Not Go Shopping & Dining	Pleasure Travellers	Index
Size of Market	15,281,873	3,157,635	18,439,508	100
A Public Campground in a National, State, Provincial or Municipal Park	28.4%	16.4%	26.4%	108
Lakeside / Riverside Resort	25.0%	9.4%	22.3%	112
Seaside Resort	23.7%	6.4%	20.7%	114
A Private Campground	20.0%	13.0%	18.8%	106
Ski Resort or Mountain Resort	15.6%	5.8%	13.9%	112
A Camp Site in a Wilderness Setting (Not a Campground)	9.0%	6.5%	8.6%	105
Health Spa	6.8%	1.6%	5.9%	115
Wilderness Lodge You Can Drive to by Car	6.0%	3.9%	5.6%	106
Country Inn or Resort with Gourmet Restaurant	5.9%	1.4%	5.1%	115
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	4.9%	2.4%	4.5%	109
Farm or Guest Ranch	3.3%	1.8%	3.0%	108
Remote or Fly-In Wilderness Lodge	1.8%	0.8%	1.6%	111
On a Houseboat	1.5%	0.6%	1.4%	112
Remote or Fly-In Wilderness Outpost	0.6%	0.3%	0.6%	108
Cooking School	0.4%	LT 0.1%	0.4%	119
Wine Tasting School	0.2%	0.4%	0.3%	87

Tours and Cruises Taken During Past Two Years

Shoppers and Diners were slightly more likely than the average Canadian Pleasure Traveller to have taken tours and cruises in the past two years. They were slightly more likely than average to have taken most of the more popular types of tours including sameday tours (both guided and self-guided), city tours and scenic drives in the countryside. Shopper and Diners were also slightly more likely than others to take freshwater cruises (e.g., cruises on a lake or river, sight seeing cruises), tours of factories and wineries, wilderness tours and air tours by airplane or helicopter in the past two years.

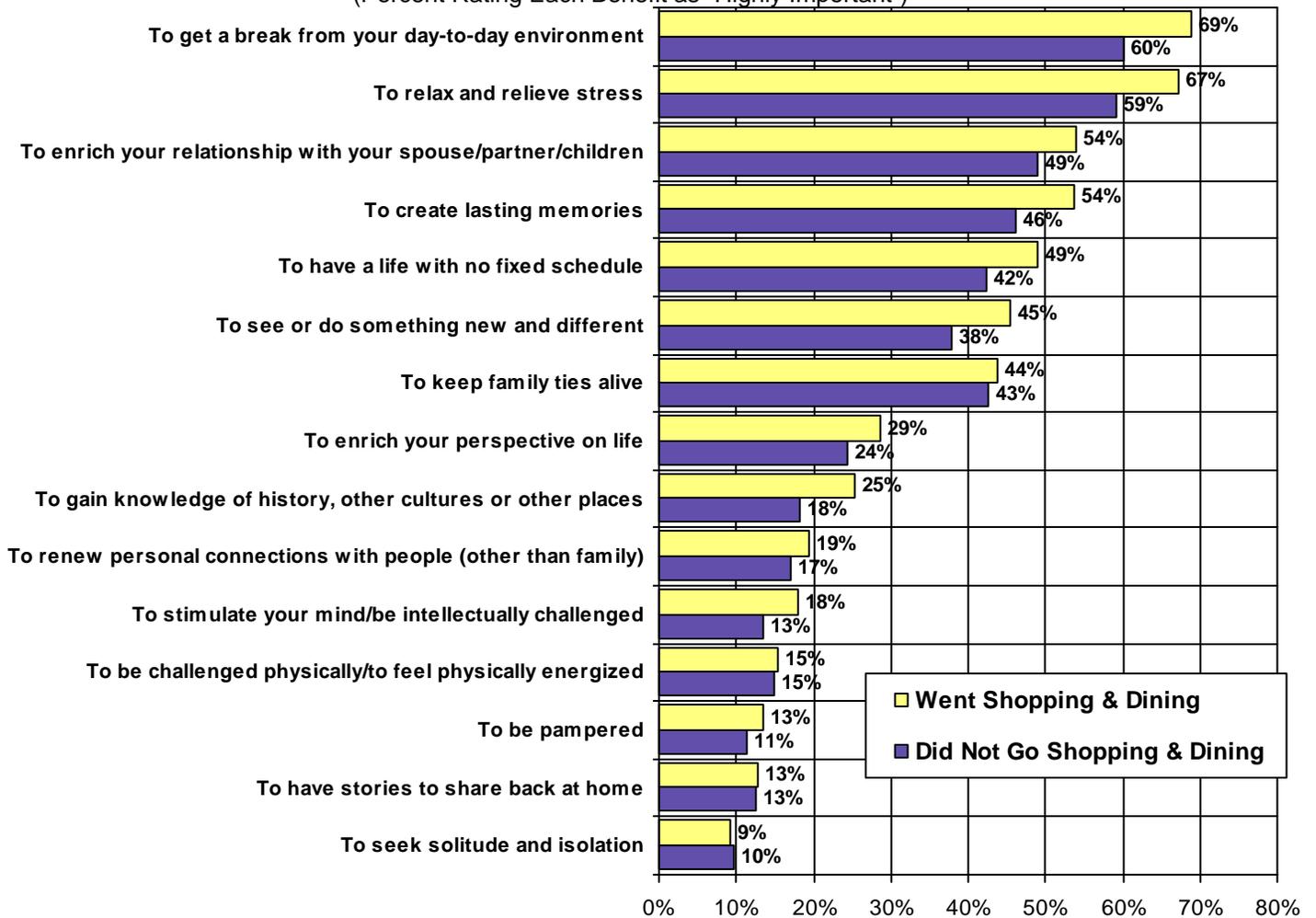
Fig. 11 Tours and Cruises Taken During Past Two Years

