

CANADIAN TRAVEL MARKET

Canadian Travelers to Saskatchewan

A Profile Report

February 5, 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, 7.6% of adult Canadians (1,840,502) took an overnight trip to the province of Saskatchewan. 64.4% (1,185,604) of these Saskatchewan trips were "pleasure trips". Among those who took a pleasure trip to Saskatchewan, 42.9% took two or more pleasure trips to the province during the last two years.

Those who visited Saskatchewan are most likely to live in Manitoba and Alberta. Those from Quebec were the least likely to have taken a trip to Saskatchewan.

Canadian Pleasure Travelers who visited Saskatchewan tend to be older and married without dependent children at home. They are less likely than average to have a university degree and report average household incomes. As such, Canadians who visited Saskatchewan tend to be over-represented among mature, middle-class couples.

Canadians who visited Saskatchewan are more active in outdoor activities than the average Canadian Pleasure Traveler. They were especially more likely to have participated in nature-oriented activities (e.g., hunting, fishing, hiking, climbing and paddling, wilderness activities) and to have played golf and other sports and games (e.g., tennis, board games) while traveling during the last two years. They were also more likely than others to have attended equestrian and western events, professional sporting events and fairs and festivals while on trips. They exhibit above-average interest in educational, participatory activities (e.g., participatory historical activities, aboriginal cultural experiences, agro-tourism) and were more likely than others to have visited educational exhibits (e.g., science and technology exhibits), to have gambled in a casino and to have participated in a wine, beer or food tasting during the last two years. Visitors to Saskatchewan most often stayed at public or private campgrounds. However, they were also more likely than average to have stayed in a wilderness area and to have toured using a motor home or RV.

Saskatchewan Visitors prefer vacations that create lasting memories, help keep families alive, provide opportunities to reconnect with family or friends or provide isolation and solitude. These findings suggest that most individuals currently visit Saskatchewan to enjoy its natural assets.

Saskatchewan Visitors are slightly above-average users of the Internet for planning (64.0%) and booking travel (42.2%). Their use of travel media is also only slightly above-average. They may be most effectively reached through country music radio, science and nature programs and magazines, sports programming and house and home websites and magazines.

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 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 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 Canadians who live in other provinces who visited Saskatchewan and compares them with other Canadian Pleasure Travelers (i.e., those who took at least one pleasure trip in the last two years). This report is part of a series of eight reports reviewing the out-of-province travel activities of Canadians to specific destinations within Canada prepared using the Canadian TAMS database.

Canadian Travelers to Saskatchewan

Market Incidence

Over the last two years, 7.6% of adult Canadians (1,840,502) took an overnight trip to the province of Saskatchewan (for any purpose). 64.4% (1,185,604) of those who took a trip to Saskatchewan report taking a “pleasure trip” to the province. Overall, 6.6% of Canadian Pleasure Travelers reported taking at least one pleasure trip to Saskatchewan during the past two years. Among those who took a pleasure trip to Saskatchewan, 42.9% took two or more pleasure trips to the province in the last two years.

Fig. 1 Incidence of Trips¹ to Saskatchewan during the Past Two Years

	Saskatchewan
Number of Out-of-Province Canadians Taking a Trip to Province (Any Purpose) ²	1,840,502
Percent of Canadian Population	7.6%
Number of Out-of-Province Canadians Taking a Pleasure Trip to Province ³	1,185,604
Percent of Canadian Pleasure Travelers ⁴	6.6%
Percent of Canadian Pleasure Travelers Taking Two or More Pleasure Trips to Province ⁵	42.9%

- 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 Saskatchewan in the last two years for any purpose.
- 3 - This row reports the number of the out-of-province Canadians who took a “pleasure trip” to Saskatchewan during the past two years.
- 4 - “Pleasure Travelers” are defined as individuals who took at least one out-of-town, pleasure trip of one or more nights in the last two years. This row reports the percent of out-of-province Canadian “Pleasure Travelers” who took a trip to Saskatchewan.
- 5 - This row reports the percent of out-of-province Canadian Pleasure Travelers who visited Saskatchewan who took two or more pleasure trips to Saskatchewan during the last two years.

Incidence by Region

Those who took a pleasure trip to Saskatchewan are most likely to live in the neighbouring provinces of Manitoba and Alberta. Those from Quebec were the least likely to have taken a pleasure trip to Saskatchewan during the last two years.

Fig. 2 Geographic Distribution of Those Who Took a Trip to Saskatchewan

	Population	Estimated Number Who Took a Pleasure Trip to Saskatchewan	Percent of Pleasure Travelers Who Took a Pleasure Trip to Saskatchewan	Percent of Total Population Who Took a Pleasure Trip to Saskatchewan
Canada	24,069,778	1,185,604	6.6%	3.4%
Atlantic Provinces	1,822,494	31,905	2.5%	1.2%
Quebec	5,940,869	63,894	1.5%	0.8%
Ontario	9,671,592	198,445	2.8%	1.7%
Manitoba	843,107	194,525	32.7%	34.6%
Alberta	2,465,540	487,728	24.3%	8.3%
British Columbia	3,326,176	209,106	7.9%	3.3%

Demographic Profile

Relative to the average Canadian Pleasure Traveler, those who visited Saskatchewan are somewhat more likely to be older and married (76.0% versus 67.7% overall). They are also slightly less likely than other Canadian Pleasure Travelers to have a university degree (28.6% versus 31.2% overall) and report average household incomes. Overall, visitors to Saskatchewan are over-represented among mature, middle-class couples.

