

U.S. TRAVEL MARKET

**Shopping & Dining While on Trips
Of One or More Nights**

A Profile Report

July 4, 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



Executive Summary

Over the last two years, the majority of adult Americans (60.4%, or 132,497,116) went shopping and dining while on an out-of-town, overnight trip of one or more nights. 44.7% dined in restaurants offering local ingredients and recipes while 21.6% dined in local outdoor cafés. Travelers most often shopped for clothing, shoes and jewelry (38.1%), followed by books and music (26.6%), local arts & crafts (25.7%), antiques (18.0%), gourmet foods (12.1%), and at greenhouses or garden centres (8.3%). Only 14.4% of Shoppers and Diners (19,088,945 adult Americans) reported that shopping and/or dining were the main reasons for taking at least one trip in the past two years.

Shoppers and Diners are slightly more likely to be female (52.8%) than male. Beyond that, their demographic profile is similar to that of the average U.S. Pleasure Traveler. Their level of education (61.4% university graduate) and household incomes (\$77,517) are only slightly above-average. They are over-represented in Alaska and the South Atlantic, Middle Atlantic and New England regions and are more likely to live in large cities with populations of 2 million or more.

Over the past two years, Shoppers and Diners were slightly more likely to have taken a trip to Canada than the average U.S. Pleasure Traveler (16.0% versus 14.6%). The most common Canadian destinations were Ontario, British Columbia and Quebec.

Shoppers and Diners were slightly more likely than the average U.S. Pleasure Traveler to have pursued most culture and entertainment activities while on trips during the past two years. The majority visited historical sites, museums and art galleries, theme parks and exhibits, and casinos, theatre and comedy clubs. Other food-related activities (e.g., fine dining & spas, wine, beer & food tastings) were also popular among Shoppers and Diners. The most popular outdoor activities for Shoppers and Diners were ocean activities and wildlife viewing. Besides looking for shopping opportunities, Shoppers and Diners are more likely than the average U.S. Pleasure Traveler to look for destinations that have mid-range priced accommodation, direct access by air and lots of things for adults to see and do.

Most Shoppers and Diners use the Internet for planning (73.7%) and booking trips (53.3%) The majority visit travel-related websites and read the travel section of weekend newspapers. They are slightly more likely than average to watch travel-related television shows and to read travel magazines. Shoppers and Diners also are more likely to watch television shopping channels and visit shopping websites.

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, travel behaviour of one or more nights over the past two years and provides detailed information on Travelers' 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 went shopping and dining while on a trip, and compares them with other U.S. Pleasure Travelers (i.e., took at least one pleasure trip in the last two years). This report is part of a series of 43 Activity Reports prepared using the U.S. TAMS database.

Shopping & Dining While on Trips

Market Incidence

Over the last two years, 60.4% (132,497,116) of adult Americans went shopping and dining while on an out-of-town, overnight trip of one or more nights. 44.7% dined in restaurants offering local ingredients and recipes, and 21.6% dined in local outdoor cafés. Travelers most often shopped for clothing, shoes and jewellery, (38.1%), followed by books and music (26.6%), local arts and crafts (25.7%), antiques (18.0%), gourmet foods (12.1%), and at greenhouses or garden centres (8.3%). 1.5% (3,261,335 adult Americans) participated in all eight shopping and dining activities while on trips. 14.4% (19,088,945 adult Americans) reported that shopping and/or dining were the main reasons for taking at least one trip in the past two years.

Fig. 1 Incidence of Shopping & Dining While on Trips¹

Size of Market	Number of Shoppers and Diners ²	Percent Main Reason for Trip ³	Percent of Pleasure Travelers ⁴	Percent of Total U.S. Population ⁵
Shopping & Dining (All Activities)	132,497,116	14.4%	77.7%	60.4%
Dining in restaurants offering local ingredients & recipes	98,157,579	10.3%	57.6%	44.7%
Shopping / Browsing for clothing, shoes & jewelry	84,007,747	10.8%	49.3%	38.1%
Shopping / Browsing in book or music stores	58,424,911	8.4%	34.3%	26.6%
Shopping / Browsing in local arts & crafts studios / exhibitions	56,794,958	9.2%	33.3%	25.7%
Dining in local outdoor cafes	47,700,325	7.6%	28.0%	21.6%
Shopping / Browsing for antiques	39,754,839	11.9%	23.3%	18.0%
Shopping / Browsing for gourmet foods in retail stores	26,803,891	9.0%	15.7%	12.1%
Shopping / Browsing in greenhouse or garden centre	18,320,565	12.4%	10.7%	8.3%
Participated in all eight activities	3,261,335	10.2%	1.9%	1.5%

- 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, overnight 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 Travelers" 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 Travelers who participated in each activity on at least one trip during the last two years.
- 5 - This column reports the percent of the Total U.S. Adult Market who participated in each activity on a trip during the past two years.

Incidence by Region, State and Population Size

Relative to the average U.S. Pleasure Traveler, Shoppers and Diners tend to be over-represented among those living in Alaska and the South Atlantic, Middle Atlantic and New England regions of the United States. They are more likely to live in large cities (population 2 million or more) than in smaller cities, towns and rural areas.