	Went Shopping & Dining	Did Not Go Shopping & Dining	Pleasure Travellers	Index
Size of Market	15,281,873	3,157,635	18,439,508	100
A self-guided, sameday tour while on an overnight trip	32.8%	12.5%	29.3%	112
Around the city	26.3%	9.0%	23.4%	113
An organized, sameday guided tour while on an overnight trip	25.1%	8.4%	22.2%	113
Around the countryside - scenic drives	24.8%	10.9%	22.4%	111
A self-guided, overnight tour where you stayed in different locations	20.4%	7.0%	18.1%	113
On the water (sightseeing cruise)	14.9%	4.0%	13.1%	114
Wilderness tour	14.5%	6.0%	13.0%	111
Some other type of tour	11.2%	3.4%	9.8%	114
An organized, overnight, guided tour where you stayed in different locations	11.0%	5.4%	10.1%	110
An organized, overnight guided tour where you stayed in a single location	8.3%	5.6%	7.8%	106
To a casino	7.0%	4.3%	6.5%	107
To a winery	6.4%	2.0%	5.6%	113
Caribbean ocean cruise	5.6%	4.3%	5.4%	104
Ocean cruise – Other	3.6%	2.0%	3.3%	108
To a factory	3.1%	0.6%	2.6%	116
Cruise on another lake or river	2.7%	1.0%	2.4%	112
Cruise on the St. Lawrence River	2.2%	0.8%	1.9%	112
In the air as a pilot or passenger of an airplane or helicopter	2.2%	0.6%	1.9%	114
Some other type of cruise	1.7%	0.9%	1.6%	109
Alaskan ocean cruise	1.7%	1.4%	1.6%	103
Great Lakes cruise	0.8%	0.6%	0.8%	106
Submarine cruise	0.2%	0.0%	0.1%	113

Benefits Sought While On a Vacation

As with the typical Canadian Pleasure Traveller, Shoppers and Diners take vacations to get a break from their day-to-day environment, to relax and relieve stress, to enrich family relationships and to create lasting memories. However, relative to other Canadian Pleasure Travellers, Shoppers and Diners especially value relaxing, unstructured vacations that are intellectually stimulating and that offer novelty and opportunities to learn (e.g., gain knowledge of the history and culture of a destination).