Fig. 3 Demographic Profile of Visitors to Saskatchewan Relative to All Out-of-Province Canadian Pleasure Travelers

Attribute	Size of Market	Took a Pleasure Trip to Saskatchewan	Did Not Take a Pleasure Trip to Saskatchewan ¹	Pleasure Travelers	Index ²
	1,185,604	16,712,248	17,897,852	100	
Gender	Male	51.0%	48.7%	48.9%	104
	Female	49.0%	51.3%	51.1%	96
Age of Respondent	18 to 24	7.6%	13.1%	12.8%	60
	25 to 34	19.0%	19.4%	19.3%	98
	35 to 44	18.4%	20.7%	20.6%	89
	45 to 54	20.4%	20.3%	20.3%	101
	55 to 64	18.8%	13.9%	14.2%	132
	65 Plus	15.8%	12.6%	12.8%	123
Average Age		47.4	44.3	44.5	N/A
Marital Status	Not married	24.0%	32.9%	32.3%	74
	Married	76.0%	67.1%	67.7%	112
Parental Status	No children under 18	73.7%	71.0%	71.2%	104
	Children under 18	26.3%	29.0%	28.8%	91
Education	High school or less	40.2%	35.4%	35.8%	112
	Some post-secondary	9.7%	11.3%	11.2%	87
	Post-secondary diploma/certificate	21.4%	22.0%	22.0%	98
	University degree	28.6%	31.2%	31.1%	92
Household Income	Under \$20,000	4.1%	5.7%	5.6%	73
	\$20,000 to \$39,999	12.2%	14.5%	14.4%	85
	\$40,000 to \$59,999	18.4%	16.4%	16.5%	111
	\$60,000 to \$79,999	15.4%	15.3%	15.3%	101
	\$80,000 to \$99,999	13.0%	12.2%	12.2%	106
	\$100,000 or more	23.6%	23.0%	23.1%	103
	Not stated	13.3%	12.9%	12.9%	103
Average Household Income		\$75,296	\$72,950	\$73,105	N/A

1 - 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 Saskatchewan on any trip.

2 - The "Index" is calculated by dividing the percent for those who visited Saskatchewan in each group by the percent of Pleasure Travelers in each group. The Index indicates the extent to which visitors are over or under-represented relative to the average out-of-province Canadian Pleasure Traveler. An index of 100 means the percent of visitors is the same as that of the average out-of-province Canadian Pleasure Traveler. Index values over 100 indicate that visitors are over-represented relative to the average out-of-province Canadian Pleasure Traveler. Index values less than 100 indicate that visitors are under-represented relative to the average out-of-province Canadian Pleasure Traveler.

Travel Activity (During Last Two Years)

Those who visited Saskatchewan during the last two years are frequent travelers, with 70.1% taking five or more pleasure trips in the last two years. (Note: 47.0% of Canadian Pleasure Travelers took five or more pleasure trips in the last two years). As such, they were somewhat more likely to have taken trips to the United States and Mexico than the average Canadian Pleasure Traveler. However, they were less likely than average to have traveled to the Caribbean or other overseas destinations during the last two years.

Those who visited Saskatchewan frequently traveled to other parts of Canada and especially Alberta (82.6%) and British Columbia (68.3%). Relative to other Canadian Pleasure Travelers, they were also more likely to have traveled to Manitoba and to the Northern Territories during the last two years.

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

	Took a Pleasure Trip to Saskatchewan	Did Not Take a Pleasure Trip to Saskatchewan	Pleasure Travelers	Index
Size of Market	1,185,604	16,712,248	17,897,852	100
Canada	100.0%	94.3%	94.6%	106
Took a trip within own province / region	88.6%	85.8%	86.0%	103
Took a trip to an adjacent province / region	93.0%	42.6%	46.0%	202
Took a trip to non-adjacent province / region	74.6%	27.7%	30.8%	242
Newfoundland & Labrador	4.2%	4.4%	4.4%	96
Prince Edward Island	9.8%	7.1%	7.3%	135
New Brunswick	15.7%	11.8%	12.1%	130
Nova Scotia	14.7%	12.9%	13.0%	113
Quebec	23.9%	41.0%	39.9%	60
Ontario	47.3%	55.1%	54.6%	87
Manitoba	45.4%	5.7%	8.3%	544
Saskatchewan	100.0%	0.0%	9.3%	1077
Alberta	82.6%	20.1%	24.3%	341
British Columbia	68.3%	27.6%	30.3%	226
Yukon	5.7%	0.7%	1.0%	578
Northwest Territories	2.9%	0.5%	0.6%	466
Nunavut	0.6%	0.3%	0.3%	205
United States	55.0%	50.8%	51.1%	108
Mexico	15.8%	12.2%	12.4%	127
Caribbean	11.2%	16.2%	15.9%	71
All other destinations	18.2%	21.2%	21.0%	87