Fig. 2 Geographic Distribution & Population Size of Those Who Shopped & Dined While on Trips

	Total Population	Estimated Number Who Shopped & Dined on a Trip	Percent of Pleasure Travelers in Region Who Shopped & Dined on a Trip	Percent of Total Regional Population Who Shopped & Dined on a Trip
United States	222,846,268	132,497,116	77.7%	60.4%
New England	11,095,629	6,718,737	78.5%	61.1%
Middle Atlantic	31,005,526	18,179,971	78.9%	59.4%
East North Central	34,621,254	20,527,161	77.1%	60.2%
West North Central	15,024,360	9,284,352	77.1%	62.9%
South Atlantic	42,602,998	25,312,277	78.9%	60.3%
East South Central	13,597,436	7,440,142	77.9%	56.1%
West South Central	24,853,901	13,783,835	76.1%	57.1%
Mountain	15,030,720	9,244,854	76.3%	62.3%
Pacific	34,529,689	21,639,551	77.5%	63.3%
Alaska	484,754	366,236	86.7%	77.1%
Not Available	745,757	519,516	83.7%	70.7%
Less than 100,000	29,429,442	15,629,417	75.3%	54.4%
100,000 to 499,999	36,551,501	20,878,682	76.9%	58.2%
500,000 to 1,999,999	52,335,815	30,883,767	77.6%	59.9%
2,000,000 or more	103,783,753	64,585,734	78.6%	63.1%

Shoppers and Diners are most likely to live in Alaska, Delaware, Rhode Island, South Carolina, New Mexico, Wyoming and Massachusetts. They are least likely to live in Idaho, Maine, New Hampshire, Oklahoma, Utah and Alabama (see Fig. 3 on next page).

Demographic Profile

Shoppers and Diners are slightly more likely to be female (52.8%) than male (47.2%). They are well-represented among all age groups and, similar to the average U.S. Pleasure Traveler, they are typically married without dependent children under 18 years of age living at home. Shoppers and Diners are slightly more likely than the average U.S. Pleasure Traveler to have a university education (61.4%) and their household incomes (\$77,517) are slightly above the average.

Fig. 4 Demographic Profile of Those Who Shopped & Dined on a Trip
Relative to All U.S. Pleasure Travelers

Attribute	Size of Market	Shoppers and Diners	Non-Shoppers and Diners ¹	Pleasure Travelers	Index ²
		132,497,116	38,013,125	170,510,241	100
Gender	Male	47.2%	53.3%	48.5%	97
	Female	52.8%	46.7%	51.5%	103
Age of Respondent	18 to 24	10.5%	12.0%	10.8%	97
	25 to 34	21.3%	19.9%	21.0%	101
	35 to 44	16.9%	18.6%	17.3%	98
	45 to 54	21.3%	20.2%	21.0%	101
	55 to 64	15.9%	13.9%	15.5%	103
	65 Plus	14.1%	15.4%	14.4%	98
Average Age		45.5	45.4	45.4	N/A
Marital Status	Not married	29.5%	34.1%	30.5%	97
	Married	70.5%	65.9%	69.5%	101
Parental Status	No children under 18	70.8%	67.3%	70.0%	101
	Children under 18	29.2%	32.7%	30.0%	97
Education	High school or less	18.0%	29.1%	20.5%	88
	Trade, Technical, Community Col.	20.6%	24.0%	21.4%	96
	University Degree	42.5%	36.2%	41.1%	103
	Post Graduate Degree	18.9%	10.7%	17.1%	111
Household Income	Under \$20,000	7.1%	11.7%	8.1%	87
	\$20,000 to \$39,999	15.0%	20.4%	16.2%	93
	\$40,000 to \$59,999	16.4%	17.6%	16.7%	98
	\$60,000 to \$79,999	14.8%	14.2%	14.7%	101
	\$80,000 to \$99,999	12.2%	9.5%	11.6%	105
	\$100,000 to \$149,999	15.4%	10.8%	14.4%	107
	\$150,000 or more	7.5%	3.9%	6.7%	112
Not stated	11.6%	12.0%	11.7%	99	
Average Household Income		\$77,517	\$63,055	\$74,303	N/A

1 - "Non-Shoppers and Diners" are 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 numbers of Shoppers and Diners and Non-Shoppers and Diners equal the number of Pleasure Travelers.

2 - The "Index" is calculated by dividing the percent for Shoppers and Diners in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which Shoppers and Diners are over or under-represented relative to the average Pleasure Traveler. An index of 100 means the percent participating in the activity is the same as that of the average U.S. Pleasure Traveler. Index values over 100 indicate that those participating in the activity are over-represented relative to the average U.S. Pleasure Traveler. Index values less than 100 indicate that those participating in the activity are under-represented relative to the average U.S. Pleasure Traveler.

Travel Activity (During Last Two Years)

Relative to the average U.S. Pleasure Traveler, Shoppers and Diners were slightly more likely to have visited Mexico, the Caribbean and overseas destinations.

Shoppers and Diners were also slightly more likely than average to have taken a trip to Canada in the past two years (16.0% versus 14.6%). The most common destinations in Canada were Ontario (9.1%), British Columbia (4.7%) and Quebec (3.5%). Relative to the average U.S. Pleasure Traveler, Shoppers and Diners were somewhat more likely to have taken a trip to Newfoundland and Labrador and Prince Edward Island than to other provinces and territories within Canada.

