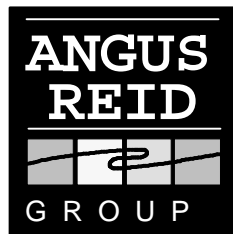


**1994**  
**NORTHERN TIER STATE STUDY**

**- Report -**



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## **1.0 INTRODUCTION**

### **1.1 BACKGROUND**

In order to better understand shifts in travel behaviour from the U.S. Northern Tier States, the six western provinces and northern territories (British Columbia, Alberta, Saskatchewan, Manitoba, Yukon and Northwest Territories) jointly funded a comprehensive market research study on the travel patterns of residents of those states. The Northern Tier States are defined as Alaska, Washington, Oregon, Idaho, Montana, North Dakota, South Dakota, and Minnesota. Recent data provided by Tourism Canada, indicates that travel from those states to Canada has been flat. All western provinces and territories have recognized the Northern Tier States as major revenue generators for Western/Northern Canada. Therefore, it is an important target market which needs to be examined as a region as well as highlighting differences between the states. Based on Tourism Canada information, these Northern Tier States generated nearly 2 million visits to the Western/Northern provinces and territories in 1992. Of those 2 million visits, the majority were to British Columbia, with Washington residents being the leading contributor.

For this study a total of 18 Metropolitan Statistical Areas (MSAs) were used to define the sample. The sample size for each of those MSAs is listed in Section 1.3. While those 18 MSAs do not include all of the urban centres in the Northern Tier States, they do represent most of the major markets in those states. These states encompass over 1.2 million square miles, with nearly half of that within the State of Alaska. Within that area there are 9.4 million residents and over three-quarters of those are concentrated within three major cities: the Seattle/Tacoma/Bremmerton MSA, the Minneapolis/St. Paul MSA, and the Portland/Salem/ Oregon MSA. In the 18 ADIs included in this study, a total of 1.95 million households have incomes of \$30,000+ per year. Eliminating households which have not travelled in the past two years and do not plan on travelling in the next year narrows the sample to 1.34 million households.

## 1.2 RESEARCH OBJECTIVES

A total of seven research objectives were established, and the report is structured to address them sequentially.

***Objective One:***            ***What is the current and potential size of the out-of-state vacation/pleasure market from northern tier households?***

- ∅      How large is the current market?
- ∅      What is the potential of this market for Western/Northern Canada?

***Objective Two:***            ***Who makes up the Northern Tier State travel market? Specifically:***

- ∅      What is their demographic profile?
- ∅      What was their recent travel behaviour?

***Objective Three:***            ***What types of travel experiences do these travellers seek?***

- ∅      What specific tourism products do they want?
- ∅      What benefits do they hope travel will provide them?

***Objective Four:***            ***What is their travel planning process?***

- ∅      What timing is used in trip planning?
- ∅      What information is used to plan trips?
- ∅      Where is travel information on Western and Northern Canada obtained?

***Objective Five: What is the current competitive situation for Western and Northern Canada?***

- Ø What levels of experience do these travellers have with Western and Northern Canada?
- Ø What is the profile of recent travellers to Western or Northern Canada?
- Ø What is the overall image of Western and Northern Canada, including individual provinces and territories?
- Ø What is the current level of advertising awareness for Western and Northern Canadian provinces and territories?

***Objective Six: What economic factors are affecting Northern travel?***

- Ø What is the overall price/value perception of Canadian tourism services?
- Ø What is the level of economic confidence and how does this affect travel planning?

***Objective Seven: How can these travellers be segmented to provide strategic and tactical information on how to target high yield groups?***

- Ø What are the underlying attitudes and motivations of these travellers?
- Ø How does the interrelationship of travel behaviour, attitudes and lifestyle information produce distinct market segments?
- Ø Which segments are the most appropriate for each province/territory to target?

### 1.3 THE SURVEY METHOD

The Northern Tier State Study involved 3,613 interviews with a random sample of travellers residing in eighteen of the largest urban centres (Metropolitan Statistical Area's - MSAs) in the Northern Tier States. Respondents who qualified for the survey lived in households with an income of \$30,000 or greater. A breakdown of sample by urban centre is provided below:

<b>Urban Centre</b>	<b>Completions</b>	<b>Error Range at 95% Confidence</b>
Juneau	200	3.1 - 7.1
Anchorage	200	3.1 - 7.1
Fairbanks	200	3.1 - 7.1
Seattle/Tacoma	450	2.1 - 4.8
Spokane	200	3.1 - 7.1
Portland/Salem	300	2.5 - 6.0
Eugene/Springfield	200	3.1 - 7.1
Boise/Caldwell	201	3.1 - 7.1
Pocatello/Idaho Falls	201	3.1 - 7.1
Billings	200	3.1 - 7.1
Great Falls	254	2.7 - 6.6
Fargo	90	4.8 - 10.5
Grand Forks	70	5.2 - 12.0
Rapid City	50	6.2 - 14.2
Sioux Falls	90	4.8 - 10.5
Minneapolis	351	2.3 - 5.4
Thief River Falls Area	256	2.7 - 6.6
Duluth	100	4.4 - 10.0