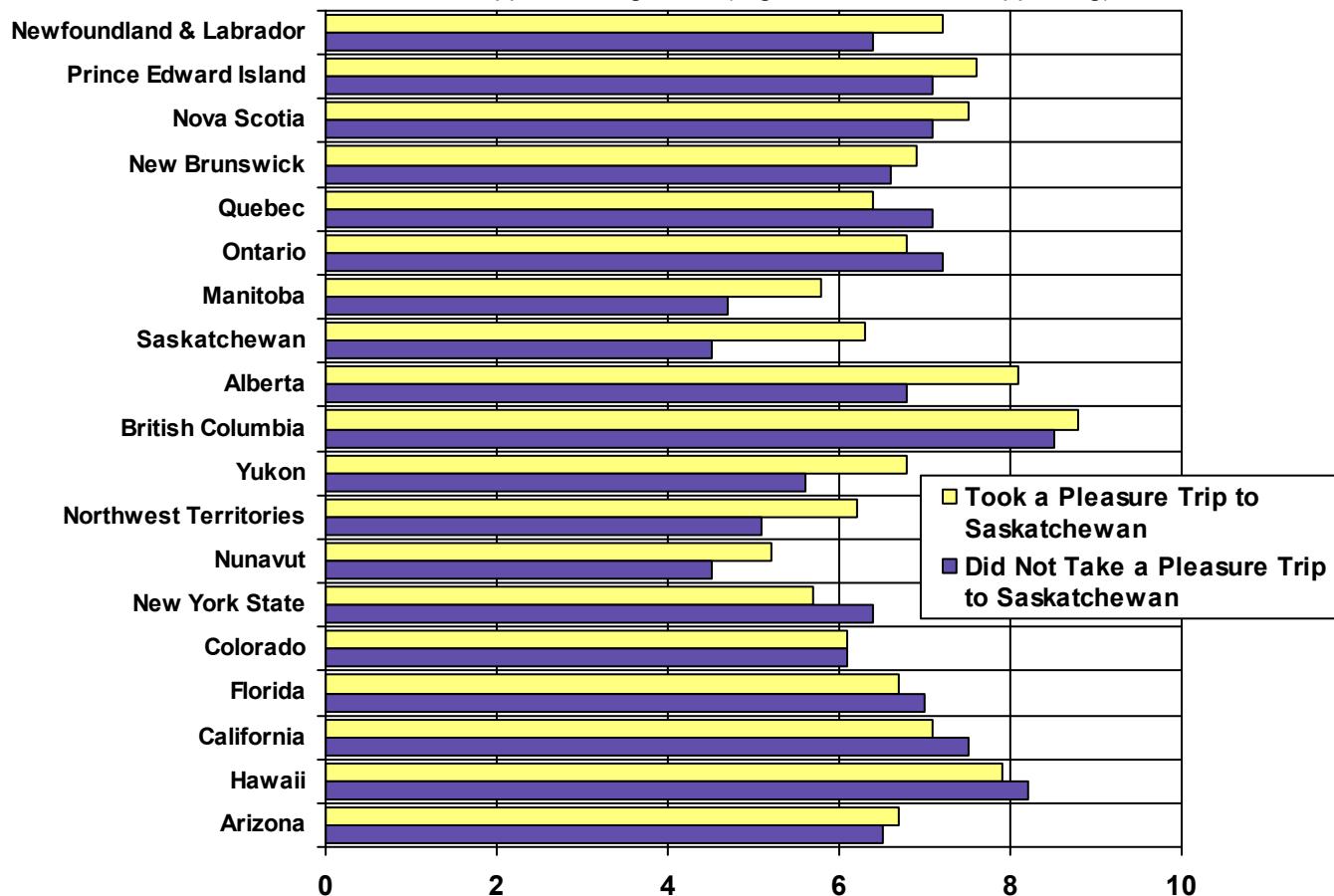
Appeal of Selected U.S. States, Canadian Provinces and Canadian Territories

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.

Canadian Travelers who visited Saskatchewan have a more favourable impression of the Western Provinces, the Northern Territories and the Atlantic Region than do other Canadian Pleasure Travelers. On the other hand, they have a slightly less favourable impression of Ontario and Quebec as travel destinations. British Columbia (8.8) was considered the most appealing Canadian destination followed by Alberta (8.1), Prince Edward Island (7.6) and Nova Scotia (7.5).

They perceived most of the six U.S. reference states to be less appealing travel destinations than other Canadian Pleasure Travelers.

Fig. 5 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

Canadians who visited Saskatchewan are more active than the average Canadian Pleasure Traveler in many culture and entertainment pursuits while on trips. The majority of Saskatchewan Visitors went shopping and dining and visited historical sites, museums and art galleries while on trips during the past two years. However, relative to the average Canadian Pleasure Traveler, those who visited Saskatchewan were especially likely to have attended equestrian and western events, professional sporting events and fairs and festivals while on trips. They were also more likely than others to have taken part in educational, participatory activities (e.g., participatory historical activities, aboriginal cultural experiences, agro-tourism) and to have visited educational exhibits (e.g., science and technology exhibits). In addition, they were also more likely than other Canadian Pleasure Travelers to have visited historical sites, museums and galleries, to have gambled in a casino and to have participated in a wine, beer or food tasting while on trips.

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

Size of Market	Took a Pleasure Trip to Saskatchewan	Did Not Take a Pleasure Trip to Saskatchewan	Pleasure Travelers	Index
	1,185,604	16,712,248	17,897,852	100
Shopping & Dining	88.3%	82.5%	82.9%	107
Historical Sites, Museums & Art Galleries	68.8%	57.7%	58.5%	118
Fairs & Festivals	47.5%	36.9%	37.6%	127
Theme Parks & Exhibits	44.0%	38.8%	39.1%	113
Musical Concerts, Festivals & Attractions	36.0%	32.4%	32.6%	110
Casinos	30.2%	25.5%	25.8%	117
Science & Technology Exhibits	28.2%	22.7%	23.0%	122
Wine, Beer & Food Tastings	27.9%	23.8%	24.1%	116
Professional Sporting Events	25.1%	14.9%	15.5%	161
Agro-Tourism	24.4%	14.9%	15.5%	158
Garden Theme Attractions	23.0%	17.3%	17.7%	130
Live Theatre	21.5%	21.2%	21.2%	102
Aboriginal Cultural Experiences	19.4%	11.0%	11.6%	168
High Art Performances	13.1%	10.9%	11.1%	118
Participatory Historical Activities	13.1%	6.2%	6.6%	197
Equestrian & Western Events	12.4%	6.1%	6.5%	189
Amateur Tournaments	12.3%	11.6%	11.6%	106
Spas	11.7%	9.7%	9.8%	119
Comedy Festivals & Clubs	9.7%	10.2%	10.2%	95
National & International Sporting Events	6.7%	2.8%	3.1%	215
Literary & Film Festivals	1.9%	2.7%	2.6%	72

Culture and Entertainment Activities Pursued While Not on Trips

Similar to the average Canadian Pleasure Traveler, the majority of those who took a pleasure trip to Saskatchewan dine in local restaurants and attend local festivals or fairs while not traveling. However, relative to the average Canadian Pleasure Traveler, visitors to Saskatchewan are more likely to attend local rodeos or other local sporting events (e.g., professional sporting events, amateur tournaments). They are also more likely than others to visit local educational attractions (e.g., historic sites or heritage buildings, local museums, local zoos and aquariums). On the other hand, perhaps reflecting the maturity of this travel segment, they are less likely to go dancing, to go to bars with rock bands or to attend rock concerts.