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

	Shoppers and Diners	Non-Shoppers and Diners	Pleasure Travelers	Index
Size of Market	132,497,116	38,013,125	170,510,241	100
All destinations	87.1%	79.5%	85.4%	102
Canada	16.0%	9.5%	14.6%	110
Newfoundland and Labrador	0.5%	0.1%	0.4%	123
Prince Edward Island	0.7%	0.2%	0.6%	120
New Brunswick	0.9%	0.5%	0.8%	111
Nova Scotia	1.5%	0.7%	1.3%	113
Quebec	3.5%	1.8%	3.1%	112
Ontario	9.1%	5.5%	8.3%	110
Manitoba	0.6%	0.4%	0.5%	109
Saskatchewan	0.5%	0.3%	0.5%	109
Alberta	1.4%	0.6%	1.2%	114
British Columbia	4.7%	2.0%	4.1%	115
Yukon	0.7%	0.2%	0.6%	117
Northwest Territories	0.4%	0.2%	0.4%	111
Nunavut	0.1%	LT 0.1%	LT 0.1%	109
Own State	81.2%	74.5%	79.7%	102
Other parts of the U.S.	92.9%	82.7%	90.6%	102
Mexico	15.3%	7.6%	13.6%	113
Caribbean	14.4%	6.9%	12.7%	113
All other destinations	10.8%	5.3%	9.6%	113

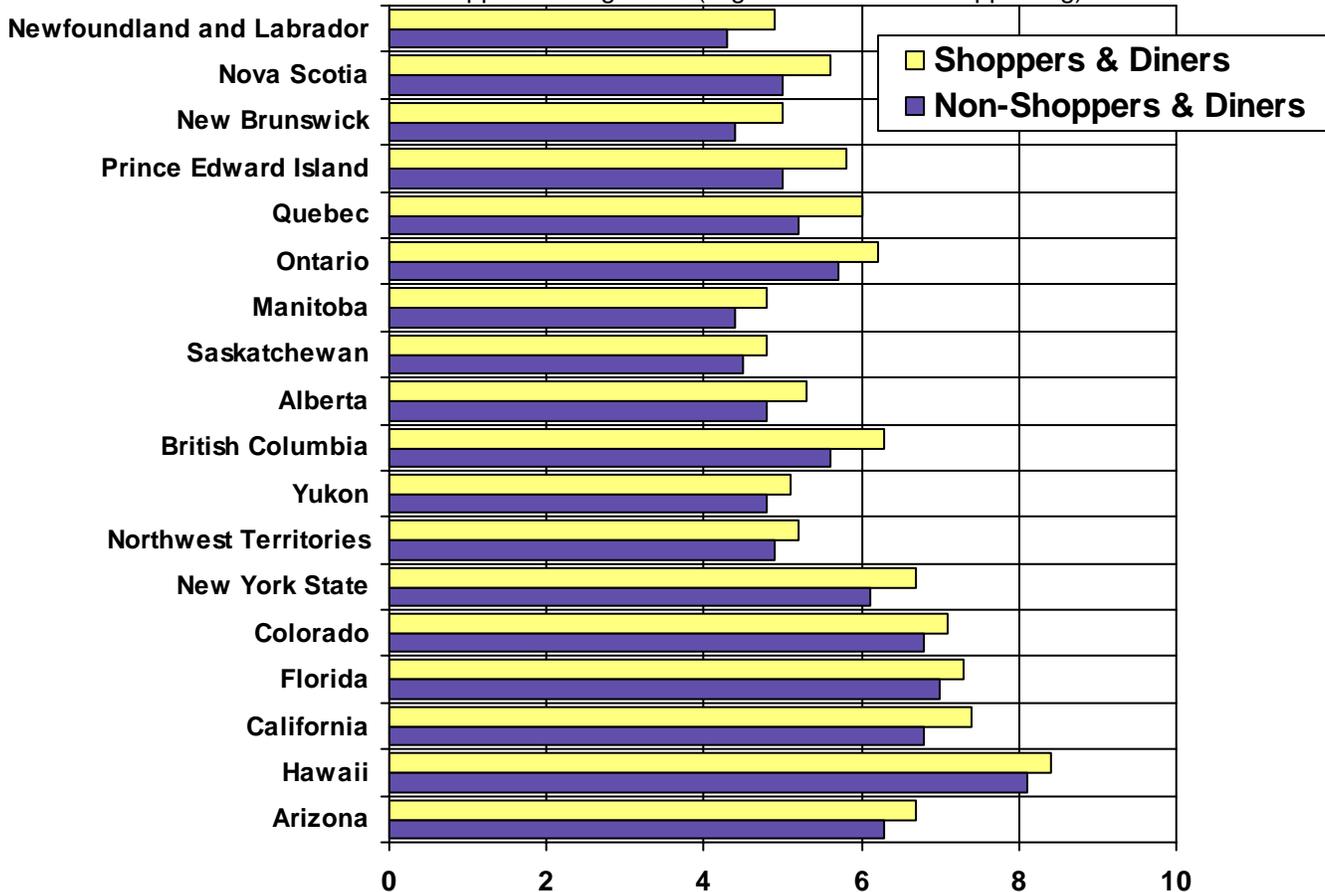
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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 gave higher ratings than other U.S. Pleasure Travelers to all Canadian destinations. British Columbia (6.3) received the highest rating, followed by Ontario (6.2) and Quebec (6.0).

U.S. Pleasure Travelers, in general, rated the six U.S. reference states as more appealing than the Canadian provinces or territories. Hawaii (8.4) received the highest rating among all destinations from Shoppers and Diners.

Fig. 6 Overall Rating of Appeal 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

Relative to the average U.S. Pleasure Traveler, Shoppers and Diners were slightly more likely to participate in culture and entertainment activities while on trips in the past two years. The majority of Shoppers and Diners visited historical sites, museums and art galleries, theme parks and exhibits, and casinos, theatre and comedy clubs while on trips. Relative to the average U.S. Pleasure Traveler, Shoppers and Diners were somewhat more likely to have visited cultural exhibits which offer opportunities to learn something new (e.g., archaeological digs, aboriginal cultural experiences, garden theme attractions) as well as food-related attractions (e.g., fine dining & spas, wine, beer & food tastings).