Surveys were conducted by Angus Reid Group using Computer Aided Telephone Interviewing from January 15 - February 28, 1994. The sample was generated by Survey Sampling Inc.. Final results were weighted to reflect proportionate representation of travelling households across the eighteen centres. The breakdown of unweighted and weighted sample is:

<b>MSA SAMPLING POINT</b>	<b>Actual Sample</b>	<b>Weighting Factor</b>	<b>Weighted Sample (Households)</b>
Total	3613	401.8	1,451,742
Juneau	200	29.48	5,896
Anchorage	200	226.40	45,280
Fairbanks	200	20.27	4,052
Seattle/Tacoma	450	1,137.09	511,692
Spokane	200	203.44	40,687
Portland/Salem	300	862.16	258,647
Eugene/Springfield	200	147.79	29,557
Boise/Caldwell	201	112.44	22,712
Pocatello/Idaho Falls	201	50.03	10,006
Billings	200	64.22	12,843
Great Falls	254	27.86	7,076
Fargo	90	160.93	14,484
Grand Forks	70	141.87	9,931
Rapid City	50	169.10	8,455
Sioux Falls	90	192.61	17,335
Minneapolis	351	1,255.68	439,487
Thief River Falls Area	256	11.09	2,849
Duluth	100	107.56	10,756

## 2.0 EXECUTIVE SUMMARY AND RESEARCH HIGHLIGHTS

### 2.1 EXECUTIVE SUMMARY

The Northern Tier States of Alaska, Washington, Oregon, Idaho, Montana, North Dakota, South Dakota, and Minnesota will play a significant role in tourism of the Western and Northern Canadian provinces and territories. The overall market potential for these states represents nearly 1.4 million households. It is important to understand that while this area as a whole is extremely significant, each of the states relate to the Canadian provinces and territories somewhat differently. There is a direct relationship to their awareness and image of each of the Western and Northern provinces and territories based on their proximity geographically to that destination.

Overall, these respondents associate Western/Northern Canada with mostly outdoor, clean and safe travel products. Travellers from the Northern Tier States often feel that Canada is a place they can visit to learn new things, that it is a destination which is good for the entire family, the people are friendly, they take good care of their environment, and it is a safe destination. There is a strong association with the Western/Northern provinces and territories for national parks and forests, wildlife and wilderness, outdoor activities such as biking and hiking, and camping. Nevertheless, there are specific sub-segments of the Northern Tier States travellers who place less association on some of the travel products such as rest and relaxation, safety and security, and national parks and forests. Overall, awareness of, interest in, and likelihood to visit British Columbia are all significantly stronger than seen for any of the other provinces or territories. Due to this, most travellers were not only able to name more British Columbia destinations, but were more likely to associate many of the travel products and benefits with British Columbia.

British Columbia also benefits strongly from the high percentage (41%) of these travellers who reside in Washington State. The likelihood to visit the various provinces and territories correlates directly with the origin of the traveller. Western provinces (B.C./Alberta) are likely to see greater interest in visitation from Washington, Oregon, Idaho and Montana, while the Prairie Provinces (Manitoba/Saskatchewan) are more likely to see visitation from the Dakotas and Minnesota. Both territories show a higher visitation of residents of Alaska, particularly for the Yukon.

When Northern Tier State travellers are asked to think of the importance of travel products and benefits, overall the most important travel product or benefit sought by these travellers is a place that takes good care of its environment, followed closely by a place for rest and relaxation, a place they feel safe and secure, and a place where they can learn and increase their knowledge. With the exception of a place good for rest and relaxation, over half of these travellers associate Western/Northern Canada with each of those travel products and benefits.

A typical trip from the Northern Tier States to Western/Northern Canada is most likely because the traveller has been to the destination before, or that they are going to visit friends or relatives. Those two trip types account for nearly half of all trips to Western/Northern Canada from the Northern Tier States. Nearly two-thirds of these travellers will drive across the border, most will do some sightseeing in the cities, dine out, see the countryside, and shop.

Seven holistic segments can be profiled in the Northern Tier States. Three of these are interested in outdoor products: Explorers (12% of population, 25% of trips to Western/Northern Canada), High Life Enthusiasts (14% of population, 12% of Western/Northern Canada trips), and Safe & Familiar (19% of population, 8% of Western/Northern Canada trips). Two segments are luxury oriented: Pampered Planners (15% of population, 15% of Western/Northern Canada trips) and Luxury Entertainment Seekers (14% of population, 15% of Western/Northern Canada trips). The Heritage segment makes up 12% of the population and 14% of the Western/Northern Canada trips, while the Field & Stream segment accounts for 14% of the population and 12% of the Western/Northern Canada trips.

## **2.2 RESEARCH HIGHLIGHTS**

The research highlights outlined below are organized into seven sub-sections, following the structure of the main report:

1. The potential of vacation or pleasure travel to Western/Northern Canada;
2. The profile of Northern Tier States travellers;
3. Travel products and benefits sought;
4. Travel planning for trips to Western/Northern Canada;
5. The current competitive situation for Western/Northern Canada;
6. The economic attitudes effecting travel;
7. The segmentation of Northern Tier States travellers.