Fig. 7 Culture and Entertainment Activities Pursued While Not on Trips

Size of Market	Took a Pleasure Trip to Saskatchewan	Did Not Take a Pleasure Trip to Saskatchewan	Pleasure Travelers	Index
	1,185,604	16,712,248	17,897,852	100
Going out to eat in restaurants	93.4%	91.4%	91.6%	102
Going to festivals or fairs	65.3%	61.3%	61.6%	106
Going to amateur sporting events	53.0%	40.6%	41.5%	128
Going to historic sites or heritage buildings	48.1%	38.7%	39.4%	122
Going to pick-your-own farms or farmers' market	46.2%	40.9%	41.2%	112
Going to museums	41.6%	32.1%	32.7%	127
Going to professional sporting events	38.7%	31.7%	32.2%	120
Going to live theatre	36.4%	34.9%	35.0%	104
Going to zoos or aquariums	36.1%	30.4%	30.8%	117
Going to art galleries or art shows	32.0%	31.9%	31.9%	100
Going to amusement or theme parks	28.2%	29.2%	29.2%	97
Going dancing	27.6%	30.1%	29.9%	92
Going to botanical gardens	25.7%	25.7%	25.7%	100
Going to bars with live pop or rock bands	23.8%	27.9%	27.6%	86
Going to rock music concerts	21.6%	22.6%	22.5%	96
Going to gamble in casinos	21.5%	17.8%	18.1%	119
Going to rodeos	19.9%	6.1%	7.0%	285
Going to classical music concerts	18.9%	16.5%	16.7%	113
Going to day spas	12.8%	13.8%	13.7%	93
Staying overnight in a hotel or B&B in own city	9.8%	10.0%	10.0%	99
Going to jazz clubs	8.3%	7.6%	7.6%	109
Going to the opera	7.4%	6.7%	6.7%	109
Going to the ballet	7.0%	7.4%	7.3%	96

Outdoor Activities Pursued While on Trips

Canadian Pleasure Travelers who visited Saskatchewan were quite active in most outdoor activities while on trips during the past two years. Most Saskatchewan Visitors went wildlife viewing, boating and swimming while on trips in the past two years.

However, relative to the average Canadian Pleasure Traveler, those who visited Saskatchewan were especially more likely to participate in nature-oriented activities while on trips (e.g., hunting, fishing, hiking, climbing and paddling, wilderness activities). They were also more likely than others to have played golf and other sports and games (e.g., tennis, board games) while traveling during the last two years.

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

Size of Market	Took a Pleasure Trip to Saskatchewan	Did Not Take a Pleasure Trip to Saskatchewan	Pleasure Travelers	Index
1,185,604	16,712,248	17,897,852	100	
Wildlife Viewing	56.6%	40.0%	41.1%	138
Ocean Activities (e.g., swimming in ocean, sunbathing)	52.7%	48.5%	48.8%	108
Boating & Swimming (e.g., motorboating, swimming in lakes)	51.4%	40.3%	41.1%	125
Hiking, Climbing & Paddling	43.2%	33.6%	34.2%	126
Fishing	33.0%	22.6%	23.3%	141
Sports & Games (e.g., tennis, board games)	29.8%	22.1%	22.6%	132
Golfing	27.5%	17.4%	18.1%	152
Exercising & Jogging	18.9%	15.6%	15.8%	119
Cycling	17.0%	13.5%	13.7%	124
Downhill Skiing & Snowboarding	15.7%	14.6%	14.7%	107
Team Sports (e.g., hockey, baseball)	13.9%	11.0%	11.2%	124
Skating (e.g., ice skating, rollerblading)	13.4%	11.9%	12.0%	112
Snowmobiling & ATVising	13.1%	11.1%	11.3%	116
Cross-country Skiing & Snowshoeing	8.3%	9.5%	9.4%	88
Hunting	6.4%	4.5%	4.6%	137
Horseback Riding	6.0%	4.8%	4.9%	122
Sailing & Surfing (e.g., sailing, windsurfing, parasailing)	5.3%	6.4%	6.3%	85
Freshwater Scuba & Snorkeling	4.0%	3.0%	3.0%	131
Wilderness Activities (e.g., wilderness skills course)	3.8%	2.3%	2.4%	159
Motorcycling	3.7%	2.9%	3.0%	125
Extreme Air Sports (e.g., parachuting)	1.2%	1.1%	1.1%	113

Outdoor Activities Pursued While Not on Trips

When NOT traveling, Canadians who visited Saskatchewan are moderately active in outdoor activities. Similar to the average Canadian Pleasure Traveler, the majority of Saskatchewan Visitors go on day outings to local parks and picnic, garden, exercise and swim while not traveling. However, relative to other Canadian Pleasure Travelers, those who visited Saskatchewan are especially likely to participate in nature-oriented activities (e.g., hunting, fishing, canoeing and kayaking, camping, hiking, horseback riding). They are also more likely than others to play golf while not traveling. On the other hand, reflecting the maturity of this travel segment, visitors to Saskatchewan are less likely to participate in physically strenuous activities such as racquet sports (e.g., tennis), rollerblading, snowboarding and skateboarding.