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

	Shoppers and Diners	Non-Shoppers and Diners	Pleasure Travelers	Index
Size of Market	132,497,116	38,013,125	170,510,241	100
Historical Sites, Museums & Art Galleries	62.1%	23.2%	53.5%	116
Theme Parks & Exhibits	53.7%	32.5%	49.0%	110
Casino, Theatre & Comedy Clubs	50.7%	27.1%	45.4%	112
Fairs & Festivals	47.7%	17.6%	41.0%	116
Fine Dining & Spas	39.8%	9.2%	33.0%	121
Science & Technology Exhibits	29.1%	9.8%	24.8%	117
Wine, Beer & Food Tastings	28.0%	5.2%	22.9%	122
Professional Sporting Events	18.5%	7.7%	16.1%	115
Rock Concerts & Recreational Dancing	17.7%	6.6%	15.3%	116
Equestrian & Western Events	17.3%	9.1%	15.5%	112
Garden Theme Attractions	16.6%	3.5%	13.7%	121
Agro-Tourism	16.2%	4.2%	13.5%	120
High Art Performances	13.2%	3.1%	10.9%	121
Aboriginal Cultural Experiences	10.4%	2.3%	8.6%	121
Theatre, Film & Musical Festivals	9.9%	2.9%	8.3%	119
Amateur Tournaments	8.9%	3.3%	7.7%	116
Archaeological Digs & Sites	6.7%	1.3%	5.5%	122
Participatory Historical Activities	4.8%	0.9%	3.9%	122
National & International Sporting Events	2.2%	0.7%	1.9%	117

Culture and Entertainment Activities Pursued While Not on Trips

Most of those who went shopping and dining on trips also dine in restaurants and visited fairs and festivals while NOT traveling. Relative to the average U.S. Pleasure Traveler they are slightly more likely to attend live theatre, the ballet, the opera and jazz clubs. They are also slightly more likely to visit cultural attractions such as museums, art galleries and art shows and botanical gardens.

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

	Shoppers and Diners	Non-Shoppers and Diners	Pleasure Travelers	Index
Size of Market	132,497,116	38,013,125	170,510,241	100
Going out to eat in restaurants	94.5%	86.9%	92.8%	102
Going to festivals or fairs	68.9%	53.5%	65.5%	105
Going to zoos or aquariums	47.9%	37.8%	45.6%	105
Going to historic sites or heritage buildings	43.5%	28.3%	40.1%	108
Going to amateur sporting events	41.8%	33.2%	39.9%	105
Going to museums	41.4%	24.0%	37.5%	110
Going to amusement or theme parks	39.1%	34.8%	38.1%	103
Going to professional sporting events	36.6%	29.0%	34.9%	105
Going to pick-your-own farms or farmers' market	33.2%	26.0%	31.6%	105
Going to live theatre	32.4%	17.9%	29.2%	111
Going to art galleries or art shows	31.7%	14.0%	27.8%	114
Going to gamble in casinos	28.6%	25.8%	28.0%	102
Going to bars with live pop or rock bands	25.2%	17.9%	23.6%	107
Going to rock music concerts	22.6%	16.6%	21.3%	106
Going dancing	22.5%	15.2%	20.8%	108
Going to botanical gardens	22.2%	12.2%	20.0%	111
Going to classical music concerts	16.6%	8.9%	14.9%	112
Going to day spas	11.6%	5.7%	10.3%	113
Staying overnight in a hotel or B&B in own city	11.2%	8.3%	10.6%	106
Going to jazz clubs	8.9%	4.6%	7.9%	112
Going to rodeos	8.4%	7.5%	8.2%	102
Going to the ballet	8.0%	3.6%	7.0%	114
Going to the opera	6.4%	3.3%	5.7%	112

Outdoor Activities Pursued While on Trips

Shopper and Diners were most likely to participate in ocean activities (e.g., swimming) and wildlife viewing while on trips in the past two years. They were also more likely than the average U.S. Pleasure Traveler to go hiking, climbing and paddling, to exercise and jog, and to play games and individual sports (e.g. tennis) while on trips in the last two years.

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

	Shoppers and Diners	Non-Shoppers and Diners	Pleasure Travelers	Index
Size of Market	132,497,116	38,013,125	170,510,241	100
Ocean Activities (e.g., swimming in ocean, ocean kayaking)	45.0%	20.8%	39.6%	114
Wildlife Viewing	40.4%	15.7%	34.9%	116
Hiking, Climbing & Paddling	26.7%	12.1%	23.5%	114
Games & Individual Sports (e.g., tennis, board games)	26.0%	9.0%	22.2%	117
Boating & Swimming (e.g., motorboating, swimming in lakes)	23.4%	12.7%	21.0%	111
Fishing	19.3%	15.1%	18.4%	105
Exercising & Jogging	17.0%	4.0%	14.1%	121
Golfing	12.1%	5.7%	10.7%	113
Downhill Skiing & Snowboarding	8.8%	5.4%	8.0%	109
Team Sports (e.g., football, baseball, basketball)	8.6%	5.3%	7.9%	109
Snowmobiling & ATVing	7.6%	5.6%	7.1%	106
Cycling	7.4%	2.7%	6.3%	116
Horseback Riding	7.2%	2.6%	6.2%	117
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	5.6%	2.0%	4.8%	117
Hunting	5.2%	6.1%	5.4%	96
Board & Blade (e.g., skateboarding, ice-skating)	4.7%	1.8%	4.0%	116
Scuba & Snorkelling	4.7%	2.0%	4.1%	114
Motorcycling	3.2%	2.5%	3.1%	105
Cross-country Skiing & Snowshoeing	2.2%	0.8%	1.9%	117
Extreme Air Sports (e.g., parachuting, bungee jumping)	2.0%	0.7%	1.7%	117
Extreme Skiing (e.g., heli-skiing, overnight x-country trips)	0.4%	0.2%	0.3%	114

Outdoor Activities Pursued While Not on Trips

The majority of Shoppers and Diners went on day outings to a park, exercised at home or at a fitness club, went swimming and gardened at home when not traveling. Their participation rate in most outdoor activities is similar to that of the average U.S. Pleasure Traveler. One exception to this pattern is that Shoppers and Diners were somewhat more likely to have gone cross-country skiing in the past two years while not traveling. On the other hand, Shoppers and Diners are less likely than the average U.S. Pleasure Traveler to have gone hunting.