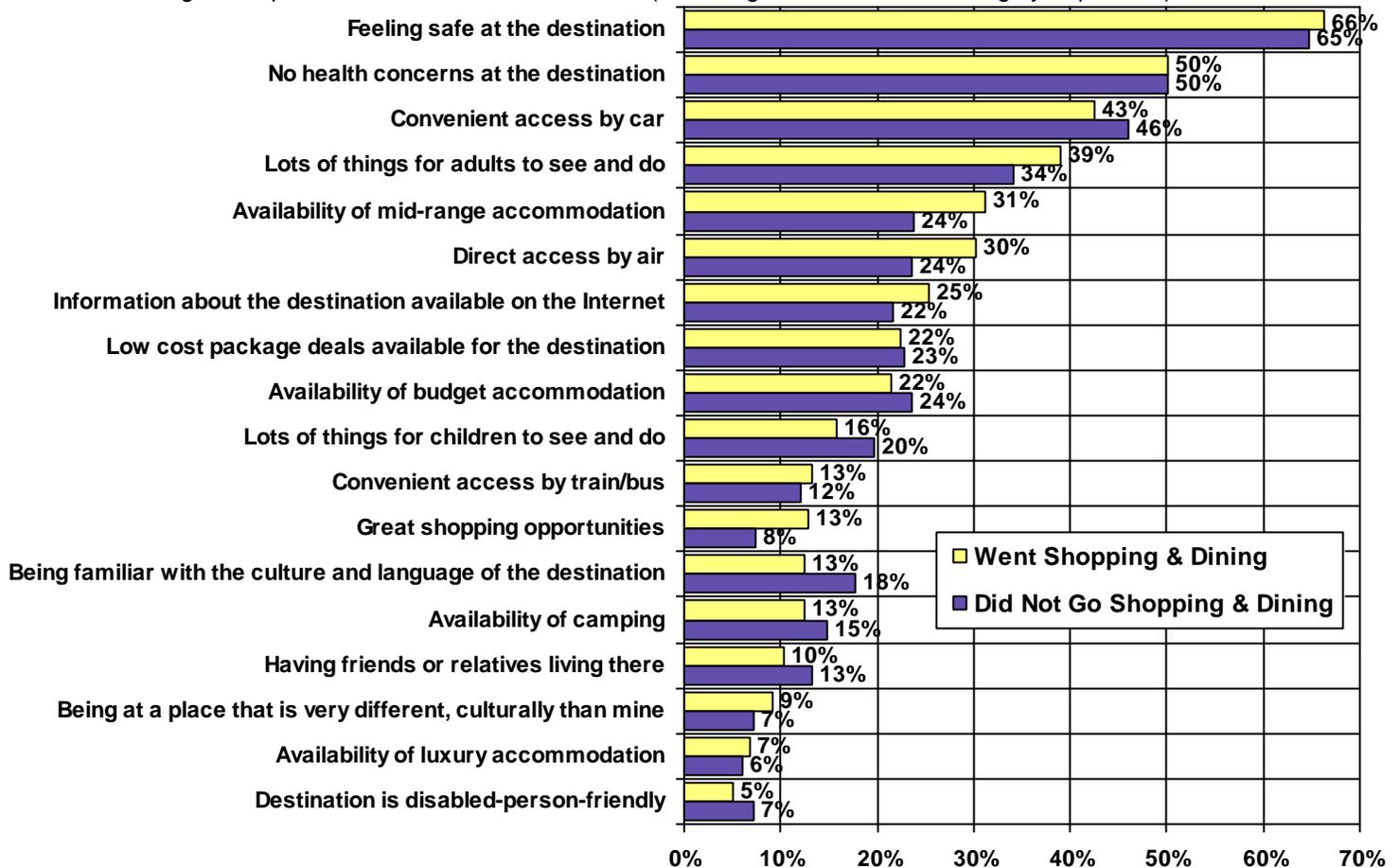
Fig.12 Benefits Sought While On a Vacation
(Percent Rating Each Benefit as “Highly Important”)