### **Potential of Vacation/Pleasure Travel**

1. Two states, Washington and Minnesota, account for over 68% of all the population with household incomes over \$30,000 annually. Residents of Washington represent 37% of that population, while residents of Minnesota account for 31%. Oregon residents account for an additional 20%, while the Dakotas and Alaska each represent 4%, and Idaho and Montana each represent 2%.
2. The incidence of travel among that population differs significantly across the states. The highest incidence of travel is seen in the state of Alaska, where 78% of higher income households have taken a trip outside of their state in the past two years or plan to do so in the next two years. Washington State residents follow with a 76% incidence, Minnesotans at a 75% incidence, and Oregon at a 72% incidence. Lower incidence rates are seen in Idaho (71%), the Dakotas (65%), and Montana (64%). Because of this difference in incidence, the percentage of actual travelling households by state differs slightly. When looking at travelling households, the State of Alaska becomes a larger potential market than North and South Dakota combined.
3. While Washington State residents make up 37% of the population and 36% of all trips taken by that population, they generate 62% of the trips going into Western/ Northern Canada from the Northern Tier States.

4. When Northern Tier State travellers think of Western/Northern Canada they are most likely to think of Vancouver, Victoria, Banff/Lake Louise, or Calgary. Likelihood of the recall of a destination increases dramatically among travellers who have recently visited that area. For British Columbia, 69% of travellers mention a destination in British Columbia, however, this increases to 91% among recent B.C. travellers. The same holds true for all of the other provinces and territories.
5. The likely visitation of travellers is related to the proximity of the state to the province or territory. Travellers from Washington are more likely to visit B.C., travellers from Montana are more likely to visit Alberta or Saskatchewan, travellers from the Dakotas are more likely to visit Manitoba or Saskatchewan, and Minnesotans are more likely to visit Manitoba than are residents of other Northern Tier States.

### **Profile of Northern Tier State Travellers**

6. Demographically, travellers living in the Northern Tier States are well educated, often residing and travelling as a couple when visiting Western/Northern Canada, are under the age of 44, and have fairly high levels of education. Sixty-two percent of this travelling population is under the age of 45, 72% are married or living with someone, 44% of those have children in the household, 41% graduated from a college or university, and 69% earn over \$40,000 per year.
7. When these travellers go out of state, they are most likely to be visiting either another Northern Tier State or a Western U.S. state. Five percent of their most recent trips were to Western/Northern Canada. Overall, out of state trips tend to average 8.4 nights, with 7.7 of those nights spent outside of their state. Trips to Western/Northern Canada average 4.9 nights.

### **Travel Products and Benefits Sought**

8. The key products and benefits travellers feel are important when choosing a vacation destination are a place that takes good care of its environment, rest and relaxation, a place where they feel safe and secure, and the opportunity to learn new things or increase their knowledge.

9. Other areas which are also important to more than three-quarters of these travellers are national parks and forests, visiting historic sites of interest, a chance to see wildlife and undisturbed nature, visiting friends and relatives, lakeside resorts, and places which are good for the entire family.

#### **Travel Planning for Trips to Western/Northern Canada**

10. The majority of these travellers do use at least one source of information when planning their trip to Western/Northern Canada. One-third of these travellers spoke with either friends or family prior to their trip. One-quarter referred to a travel guide or brochure. Fewer than 15% had read articles in magazines and newspapers, while 12% contacted a Government Tourist Board, 11% call an 800 number or had seen advertising, 10% went to AAA, and 6% used a travel agent.
11. The typical trip from the Northern Tier States to Western/Northern Canada requires less than two months of travel planning with the majority of that taking place within one month of the trip. Travel tends to be seasonal with nearly half of the trips taking place between June and August, and 25% taking place between September and November. Party composition is typically two adults travelling without children and using a private vehicle to cross the border.

#### **The Current Competitive Situation For Western/Northern Canada**

12. The main reason travellers choose Western/Northern Canada for their trip was either because they had been there before (27%) or to visit friends and relatives (22%). Twelve percent of these travellers went to Western/Northern Canada because they had never gone there before, 10% went for a special event such as a theatre or sporting event, 8% participated in an outdoor activity as their main reason for visiting, 5% went to view the nature and scenery, 4% purchased a good package, 3% were on personal added on to a business trip, 3% went for rest and relaxation, and 2% went because they had seen an advertisement.

13. While visiting Western/Northern Canada over one-quarter of the travellers went sightseeing in the city while approximately 15% dined out, went sightseeing in the countryside, or went shopping.
14. Comparing travellers to Western/Northern Canada to the travelling population of the Northern Tier States shows that Western and Northern Canadian travellers are more likely to place a higher level of importance on getting to know the local people, museums and art galleries, and going to a frontier few people have visited. These travellers are slightly less interested in going to a place that is good for the entire family.
15. Travellers are likely to associate all of the Canadian provinces and territories with the ability to learn new things, a good place for the family, friendly people, camping, a place that takes good care of the environment, wilderness and wildlife, safety and security, national parks and forests, and outdoor activities such as hiking and biking.
16. Advertising awareness for British Columbia is extremely high at 70%, followed by Alberta at 48%. Manitoba's and Saskatchewan's advertising awareness ranges from 26% for Saskatchewan and 33% for Manitoba, while both the Yukon and Northwest Territories show approximately 20% ad recall.