Fig. 10 Outdoor Activities Pursued While NOT on Trips

	Shoppers and Diners	Non-Shoppers and Diners	Pleasure Travelers	Index
Size of Market	132,497,116	38,013,125	170,510,241	100
Day outing to a park	65.5%	54.6%	63.1%	104
Exercising at home or at a fitness club	59.1%	45.6%	56.0%	105
Swimming	58.9%	48.4%	56.5%	104
Gardening	55.1%	46.2%	53.1%	104
Picnicking	49.8%	40.5%	47.7%	104
Hiking	34.9%	24.2%	32.5%	107
Fishing	32.1%	34.9%	32.8%	98
Camping	26.4%	27.7%	26.7%	99
Cycling	24.0%	19.1%	22.9%	105
Sailing or other boating	20.8%	16.9%	20.0%	104
Jogging	20.8%	15.0%	19.5%	107
Golfing	19.2%	15.0%	18.3%	105
Playing team sports	16.3%	14.1%	15.8%	103
Playing racquet sports (e.g., tennis or badminton)	14.2%	9.7%	13.2%	108
Riding an all-terrain vehicle (ATV)	11.1%	12.7%	11.5%	97
Hunting	11.0%	14.5%	11.8%	93
Horseback riding	9.0%	7.1%	8.6%	105
Canoeing or kayaking	8.3%	6.2%	7.8%	106
Rollerblading	7.7%	6.0%	7.3%	105
Downhill skiing	6.0%	4.7%	5.7%	105
Ice-skating	5.8%	4.5%	5.5%	105
Snowmobiling	3.3%	3.4%	3.3%	99
Snowboarding	2.8%	2.2%	2.7%	105
Cross-country skiing	2.8%	1.6%	2.5%	111
Skateboarding	2.2%	2.1%	2.2%	101

Accommodations Stayed In While on Trips

The types of accommodation used by Shoppers and Diners when on trips in the past two years were similar to those used by the average U.S. Pleasure Traveler. The most popular types of accommodation among Shoppers and Diners included seaside resorts, followed by public campgrounds, and lakeside or riverside resorts.

Fig. 11 Accommodations Stayed In While on Trips

	Shoppers and Diners	Non-Shoppers and Diners	Pleasure Travelers	Index
Size of Market	132,497,116	38,013,125	170,510,241	100
Seaside Resort	41.0%	17.8%	37.7%	109
A Public Campground in a National, State, Provincial or Municipal Park	34.2%	38.8%	34.8%	98
Lakeside/Riverside Resort	27.3%	15.4%	25.6%	107
A Private Campground	20.1%	26.3%	20.9%	96
Ski Resort or Mountain Resort	19.5%	12.2%	18.4%	106
A Camp Site in a Wilderness Setting (Not a Campground)	9.4%	11.3%	9.6%	97
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	8.8%	8.5%	8.7%	100
Wilderness Lodge You Can Drive to by Car	7.5%	4.9%	7.2%	105
Health Spa	7.1%	2.2%	6.5%	111
Country Inn or Resort with Gourmet Restaurant	4.5%	1.4%	4.1%	111
Farm or Guest Ranch	4.2%	3.3%	4.1%	103
On a Houseboat	3.2%	1.6%	2.9%	107
Remote or Fly-In Wilderness Lodge	1.8%	1.1%	1.7%	106
Cooking School	1.4%	0.1%	1.2%	115
Remote or Fly-In Wilderness Outpost	1.0%	0.5%	0.9%	107
Wine Tasting School	1.0%	0.4%	0.9%	109

Tours and Cruises Taken During Past Two Years

Shoppers & Diners were somewhat more likely to take tours and cruises in the last two years than the average U.S. Pleasure Traveler. They were most likely to take a self-guided sameday tour or an organized, guided sameday tour, however, city tours and scenic countryside drives were also popular for those in this segment. The most popular types of cruises among Shoppers and Diners were Caribbean ocean cruises and sightseeing cruises.