Fig. 9 Outdoor Activities Pursued While NOT on Trips

Size of Market	Took a Pleasure Trip to Saskatchewan	Did Not Take a Pleasure Trip to Saskatchewan	Pleasure Travelers	Index
1,185,604	16,712,248	17,897,852	100	
Day outing to a park	73.3%	66.5%	66.9%	110
Gardening	66.9%	59.1%	59.7%	112
Exercising at home or at a fitness club	65.3%	60.6%	60.9%	107
Swimming	64.5%	60.0%	60.3%	107
Picnicking	60.0%	52.6%	53.1%	113
Hiking	58.7%	48.4%	49.1%	120
Camping	53.6%	37.1%	38.2%	140
Cycling	46.6%	44.4%	44.5%	105
Golfing	37.3%	28.4%	29.0%	129
Fishing	36.2%	28.4%	28.9%	125
Ice-skating	27.8%	28.5%	28.5%	98
Sailing or other boating	26.5%	23.0%	23.3%	114
Jogging	25.1%	24.0%	24.1%	105
Playing team sports	23.6%	22.8%	22.8%	103
Canoeing or kayaking	19.2%	17.0%	17.1%	112
Riding an all-terrain vehicle (ATV)	18.4%	13.7%	14.0%	131
Downhill skiing	16.3%	16.4%	16.4%	100
Playing racquet sports (e.g., tennis or badminton)	15.5%	19.7%	19.4%	80
Cross-country skiing	12.4%	12.6%	12.6%	98
Hunting	10.6%	7.4%	7.6%	140
Snowmobiling	10.4%	9.4%	9.5%	110
Rollerblading	9.9%	14.8%	14.5%	69
Horseback riding	9.1%	6.5%	6.7%	136
Snowboarding	4.0%	5.2%	5.1%	79
Skateboarding	0.7%	1.7%	1.6%	43

Accommodation Stayed In While on Trips

Canadian Pleasure Travelers who visited Saskatchewan in the past two years most often stayed in public or private campgrounds. However, relative to other Canadian Pleasure Travelers, those who visited Saskatchewan were much more likely to have stayed in a wilderness setting (e.g., campsite, remote or car-accessible lodge), toured in a motor home or RV or to have stayed at a farm or guest ranch during the past two years.

Fig. 10 Accommodation Stayed In While on Trips

Size of Market	Took a Pleasure Trip to Saskatchewan	Did Not Take a Pleasure Trip to Saskatchewan	Pleasure Travelers	Index
	1,185,604	16,712,248	17,897,852	100
A Public Campground in a National, State, Provincial or Municipal Park	41.7%	24.9%	26.0%	161
A Private Campground	32.2%	17.9%	18.8%	171
Lakeside / Riverside Resort	28.1%	21.9%	22.3%	126
Seaside Resort	21.9%	20.9%	21.0%	105
Ski Resort or Mountain Resort	18.2%	13.7%	14.0%	130
A Camp Site in a Wilderness Setting (Not a Campground)	14.7%	8.2%	8.7%	169
A Motor Home or RV while Traveling or Touring (Not a Camping Trip)	10.9%	4.0%	4.4%	247
Wilderness Lodge You Can Drive to by Car	8.4%	5.4%	5.6%	149
Farm or Guest Ranch	6.4%	2.7%	2.9%	217
Health Spa	5.5%	5.8%	5.8%	95
Country Inn or Resort with Gourmet Restaurant	3.9%	5.3%	5.2%	75
Remote or Fly-In Wilderness Lodge	3.3%	1.4%	1.6%	211
On a Houseboat	2.4%	1.2%	1.3%	192
Remote or Fly-In Wilderness Outpost	0.6%	0.6%	0.6%	103
Cooking School	0.2%	0.4%	0.4%	55
Wine Tasting School	0.1%	0.3%	0.3%	48

Tours and Cruises Taken During Past Two Years

Those who visited Saskatchewan were more likely than other Canadian Pleasure Travelers to have taken certain types of tours and cruises during the last two years. Self-guided and guided sameday tours, scenic countryside drives and city tours were the most popular tours among Saskatchewan Visitors. However, relative to other Canadian Pleasure Travelers, those who visited Saskatchewan were especially likely to have taken wilderness tours, multi-location self guided tours, scenic country drives and tours of factories, casinos and wineries. They were also more likely than others to have taken Alaskan cruises as well as freshwater cruises (e.g., cruises on a lake or river).