**Economic Attitudes Affecting Travel**

17. Overall, travellers have a fairly optimistic outlook for their economic situation next year, with only 4% feeling the situation will be worse, while 47% feel it will stay the same, and 48% feel it will improve.
18. Nearly 40% of travellers feel that tourist services available in Canada will be more expensive than the same tourist services found in the United States. Only 10% felt those services would be less expensive in Canada.

### Segmentation of Northern Tier State Travellers

The population of the Northern Tier States can be segmented into seven distinct holistic segments.

Of these, the most important to Western/Northern Canada is that of the Explorers. Explorers account for only 14% of Northern Tier States travelling population, however they generate 25% of trips to Western/Northern Canada. Explorers are extremely interested in the outdoor activities such as climbing, hiking, biking, camping, and viewing wildlife and undisturbed nature.

At the high-end of the outdoors product is the High Life Enthusiasts. This segment is also interested in camping and wilderness adventure, however, they are different from the Explorer segment in that they are seeking the luxury activities and enjoy a social atmosphere, and like being in style. They account for 14% of Northern Tier State travelling households and generate 13% of the trips to Western/Northern Canada.

A third segment which has a strong preference for camping type vacations is that of the Safe and Familiar. They differ from the other two outdoor based segments by being extremely interested in family activities, and avoid active outdoor products which involve any type of risk such as skiing or visiting a frontier. This segment makes up 19% of Northern Tier State travelling households, but only 8% of trips to Western/Northern Canada. They are most likely to be married with children and visiting places they have been to before.

There are two luxury or pampered segments. The Pampered Planners will pay for luxury, however this group is not spontaneous, will use a travel agent, and buy guided tours or vacation packages. They enjoy the top end resort areas, places they can shop, or stay in Bed and Breakfasts. They are 15% of Northern Tier State travelling households and 15% of trips to Western/Northern Canada.

The Luxury Entertainment Seekers, however, are much more interested in being in style and being entertained. Their products also centre around shopping and resorts, however Luxury Entertainment Seekers are interested in gambling, golf and entertainment special events. This segment accounts for 14% of Northern Tier State travelling households and generate 15% of trips to Western/Northern Canada.



The Heritage segment consists of travellers who are interested in historic sites, museums and art galleries, and local festivals and crafts. They are the oldest of the segments and prefer to do the non-active type of travel products. This segment is the most sensitive to price value, and maybe more effected by the current exchange rate situation than the other segments. They are 12% of Northern Tier State travelling households, but make-up 14% of trips to Western/Northern Canada.

The most unique and distinct of the segments is the Field and Stream segment. This segment consists mainly of hunters and fishermen, they are very independent travellers, prefer to take short trips, and tend to have greater visitation to Manitoba and Saskatchewan. They are 14% of Northern Tier State travelling households and 12% of trips to Western/Northern Canada.

## 3.0 POTENTIAL OF VACATION/PLEASURE TRAVEL

### 3.1 MARKET SIZES

The largest of the states analyzed in this study is Washington State. The households represented from Washington State include those located in the MSAs of Seattle/Tacoma and Spokane, for a total representation of 726,000 households. Residents of the Seattle MSA make up nearly 92% of the inhabitants of Washington State included in this survey (665,400). The remaining 61,000 reside in Spokane.

Minnesota is the second largest state included in the survey representing 603,000 households. Similar to Washington State, one MSA (Minneapolis) accounts for the largest proportion of Minnesota residents. Over 96% of Minnesota residents included in this survey reside in the Minneapolis MSA. Two other Minnesota MSAs were included, Duluth (17,100) and the Thief River Falls area (6,100).

Oregon is the third largest Northern Tier State with nearly 400,000 households represented in this survey. The majority of those are in the Portland/Salem area (351,900). The Dakotas, at 77,700 households, and Alaska at 71,000 households are the next largest of the states. Residents of the Dakotas are spread across four different cities, the largest of which is Fargo at 25,500, followed closely behind by Sioux Falls at 24,800. Grand Forks (14,800) and Rapid City (12,600) are half the size of the other two Dakota cities. In Alaska, Anchorage dominates with 56,600 households and Juneau and Fairbanks both represent approximately 7,000 households.

Idaho and Montana were the smallest of the states included, with residents of Idaho representing 46,200 households and those in Montana representing 31,000 households. In Idaho, the Boise/Caldwell area represents nearly 31,000 households while the Pocatello/Idaho Falls area represents slightly over 15,000 households. MSAs included from Montana were Billings (19,400), and Great Falls (11,600).