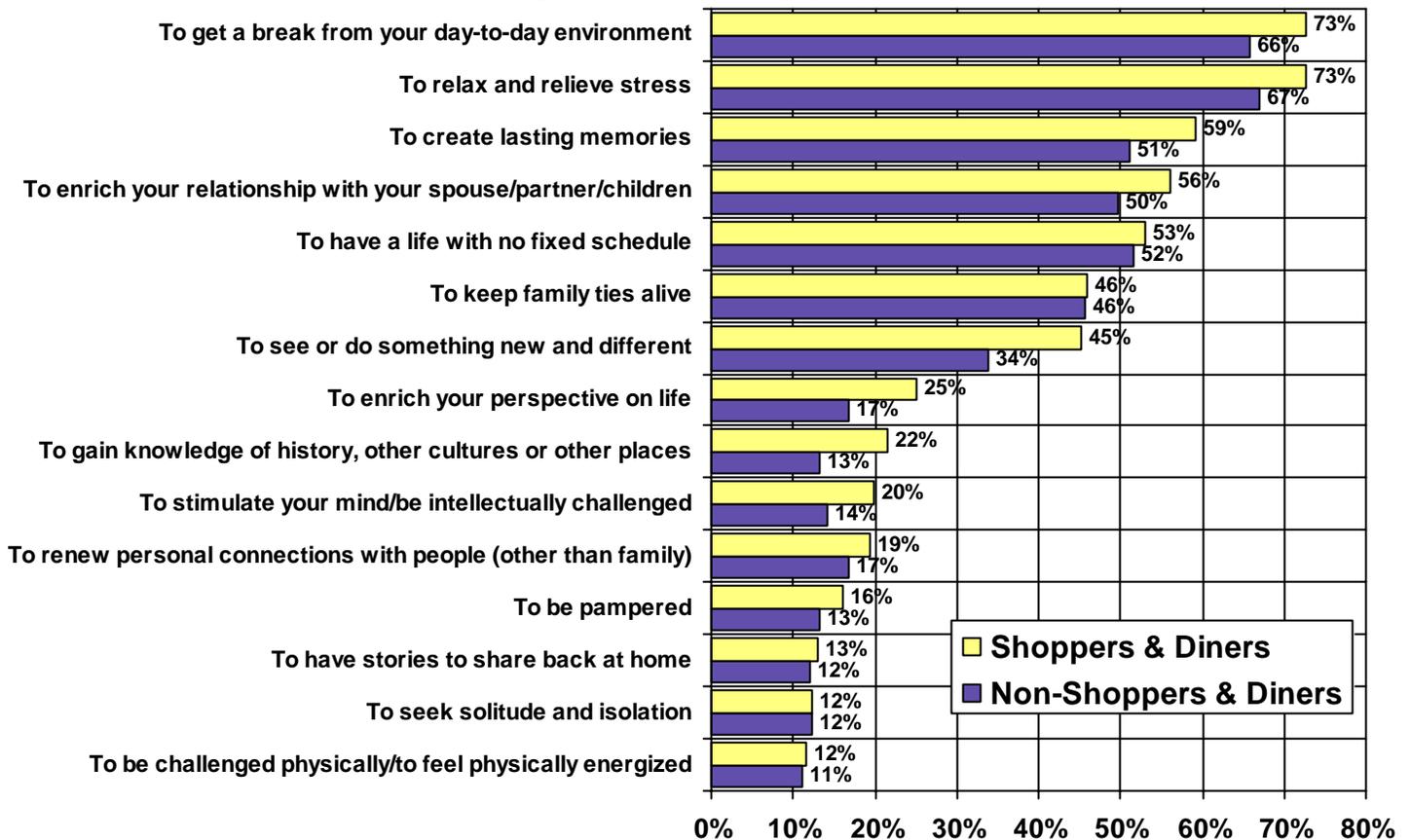
Fig. 12 Tours and Cruises Taken During Past Two Years

	Shoppers and Diners	Non-Shoppers and Diners	Pleasure Travelers	Index
Size of Market	132,497,116	38,013,125	170,510,241	100
A self-guided sameday tour while on an overnight trip	22.5%	7.9%	19.2%	117
An organized sameday guided tour while on an overnight trip	21.4%	8.4%	18.5%	116
Around the city	18.7%	5.5%	15.8%	119
Around the country side - scenic drives	15.7%	4.0%	13.1%	120
A self-guided overnight tour where you stayed in different locations	12.1%	4.3%	10.4%	117
Some other type of tour	10.3%	3.9%	8.8%	116
Caribbean ocean cruise	10.1%	5.2%	9.0%	112
On the water (sightseeing cruise)	9.3%	2.5%	7.8%	120
An organized overnight guided tour where you stayed in different locations	9.1%	3.5%	7.9%	116
Wilderness tour	8.8%	2.6%	7.4%	119
An organized overnight guided tour where you stayed in a single location	7.6%	3.8%	6.7%	113
To a casino	5.7%	2.1%	4.9%	116
Ocean cruise - Other	5.4%	2.7%	4.8%	113
To a winery	4.4%	0.7%	3.6%	123
Alaskan ocean cruise	2.8%	1.4%	2.5%	113
Cruise on another lake or river	2.3%	0.8%	2.0%	118
To a factory	2.2%	0.5%	1.8%	120
Some other type of cruise	1.9%	0.9%	1.7%	113
In the air as a pilot or passenger of an airplane or helicopter	1.7%	0.5%	1.4%	119
Great Lakes cruise	0.5%	0.2%	0.4%	117
Cruise on the St. Lawrence River	0.3%	0.2%	0.3%	112
Submarine cruise	0.3%	0.1%	0.2%	120

Benefits Sought While on Vacation

Similar to the average U.S. Pleasure Traveler, the majority of Shoppers and Diners take a vacation to get a break from their day-to-day environment, relax and relieve stress, create lasting memories, enrich family relationships, and live without a fixed schedule. In fact, getting a break, relaxing and relieving stress, creating lasting memories and enriching family relationships are more important to Shoppers and Diners than to the average U.S. Pleasure Traveler. Shoppers and Diners are also more likely than the average U.S. Pleasure Traveler to consider it important that a destination offers learning opportunities (e.g., enrich your perspective on life, gain knowledge of history and other cultures or places, stimulate your mind, see or do something new and different).