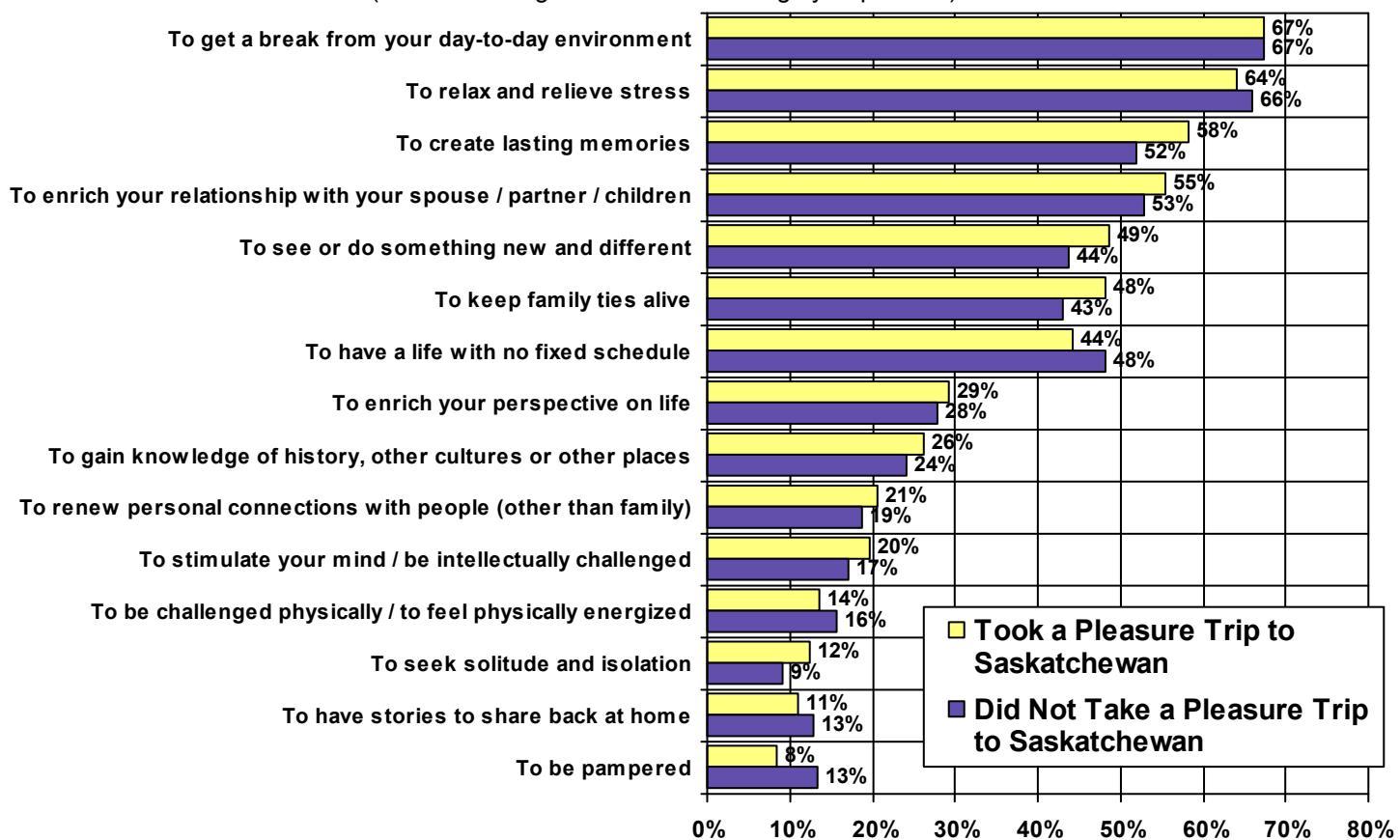
Fig. 11 Tours and Cruises Taken During Past Two Years

Size of Market	Took a Pleasure Trip to Saskatchewan	Did Not Take a Pleasure Trip to Saskatchewan	Pleasure Travelers	Index
	1,185,604	16,712,248	17,897,852	100
A self-guided, sameday tour while on an overnight trip	33.8%	29.0%	29.3%	115
Around the countryside - scenic drives	29.3%	22.0%	22.5%	130
Around the city	28.0%	23.2%	23.5%	119
An organized, sameday guided tour while on an overnight trip	27.4%	21.9%	22.2%	123
A self-guided, overnight tour where you stayed in different locations	22.4%	17.9%	18.2%	123
Wilderness tour	18.1%	12.7%	13.0%	138
On the water (sightseeing cruise)	17.0%	12.9%	13.2%	129
Some other type of tour	13.0%	9.6%	9.8%	133
An organized, overnight guided tour where you stayed in different locations	11.0%	10.1%	10.1%	108
An organized, overnight guided tour where you stayed in a single location	8.6%	7.8%	7.8%	110
To a casino	8.6%	6.5%	6.6%	130
To a winery	7.3%	5.6%	5.7%	127
Caribbean ocean cruise	5.2%	5.5%	5.5%	95
Ocean cruise - Other	5.0%	3.3%	3.4%	147
To a factory	3.9%	2.6%	2.7%	146
Cruise on another lake or river	2.9%	2.4%	2.4%	120
Some other type of cruise	2.6%	1.5%	1.6%	161
Alaskan ocean cruise	2.2%	1.6%	1.6%	134
In the air as a pilot or passenger of an airplane or helicopter	1.9%	1.9%	1.9%	100
Cruise on the St. Lawrence River	0.7%	2.1%	2.0%	35
Great Lakes cruise	0.4%	0.8%	0.8%	44
Submarine cruise	0.3%	0.1%	0.1%	223

Benefits Sought While on Vacation

Similar to other Canadian Pleasure Travelers, the majority of those who visited Saskatchewan take vacations 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 Canadian Pleasure Travelers, Saskatchewan Visitors are more likely to seek vacations that create lasting memories, help keep family ties alive, provide opportunities to reconnect with family or friends or provide isolation and solitude. They also appreciate vacations that are intellectually stimulating, offer opportunities to learn and allow them to see and do something new. They are less likely than others to want to be pampered while on trips.

Fig.12 Benefits Sought While on Vacation
(Percent Rating Each Benefit as "Highly Important")