Other Attributes of a Destination Considered Important

Similar to other Canadian Pleasure Travellers, the majority of Shoppers and Diners consider it important that they feel safe at a destination and that the destination does not have any health concerns. However, Shoppers and Diners are more likely than others to consider it important that a destination has lots of things for adults to see and do, mid-range priced accommodation, direct access by air and great shopping opportunities. They are less likely to consider it important that a destination has lots to see and do for children, a familiar culture and language and friends or relative living nearby.

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



How Destinations are Selected

Similar to the average Canadian Pleasure Traveller, Shoppers and Diners tend to start planning vacations with a particular destination in mind. They are next most likely to select a trip destination with a certain type of vacation experience in mind. The approaches used by Shopper and Diners to select destinations are similar to those of the typical Canadian Pleasure Traveller.

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

	Went Shopping & Dining	Did Not Go Shopping & Dining	Pleasure Travellers	Index
Size of Market	15,281,873	3,157,635	18,439,508	100
Summer				
Started with a desired destination in mind	49.8%	41.4%	48.5%	103
Started by considering specific activities wanted to do	13.2%	17.0%	13.8%	96
Started with a certain type of vacation experience in mind	24.4%	20.1%	23.7%	103
Looked for packaged deals - no destination in mind	1.4%	0.9%	1.3%	105
Considered something else first	4.2%	4.6%	4.3%	99
Don't know / Other	7.0%	16.0%	8.4%	83
Winter				
Started with a desired destination in mind	49.0%	46.1%	48.6%	101
Started by considering specific activities wanted to do	15.8%	14.0%	15.6%	102
Started with a certain type of vacation experience in mind	19.7%	17.0%	19.3%	102
Looked for packaged deals - no destination in mind	3.3%	2.9%	3.2%	101
Considered something else first	4.4%	6.2%	4.7%	95
Don't know / Other	7.9%	13.7%	8.6%	91

Trip Planning and Information Sources Consulted

The majority of Shoppers and Diners were responsible for planning their trips either on their own (42.1%) or with someone else (16.1%). Most Shoppers and Diners use the Internet, word-of-mouth and past experiences to plan trips. They are slightly more likely than others to obtain travel-related information from television programs and advertising, travel guide books such as Fodor's, electronic newsletters and government tourism bureaus (e.g., official travel guides or brochures, visitor information centres).

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Went Shopping & Dining	Did Not Go Shopping & Dining	Pleasure Travellers	Index
Size of Market		15,281,873	3,157,635	18,439,508	100
Who Plans Trips?	Respondent plans trips	42.1%	41.9%	42.0%	100
	Trip planning a shared responsibility	16.1%	18.1%	16.4%	98
	Someone else plans trips	41.8%	40.0%	41.5%	101
Information Sources Consulted	An Internet website	68.2%	49.2%	65.2%	105
	Advice of others / Word-of-mouth	53.6%	37.6%	51.1%	105
	Past experience / Been there before	52.9%	37.0%	50.4%	105
	A travel agent	36.0%	23.7%	34.1%	106
	Maps	34.3%	22.8%	32.6%	105
	Official travel guides or brochures from state / province	28.2%	13.9%	26.0%	109
	Visitor information centres	25.4%	12.2%	23.4%	109
	Articles in newspapers / magazines	22.5%	11.8%	20.9%	108
	An auto club such as CAA	18.9%	10.7%	17.7%	107
	Advertisements in newspapers / magazines	15.4%	8.1%	14.3%	108
	Travel guide books such as Fodor's	15.1%	5.7%	13.6%	111
	Travel information received in the mail	9.5%	5.3%	8.8%	107
	Programs on television	8.4%	2.5%	7.5%	112
	Advertisements on television	5.4%	2.6%	5.0%	109
	An electronic newsletter or magazine received by e-mail	4.6%	2.0%	4.2%	110
Visits to trade, travel or sports shows	3.3%	2.1%	3.1%	106	