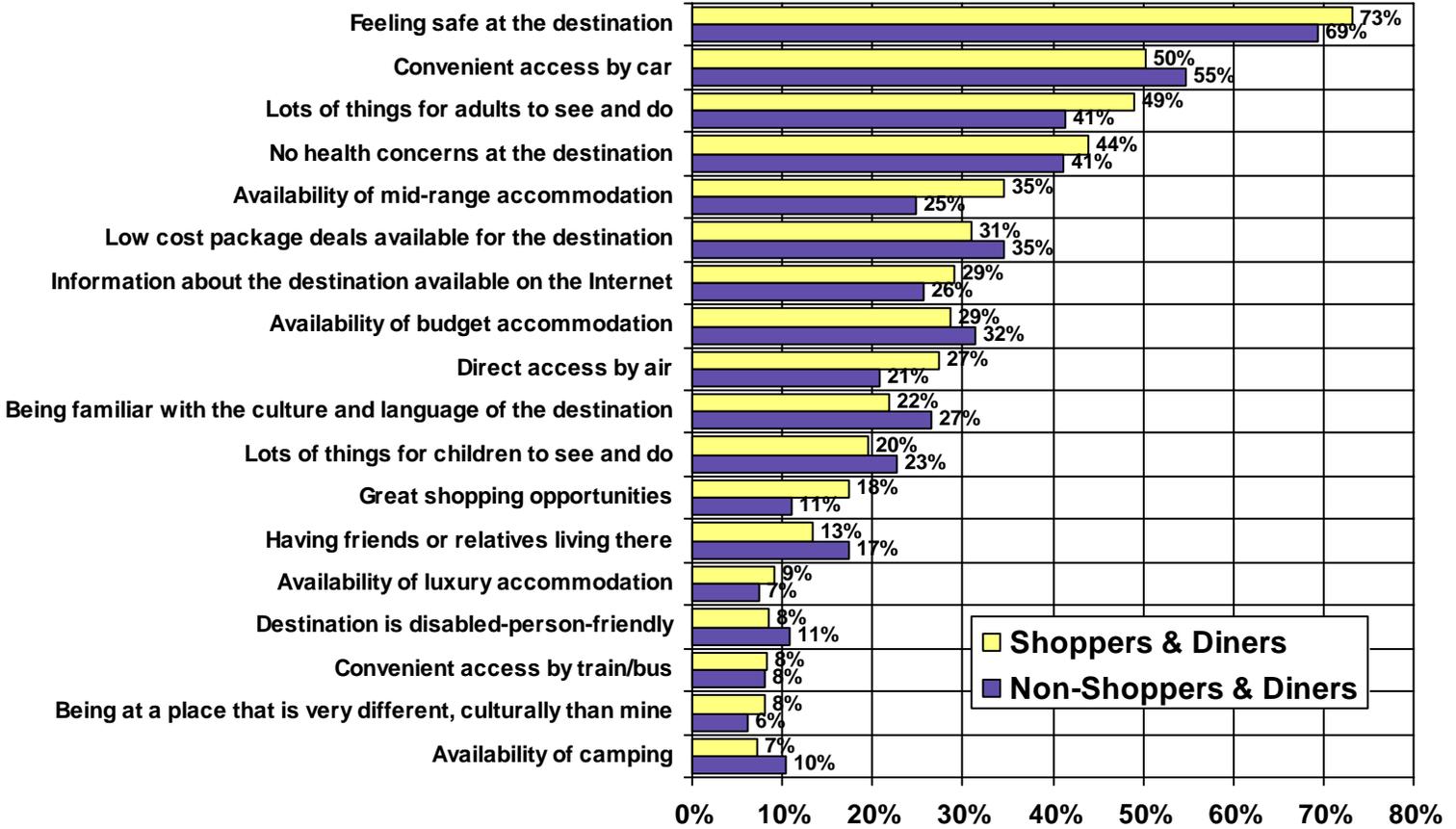
Fig.13 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")



Other Attributes of a Destination Considered Important

Most Shoppers and Diners consider it highly important that a destination is safe and conveniently accessible by car. They also consider it important that the destination offers lots of things for adults to see and do, mid-range priced accommodation, direct access by air and great shopping opportunities.

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



How Destinations Are Selected

Similar to U.S. Pleasure Travellers overall, most Shoppers and Diners have a destination in mind when they start planning both summer (58.9%) and winter (59.4%) vacations. Shoppers and Diners select their vacation destinations in a way that is similar to that of the average U.S. Pleasure Traveler.

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

	Shoppers and Diners	Non-Shoppers and Diners	Pleasure Travelers	Index
Size of Market	132,497,116	38,013,125	170,510,241	100
Summer				
Started with a desired destination in mind	58.9%	55.3%	58.2%	101
Started by considering specific activities wanted to do	9.7%	10.8%	9.9%	98
Started with a certain type of vacation experience in mind	17.8%	15.2%	17.3%	103
Looked for packaged deals - no destination in mind	1.1%	1.0%	1.1%	103
Considered something else first	4.3%	5.5%	4.6%	95
Don't Know / Other	8.1%	12.2%	8.9%	91
Winter				
Started with a desired destination in mind	59.4%	56.9%	58.9%	101
Started by considering specific activities wanted to do	11.3%	11.1%	11.3%	100
Started with a certain type of vacation experience in mind	15.4%	11.8%	14.8%	104
Looked for packaged deals - no destination in mind	1.5%	1.1%	1.4%	105
Considered something else first	5.0%	7.0%	5.3%	93
Don't Know / Other	7.4%	12.1%	8.3%	90

Trip Planning and Information Sources Consulted

Most Shoppers and Diners are solely (39.7%) or partly responsible (17.9%) for planning their vacations. The majority use Internet websites and take past experiences into account when planning trips. Relative to the average U.S. Pleasure Traveler, they are slightly more likely to get travel information from newspaper or magazine articles, travel guidebooks such as Fodor's, and television programs.