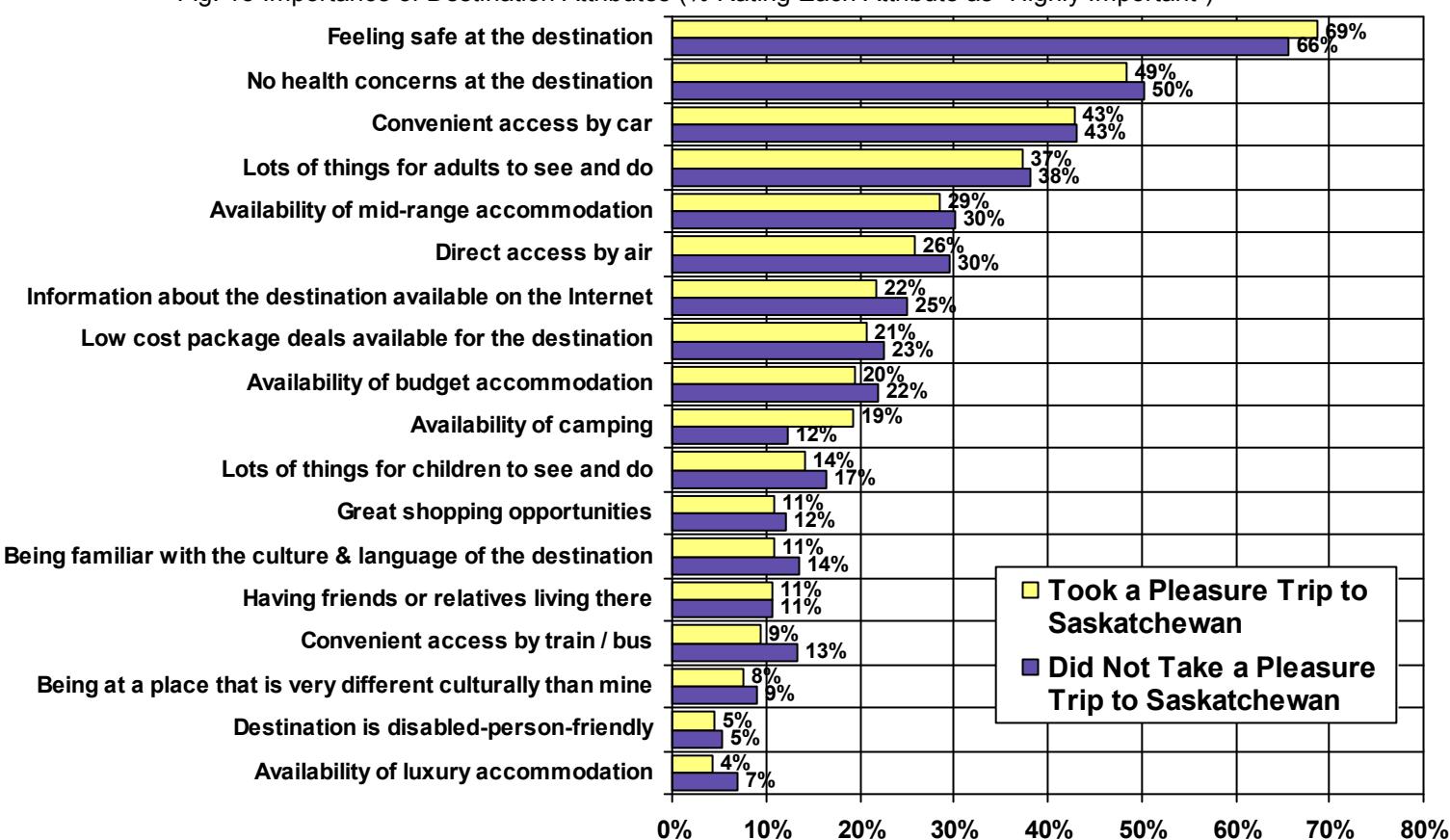


Other Attributes of a Destination Considered Important

As with most other Canadian Pleasure Travelers, the majority of Saskatchewan Visitors consider it important that they feel safe at a destination. They also consider it important that a destination is free of health concerns and is conveniently accessible by car.

Relative to other Canadian Pleasure Travelers, visitors to Saskatchewan are more likely to consider it important that a destination has camping available. On the other hand, they are less likely than others to consider it important that a destination has lots of activities for children, luxury accommodation, information on the Internet and a distinctive culture.

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



How Destinations Are Selected

Relative to the average Canadian Pleasure Traveler, Saskatchewan Visitors are more likely to begin planning their trips with a destination in mind than by considering what types of activities they would like to do or vacation experiences they would like to have.

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

	Took a Pleasure Trip to Saskatchewan	Did Not Take a Pleasure Trip to Saskatchewan	Pleasure Travelers	Index
Size of Market	1,185,604	16,712,248	17,897,852	100
Summer				
Started with a desired destination in mind	57.8%	47.7%	48.4%	119
Started by considering specific activities wanted to do	10.6%	14.1%	13.9%	76
Started with a certain type of vacation experience in mind	20.7%	23.9%	23.7%	87
Looked for packaged deals - no destination in mind	0.6%	1.4%	1.3%	42
Considered something else first	3.3%	4.4%	4.3%	76
Don't know / Other	7.0%	8.5%	8.4%	83
Winter				
Started with a desired destination in mind	57.3%	47.8%	48.5%	118
Started by considering specific activities wanted to do	14.4%	15.7%	15.7%	92
Started with a certain type of vacation experience in mind	15.9%	19.5%	19.3%	83
Looked for packaged deals - no destination in mind	2.1%	3.3%	3.2%	63
Considered something else first	3.0%	4.8%	4.7%	64
Don't know / Other	7.3%	8.8%	8.7%	85

Trip Planning and Information Sources Consulted

Most of those who took a trip to Saskatchewan in the past two years were responsible for planning their trips either on their own (42.8%) or with someone else (20.6%).

However, this travel segment is more likely than others to plan trips with someone else (most likely a spouse).

When making vacation plans, Saskatchewan Visitors consult a wider variety of sources than the average Canadian Pleasure Traveler. The majority use Internet websites, past experience, the advice of others and maps to help plan travel. However, those who visited Saskatchewan are more likely than others to obtain travel information from the official travel brochures and information centers of specific states or provinces, auto clubs such as CAA, television programs and advertising and trade, travel and sports shows.