## MARKET SIZE

<b>MSA SAMPLING POINT</b>	<b>Actual Popn of HH with \$30K+ income*</b>	<b>Incidence of Travel (% travelling H.H.)</b>	<b>Market Potential Size</b>
<b>TOTAL</b>	<b>1,953,600</b>	<b>74.3</b>	<b>1,451,742</b>
<b>WASHINGTON</b>	<b>726,400</b>	<b>76.0</b>	<b>552,379</b>
Seattle	665,400	76.9	511,692
Spokane	61,000	66.7	40,687
<b>MINNESOTA</b>	<b>603,000</b>	<b>75.1</b>	<b>453,093</b>
Minneapolis	579,800	75.8	439,488
Duluth	17,100	62.9	10,756
Thief River Falls	6,100	46.7	2,849
<b>OREGON</b>	<b>398,300</b>	<b>72.4</b>	<b>288,204</b>
Portland/Salem	351,900	73.5	258,647
Eugene/Springfield	46,400	63.7	29,557
<b>THE DAKOTAS</b>	<b>77,700</b>	<b>64.6</b>	<b>50,205</b>
Fargo	25,500	56.8	14,484
Sioux Falls	24,800	69.9	17,335
Grand Forks	14,800	67.1	9,931
Rapid City	12,600	67.1	8,455
<b>ALASKA</b>	<b>71,000</b>	<b>77.8</b>	<b>55,228</b>
Anchorage	56,600	80.0	45,280
Fairbanks	7,700	52.6	4,052
Juneau	6,700	88.0	5,896
<b>IDAHO</b>	<b>46,200</b>	<b>70.8</b>	<b>32,718</b>
Boise/Caldwell	30,900	73.5	22,712
Pocatello/Idaho Falls	15,300	65.4	10,006
<b>MONTANA</b>	<b>31,000</b>	<b>64.2</b>	<b>19,919</b>
Billings	19,400	66.2	12,843
Great Falls	11,600	61.0	7,076

\* 1990 U.S. Census

There are some important differences in the incidence of travelling households within those MSAs. The highest incidence of travel occurs in Alaska. Both Juneau and Anchorage have a high incidence of travelling outside of the state with over 80% of the households taking at least one trip outside of Alaska in the past two years. This results in an overall incidence for the State of Alaska of nearly 78%, significantly above the average for the Northern Tier States which is 74%.

N Washington State shows the next highest level of travel out of the state with 76% of their households having a resident who took such a trip. Incidence is significantly higher in Seattle (77%) than in Spokane (67%).

N Slightly over 75% of Minnesota residents travelled outside of their state in the past two years, with the highest incidence seen in Minneapolis (76%) and the lowest in the Thief River Falls area (47%).

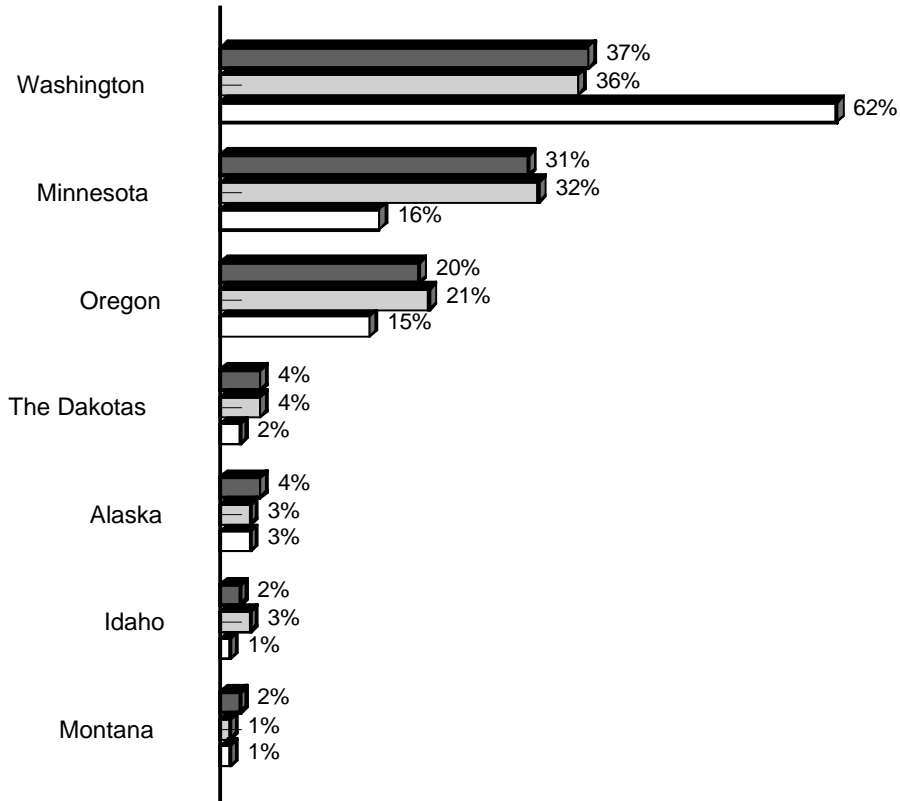
N In Oregon, 72% of households have travelled outside their state, with the Portland/Salem area showing a 74% level and the Eugene/Springfield area showing only 64%.

N Residents of Idaho travel outside of their state at a rate of approximately 71%. The Boise/Caldwell area is significantly more likely to be travelling (74%) than residents of the Pocatello/Idaho Falls area (65%).

N The Dakotas and Montana show significantly lower rates of travel than do the other states. In the Dakotas, 65% of residents have taken a trip out of their state, and in Montana only 64% have taken such a trip. Each of the cities in the Dakotas and Montana show approximately a 60% to 67% incidence of travel, with the lowest being Fargo at only 57%.

Because of the differences in incidence of travel, Alaska becomes a significantly more important potential market for targeting travellers overall than they are based solely on their population size. Washington State shows the largest market potential, followed by Minnesota, and Oregon. Alaska becomes the fourth largest state, becoming larger than the Dakotas as a market for potential travellers.