Fig. 16 Who Plans Vacations and Information Sources Consulted

		Shoppers and Diners	Non-Shoppers and Diners	Pleasure Travelers	Index
Size of Market		132,497,116	38,013,125	170,510,241	100
Who Plans Trips?	Respondent plans trips	39.7%	37.3%	39.2%	101
	Trip planning a shared responsibility	17.9%	16.7%	17.6%	101
	Someone else plans trips	42.4%	46.0%	43.2%	98
Information Sources Consulted	An Internet website	79.5%	62.3%	76.0%	105
	Past experience / Been there before	57.7%	41.9%	54.5%	106
	Advice of others / Word-of-mouth	49.0%	31.2%	45.4%	108
	Maps	35.3%	22.3%	32.7%	108
	An auto club such as AAA	26.0%	16.3%	24.0%	108
	Official travel guides or brochures from state/province	23.4%	9.6%	20.6%	114
	Visitor information centres	22.9%	10.4%	20.4%	112
	Articles in newspapers / magazines	20.8%	7.8%	18.1%	115
	A travel agent	20.4%	11.6%	18.6%	110
	Travel information received in the mail	17.7%	8.2%	15.8%	112
	Travel guide books such as Fodor's	14.0%	4.1%	12.0%	117
	Advertisements in newspapers / magazines	12.3%	5.2%	10.9%	113
	Programs on television	8.2%	2.9%	7.1%	115
	An electronic newsletter or magazine received by e-mail	6.9%	2.6%	6.0%	114
	Advertisements on television	4.4%	2.4%	4.0%	110
	Visits to trade, travel or sports shows	2.8%	1.2%	2.4%	113

Use of the Internet to Plan and Arrange Trips

Shoppers and Diners are more likely than the average U.S. Pleasure Traveler to use the Internet when planning and arranging trips (73.7% planning, 57.1% booking online). The majority of Shoppers and Diners use travel planning / booking websites such as Expedia, and hotel or resort websites. They most often book accommodations and airline tickets over the Internet.

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

		Shoppers and Diners	Non-Shoppers and Diners	Pleasure Travelers	Index
Size of Market		132,497,116	38,013,125	170,510,241	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	26.3%	47.2%	31.0%	85
	Uses Internet to plan trips only	20.4%	19.0%	20.1%	102
	Uses Internet to book part of trip	53.3%	33.8%	48.9%	109
Types of Websites Consulted	A travel planning / booking website	57.9%	44.6%	55.6%	104
	A website of a hotel or resort	55.6%	41.7%	53.3%	104
	An airline's website	48.0%	33.5%	45.6%	105
	A tourism website of a country / region / city	37.5%	23.0%	35.1%	107
	A website of an attraction	35.1%	24.7%	33.4%	105
	Some other website	25.6%	22.2%	25.1%	102
	A cruise line website	13.4%	7.6%	12.4%	108
	A motorcoach website	1.4%	1.0%	1.3%	105
Parts of Trips Booked Over The Internet	Accommodations	72.6%	67.8%	71.9%	101
	Air tickets	72.4%	60.3%	70.6%	103
	Car rental	39.6%	29.1%	38.0%	104
	Tickets or fees for specific activities or attractions	27.2%	21.6%	26.3%	103
	A package containing two or more items	18.6%	13.4%	17.8%	104
	Tickets for rail, bus or boat / ship fares	12.7%	7.4%	11.9%	107
	Other	2.8%	3.6%	2.9%	96

Media Consumption Habits

The majority of Shoppers and Diners read the travel section of weekend newspapers and visit travel-related websites. Shoppers and Diners are also more likely than the average U.S. Pleasure Traveler to read travel magazines and watch travel-related shows on television. TV shopping channels and shopping websites, as well as home and garden television shows and websites are also slightly more likely than average to be viewed by Shoppers and Diners.

Fig. 18 Media Consumption Habits

		Shoppers and Diners	Non-Shoppers and Diners	Pleasure Travelers	Index
Size of Market		132,497,116	38,013,125	170,510,241	100
Newspaper Readership	Reads daily newspaper	61.3%	54.9%	59.9%	102
	Reads weekend edition of newspaper	57.5%	48.8%	55.5%	103
	Reads local neighbourhood or community newspapers	51.2%	43.8%	49.5%	103
	Reads other types of newspapers	15.0%	9.9%	13.9%	108
	Frequently or occasionally reads travel section of daily newspaper	45.8%	33.2%	43.0%	107
	Frequently or occasionally reads travel section of weekend newspaper	52.7%	37.4%	49.3%	107
Types of Magazines Read (Top 5 Indexed)	Travel (e.g., Condé Nast)	12.3%	4.9%	10.6%	116
	Magazines about your city	7.9%	3.3%	6.9%	115
	Regional magazines	7.7%	3.5%	6.8%	114
	Fashion and beauty	15.4%	8.9%	14.0%	110
	Business, finance and investing	15.3%	9.4%	14.0%	109
Type of Television Programs Watched (Top 5 Indexed)	Travel shows	31.4%	20.3%	28.9%	109
	Shopping channels	8.2%	6.1%	7.7%	106
	Home & garden shows	34.2%	26.1%	32.4%	106
	Late night talk shows	28.5%	22.1%	27.1%	105
	Cooking shows	38.7%	31.1%	37.0%	105
Type of Radio Programs Listened To (Top 5 Indexed)	Classical music	15.2%	10.4%	14.1%	108
	Jazz / Big band	10.8%	7.4%	10.0%	108
	Soft music / Adult contemporary	26.4%	18.3%	24.6%	107
	News / Talk / Information	34.4%	25.3%	32.4%	106
	Multicultural	5.0%	3.8%	4.7%	106
Types of Websites Visited (Top 5 Indexed)	Travel	51.8%	33.0%	48.0%	108
	Magazine sites	15.7%	11.1%	14.8%	106
	House and home	30.2%	23.0%	28.7%	105
	Network news sites (e.g., CNN)	40.6%	31.0%	38.7%	105
	Shopping (all types)	59.5%	46.2%	56.8%	105

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	