Fig. 15 Who Plans Vacations and Information Sources Consulted

		Took a Pleasure Trip to Saskatchewan	Did Not Take a Pleasure Trip to Saskatchewan	Pleasure Travelers	Index
Size of Market		1,185,604	16,712,248	17,897,852	100
Who Plans Trips?	Respondent plans trips Trip planning a shared responsibility Someone else plans trips	36.6% 20.6% 42.8%	42.5% 16.0% 41.5%	42.1% 16.3% 41.6%	87 126 103
Information Sources Consulted	An Internet website	68.4%	65.4%	65.6%	104
	Past experience / Been there before	58.4%	49.7%	50.3%	116
	Advice of others / Word-of-mouth	58.1%	50.5%	51.1%	114
	Maps	50.9%	31.0%	32.4%	157
	Official travel guides or brochures from state / province	37.8%	25.1%	26.0%	145
	Visitor information centres	34.9%	22.7%	23.5%	149
	A travel agent	34.4%	34.4%	34.4%	100
	An auto club such as CAA	27.3%	16.9%	17.6%	155
	Articles in newspapers / magazines	21.3%	21.0%	21.1%	101
	Travel guide books such as Fodor's	16.9%	13.5%	13.8%	123
	Advertisements in newspapers / magazines	15.3%	14.3%	14.4%	107
	Programs on television	12.7%	7.2%	7.6%	168
	Travel information received in the mail	12.0%	8.6%	8.8%	136
	Advertisements on television	7.2%	4.8%	5.0%	144
	An electronic newsletter or magazine received by e-mail	5.2%	4.1%	4.2%	126
	Visits to trade, travel or sports shows	4.8%	3.0%	3.2%	152

Use of the Internet to Plan and Arrange Trips

Canadians who took a trip to Saskatchewan are slightly above-average users of the Internet to plan (64.0%) and book travel (42.2%). The majority of the Saskatchewan Visitors who use the Internet visit hotel or resort websites, tourism websites of countries, regions or cities and airline websites. However, this travel segment is especially likely to consult the tourism websites of countries, regions or cities and airline websites.

Similar to the average Canadian Pleasure Traveler, Saskatchewan Visitors most often use the Internet to purchase airline tickets and accommodation. However, they are also more likely than others to arrange car rentals over the Internet.

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

		Took a Pleasure Trip to Saskatchewan	Did Not Take a Pleasure Trip to Saskatchewan	Pleasure Travelers	Index
Size of Market		1,185,604	16,712,248	17,897,852	100
Percent Using Internet to Plan or Book Travel	Does not use the Internet	35.9%	40.9%	40.5%	89
	Uses Internet to plan trips only	21.8%	22.1%	22.1%	99
	Uses Internet to book part of trip	42.2%	37.0%	37.4%	113
Types of Websites Consulted	A website of a hotel or resort	60.5%	56.8%	57.0%	106
	A tourism website of a country / region / city	59.8%	49.1%	49.9%	120
	An airline website	56.9%	45.6%	46.4%	123
	A travel planning / booking website	46.2%	45.8%	45.8%	101
	A website of an attraction	37.3%	34.2%	34.4%	109
	Some other website	30.3%	27.3%	27.5%	110
	A cruise line website	9.0%	8.1%	8.1%	110
	A motorcoach website	2.7%	2.4%	2.5%	109
Parts of Trips Booked Over The Internet	Air tickets	78.0%	68.7%	69.4%	112
	Accommodation	67.5%	69.4%	69.3%	97
	Car rental	36.6%	26.4%	27.2%	135
	Tickets or fees for specific activities or attractions	25.4%	23.5%	23.6%	107
	Tickets for rail, bus or boat / ship fares	16.4%	15.4%	15.4%	106
	A package containing two or more items	16.0%	15.5%	15.5%	103
	Other	1.9%	4.1%	3.9%	49

Media Consumption Habits

Canadians who traveled to Saskatchewan are slightly more likely than average to read the travel sections of newspapers, to watch travel programs on television and to visit travel websites. However, this segment may be more effectively targeted through country music radio stations, science and nature magazines and television programs, sports media (e.g., sports shows on television, sports websites, all-sports radio, professional sports magazines), and 'house and home' websites and magazines (e.g., house & home websites; craft, antiques & collectibles magazines).

Fig. 17 Media Consumption Habits

		Took a Pleasure Trip to Saskatchewan	Did Not Take a Pleasure Trip to Saskatchewan	Pleasure Travelers	Index
Size of Market		1,185,604	16,712,248	17,897,852	100
Newspaper Readership	Reads daily newspaper	87.4%	87.3%	87.3%	100
	Reads weekend edition of newspaper	87.8%	87.3%	87.4%	101
	Reads local neighbourhood or community newspapers	66.3%	61.2%	61.6%	108
	Reads other types of newspapers	20.7%	16.8%	17.1%	121
	Frequently or occasionally reads travel section of daily newspaper	47.4%	45.9%	46.0%	103
	Frequently or occasionally reads travel section of weekend newspaper	48.7%	47.6%	47.7%	102
Types of Magazines Read (Top 5 Indexed)	Science and geography	27.2%	15.9%	16.6%	164
	Outdoor activities / sports	19.4%	12.4%	12.9%	150
	Crafts, antiques and collectibles	17.3%	12.1%	12.4%	139
	General interest	39.2%	30.6%	31.1%	126
	Professional sports	10.0%	8.5%	8.6%	117
Type of Television Programs Watched (Top 5 Indexed)	Sports / sports shows	51.4%	42.7%	43.3%	119
	History	48.8%	41.3%	41.8%	117
	Travel shows	34.5%	30.3%	30.6%	113
	Science & nature shows	47.2%	43.7%	43.9%	107
	Dramas (e.g., Law & Order)	61.0%	57.0%	57.2%	107
Type of Radio Programs Listened To (Top 5 Indexed)	Country music	38.7%	22.0%	23.1%	168
	Oldies (50s, 60s, 70s, 80s)	38.0%	34.1%	34.4%	111
	All sports	12.0%	11.1%	11.2%	108
	Soft music / Adult contemporary	27.8%	25.9%	26.0%	107
	News / Talk / Information	41.8%	39.2%	39.4%	106
Types of Websites Visited (Top 5 Indexed)	House and home	33.2%	27.8%	28.2%	118
	Sites for specific activities or interests	42.3%	35.4%	35.9%	118
	Weather	65.1%	55.3%	55.9%	116
	Sports	31.2%	26.6%	26.9%	116
	Travel	57.2%	50.3%	50.7%	113

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		
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	