# PROPORTION OF TRAVEL by State of Origin



<b>Proportion Northern Tier Population</b>	<b>Proportion Out of State trips (past 2 years) (Q.4)</b>
<b>Proportion of Trips to West/North Canada (Q.21)</b>	

Population: N=1,451,742

Q.4: N=5,739,392 trips

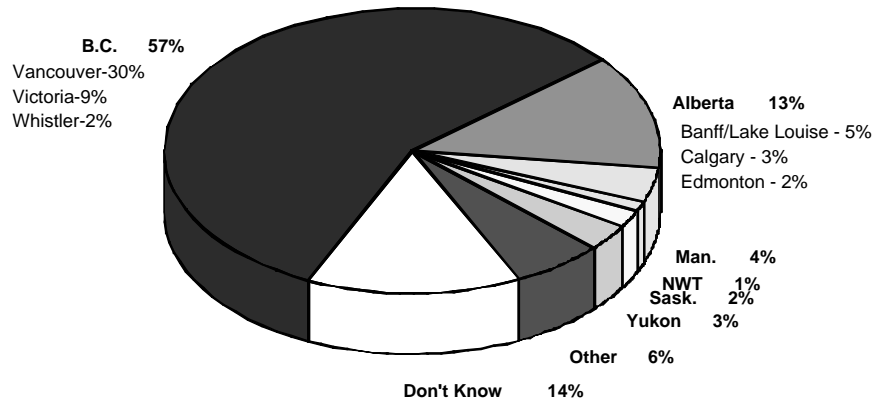
Q.21: N=781,231 trips

Although the incidence of travel differs across the various states, the proportion of trips taken is not significantly different from the proportion of their population. For example, while 37% of the Northern Tier population resides in Washington State, 36% of the out of state trips taken originated in Washington State. A similar relationship is seen in all the other states with the proportion of trips within 1% of the proportion of population.

Significant differences do occur, however, when the proportion of trips to Western and Northern Canada is considered. Residents of Washington State are the most likely to have taken a trip to Western or Northern Canada, and therefore the proportion of trips they represent from the Northern Tier States to Western/Northern Canada jumps to 62%, nearly twice the proportion of their population. The second largest state, Minnesota, accounts for 31% of the population of the Northern Tier States, 32% of out of state trips, but only 16% of trips to Western and Northern Canada.

- N Oregon residents represent 20% of the Northern Tier State population, 21% of trips generated by those residents, but only 15% of travel to Western and Northern Canada.
- N The proportion of trips to Western and Northern Canada is only 2% from residents of the Dakotas, 1% from Idaho, and 1% from Montana.
- N Alaska is the only state with no significant differences between their percentage of population, their percentage of trips, and the percentage of trips to Western and Northern Canada (3% - 4%).

**TOP OF MIND AWARENESS**  
**- Western/Northern Canada-**  
**(% First Mention)**



(Q.14a, N = 1,451,742)

Q.19	TOTAL MENTIONS	
	Unaided (3613)	Aided (3613)
<b>Unweighted Base:</b>		
<b>Weighted HH Base:</b>	<b>1,451,742</b> %	<b>1,451,742</b> %
B.C. (net)	<b>68</b>	<b>99</b>
Vancouver	45	N/A
Victoria	25	N/A
Whistler	5	
Alberta (net)	<b>32</b>	<b>97</b>
Banff/Lake Louise	14	N/A
Calgary	11	N/A
Edmonton	6	
Yukon (net)	<b>9</b>	<b>96</b>
Manitoba (net)	<b>9</b>	<b>89</b>
Winnipeg	4	N/A
Saskatchewan (net)	<b>5</b>	<b>95</b>
NWT (net)	<b>4</b>	<b>87</b>

### **3.2 AWARENESS OF WESTERN/NORTHERN CANADA DESTINATIONS**

When travellers from the Northern Tier States were asked to think about Western and Northern Canada specifically, and asked to name the places that came to mind, Vancouver is the most frequently mentioned destination with almost half (45%) mentioning Vancouver on an unaided basis.

Victoria is the second most mentioned city with 9% top-of-mind (first mentioned) awareness and 25% total unaided awareness. Banff/Lake Louise follows with a 5% top-of-mind awareness and 14% unaided awareness.

N While Calgary and Edmonton receive 3% and 2% respectively of the top-of-mind awareness, Calgary shows a strength in unaided awareness over Edmonton with 11% total unaided awareness while Edmonton is at only 6%.

British Columbia (69%) receives over twice the unaided mentions as Alberta (32%), with less than one in ten mentioning any other province or territory spontaneously.

N Nine percent of the respondents mention a destination in either the Yukon or Manitoba. Saskatchewan destinations were mentioned by 5% while the Northwest Territories was mentioned by 4%.

N Fourteen percent of the respondents were unable to mention any specific destination in Western or Northern Canada.

On an aided basis, nearly all of these travellers had heard of each of the provinces and territories. The weakest levels of awareness were for the Northwest Territories (87%) and Manitoba (89%).