Use of the Internet to Plan and Arrange Trips

Shoppers and Diners are more likely than the average Canadian Pleasure Traveller to use the Internet to book travel. However, they were the second least likely of the 21 culture and entertainment activity types to use the Internet to plan (62.9%) and book (40.3%) travel. Shoppers and Diners most often use hotel or resort websites, official tourism websites of countries, regions or cities, airline sites and travel planning and booking sites such as Expedia. They are most likely to purchase airline tickets and accommodation online.

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

		Went Shopping & Dining	Did Not Go Shopping & Dining	Pleasure Travellers	Index
	Size of Market	15,281,873	3,157,635	18,439,508	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	37.1%	59.1%	40.8%	91
	Uses Internet to plan trips only	22.6%	19.6%	22.1%	102
	Uses Internet to book part of trip	40.3%	21.4%	37.0%	109
Types of Websites Consulted	A website of a hotel or resort	58.9%	42.3%	57.0%	103
	A tourism website of a country / region / city	51.4%	37.8%	49.8%	103
	An airline website	48.5%	30.1%	46.3%	105
	A travel planning / booking website	47.0%	35.4%	45.7%	103
	A website of an attraction	36.1%	22.1%	34.5%	105
	Some other website	27.3%	30.0%	27.6%	99
	A cruise line website	8.1%	7.6%	8.1%	101
	A motorcoach website	2.6%	1.6%	2.5%	105
Parts of Trips Booked Over The Internet	Air tickets	70.7%	58.6%	69.5%	102
	Accommodation	70.2%	59.5%	69.2%	102
	Car rental	28.0%	19.4%	27.1%	103
	Tickets or fees for specific activities or attractions	24.3%	17.4%	23.6%	103
	Tickets for rail, bus or boat / ship fares	15.8%	10.6%	15.3%	103
	A package containing two or more items	15.6%	13.4%	15.4%	101
	Other	4.0%	3.0%	3.9%	103

Media Consumption Habits

Shoppers and Diners are slightly more likely than the average Canadian Pleasure Traveller to consume travel-related. However, the use of travel media by this segment is well below that of the other 21 culture and entertainment activity types. Shoppers and Diners can be more effectively targeted through media related to shopping (e.g., shopping channels on television, shopping websites), fashion and beauty magazines and soft rock or adult contemporary music radio stations.

Fig. 17 Media Consumption Habits

		Went Shopping & Dining	Did Not Go Shopping & Dining	Pleasure Travellers	Index
	Size of Market	15,281,873	3,157,635	18,439,508	100
Newspaper Readership	Reads daily newspaper	88.0%	83.8%	87.3%	101
	Reads weekend edition of newspaper	88.0%	83.8%	87.3%	101
	Reads local neighbourhood or community newspapers	62.4%	57.3%	61.5%	101
	Reads other types of newspapers	17.8%	14.3%	17.2%	103
	Frequently or occasionally reads travel section of daily newspaper	47.4%	37.4%	45.7%	104
	Frequently or occasionally reads travel section of weekend newspaper	49.4%	37.2%	47.3%	104
Types of Magazines Read (Top 5 Indexed)	Fashion and beauty	25.6%	14.5%	23.7%	108
	Travel (e.g., Condé Nast)	12.6%	7.6%	11.8%	107
	Magazines about your city	12.8%	8.1%	12.0%	107
	Entertainment and music	34.4%	22.7%	32.4%	106
	General interest	32.9%	22.7%	31.2%	106
Type of Television Programs Watched (Top 5 Indexed)	Shopping channels	5.0%	2.7%	4.6%	108
	Dramas (e.g., Law & Order)	59.3%	47.6%	57.3%	103
	Travel shows	31.3%	25.5%	30.3%	103
	Reality shows (e.g., Canadian Idol)	41.0%	33.7%	39.8%	103
	Situation comedies (e.g., Friends)	52.8%	43.8%	51.3%	103
Type of Radio Programs Listened To (Top 5 Indexed)	Soft music / Adult contemporary	27.2%	18.5%	25.7%	106
	Jazz / Big band	9.2%	6.7%	8.8%	105
	Top 40 / Current hits	26.2%	20.3%	25.2%	104
	News / Talk / Information	40.7%	33.1%	39.4%	103
	Multicultural	8.6%	7.0%	8.4%	103
Types of Websites Visited (Top 5 Indexed)	Shopping (all types)	35.3%	23.0%	33.5%	106
	Travel	53.0%	36.5%	50.6%	105
	Health	44.6%	37.3%	43.5%	103
	Network news sites (e.g., CBC, CNN)	37.0%	31.2%	36.1%	102
	House and home	28.8%	24.6%	28.1%	102