## SPECIFIC DESTINATIONS RECALLED

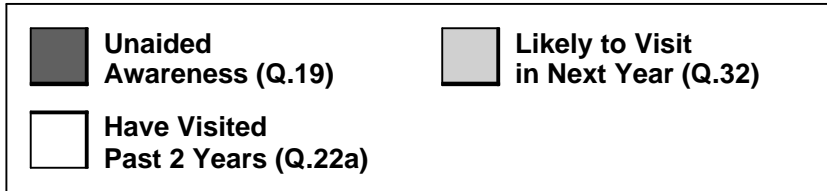
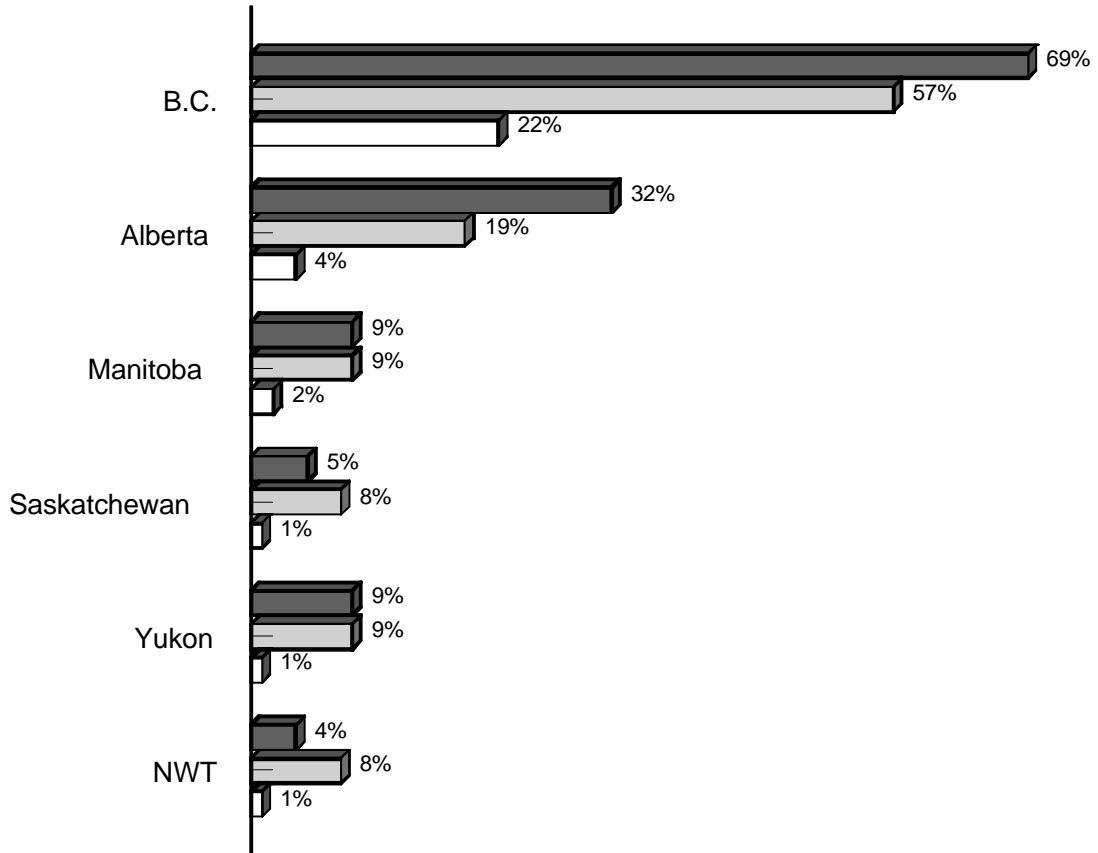
UNAIDED AWARENESS	TOTAL MENTIONS	
	Total Travellers	Mention by Traveller to that Province/Territory in Past 2 Years
	(3613)	Base different for each (%)
Weighted HH Base:	(1,451,742) %	
<b>British Columbia</b>	<b>69</b>	(324,878) (573) <b>91</b>
Vancouver	45	59
Victoria	25	43
Whistler	5	14
General	36	41
<b>Alberta</b>	<b>32</b>	(57,019) (250) <b>60</b>
Banff	14	21
Calgary	11	34
Edmonton	6	16
Jasper	2	7
General	12	26
<b>Yukon</b>	<b>9</b>	(17,376) (166) <b>65</b>
Dawson City	1	20
Whitehorse	2	25
General	8	43
<b>Manitoba</b>	<b>9</b>	(30,632) (166) <b>37</b>
Winnipeg	5	12
General	4	25
<b>Saskatchewan</b>	<b>5</b>	(21,206) (77) <b>23</b>
General	4	23
<b>Northwest Territories</b>	<b>4</b>	(14,329) (50) <b>13</b>

General	4	13
---------	---	----

Recent travellers to each of the destinations were significantly more likely to mention a destination in that province or territory than total travellers. For example, among all travellers, 69% mentioned a British Columbia destination, however, this increases to nearly 91% among travellers who have visited British Columbia in the past two years. Similar trends are seen in Alberta where mentions increase from 32% to 60% among recent travellers.

This is even more important for the lessor mentioned destinations. For the Yukon, while general awareness is at 9%, specific recall of destinations in the Yukon jumps significantly up to 65% among those visiting the Yukon in the past two years. To a lesser extent, the same is true for Manitoba with mentions jumping from 9% to 37% for those visiting the province in the past two years. Saskatchewan mentions increased from 5% to 23% among two year travellers, and specific Northwest Territories mentions increased from 4% in total to 13% among travellers visiting over the past two years.