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

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

Appendix Two: Canadian TAMS 2006 Outdoor Activity Segmentation

Appendix Two: Canadian TAMS 2006 Outdoor Activity Segmentation		
Activity Segment	Activities in Segment	
Golfing	Played During a Stay at a Golf Resort with Overnight Stay	Golf Tour Package to Play on Various Courses
	Played an Occasional Game While on a Trip	
Hunting	Hunting for Small Game	Hunting for Birds
	Hunting for Big Game	
Fishing	Fresh-Water Fishing	Salt-Water Fishing
	Ice Fishing	Trophy Fishing
Wildlife Viewing	Viewing Land Based Animals	Bird Watching
	Whale Watching & Other Marine Life	Visited National, Provincial /State Park
	Wildflowers /Flora Viewing	Viewing Northern Lights
Hiking, Climbing & Paddling	Mountain Climbing /Trekking	Fresh Water Kayaking /Canoeing
	Rock Climbing	Ocean Kayaking / Canoeing
	Hiking /Backpacking in Wilderness Setting With Overnight Camping or Lodging	Same Day Hiking Excursion While on a Trip of 1+ Nights
		White Water Rafting
Boating & Swimming	Motorboating	Swimming in Lakes
	Water Skiing	
Ocean Activities	Swimming in Oceans	Snorkeling in Sea /Ocean
	Sunbathing, Sitting on a Beach	Scuba Diving in Sea/Ocean
Sailing & Surfing	Sailing	Parasailing
	Wind Surfing	Kite Surfing
Freshwater Scuba & Snorkeling	Scuba Diving in Lakes /Rivers	Snorkeling in Lakes /Rivers
Exercising & Jogging	Working Out in Fitness Centre	Jogging or Exercising Outdoors
Cycling	Overnight Touring Trip	Recreational - Same Day Excursion
	Mountain Biking	
Motorcycling	Overnight Touring Trip	Same Day Excursion
Horseback Riding	With an Overnight Stop	Same Day Excursion
Snowmobiling & ATVing	All Terrain Vehicle - Overnight Touring Trip	Snowmobiling As an Overnight Touring Trip
	All Terrain Vehicle - Same Day Excursion	Snowmobiling Day Use on Organized Trail
Downhill Skiing & Snowboarding	Snowboarding	Downhill Skiing
Cross-country Skiing & Snowshoeing	Cross-country Skiing	Cross-country or Back Country as an Overnight Touring Trip
	Snowshoeing	
Wilderness Activities	Wilderness Skills Courses	Dog Sledding
	Ice Climbing	
Skating	Ice Skating	In-Line /Rollerblading
Extreme Air Sports	Parachuting	Hot Air Ballooning
	Hang Gliding	
Team Sports	Ice Hockey	Curling
	Football	Basketball
	Baseball or Softball	Soccer
Sports & Games	Board Games	Badminton
	Volleyball	Tennis
	Beach Volleyball	Mini-Golf
	Bowling	