# MARKET POTENTIAL OVERVIEW



(N = 1,451,742)

Overall market potential for each of the provinces from the Northern Tier States can be shown by examining the percentage of travellers who mentioned a destination within that province on an unaided basis versus the percentage of travellers who said they were definitely, very, or somewhat likely to visit that province in the next year, and the percentage of those who have visited that province in the past two years.

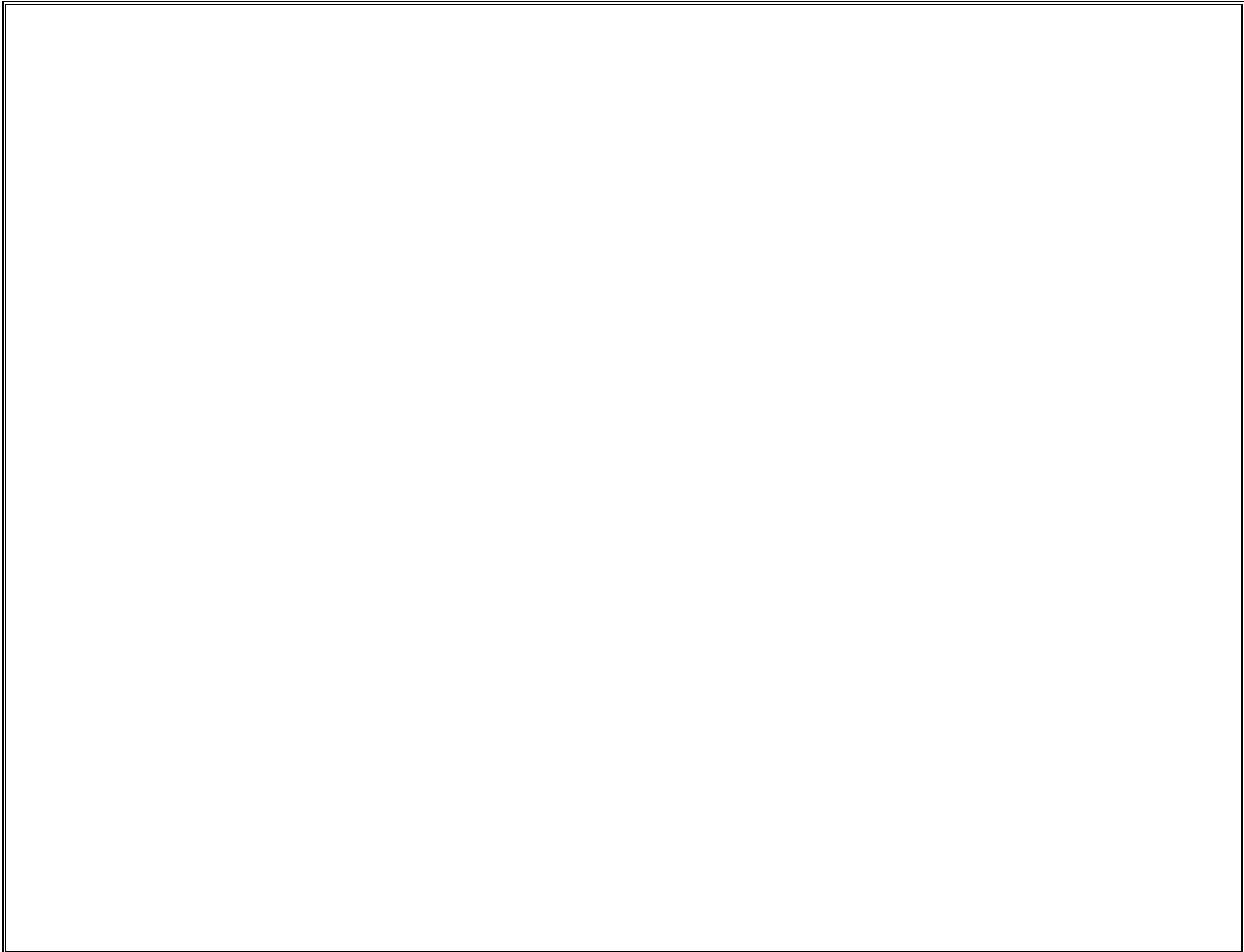
British Columbia has the highest levels of awareness, likelihood to visit, and actual visitation, compared to the other provinces and territories and, therefore, the greatest levels of market potential. Two out of three travellers (69%) recalled a specific destination in British Columbia when thinking of Western/Northern Canada. Over half of the travellers said that they would be definitely, very, or somewhat likely to visit British Columbia, and nearly one-quarter had already visited British Columbia in the past two years.

N Awareness of Alberta is slightly under half that seen for British Columbia (32%), while likelihood to visit Alberta is only one-third the level seen for British Columbia (19%), and actual visitation is less than one-fifth of the British Columbia levels (4%).

N For both British Columbia and Alberta, the relationship between awareness and likelihood to visit is fairly strong. For British Columbia, 83% of the travellers who think of destinations in British Columbia say they are likely to visit British Columbia in the next year. This is similar, but weaker in Alberta where nearly 60% who are aware of a destination are also likely to visit. (This is calculated by dividing the percent likely to visit in next year by 'unaided awareness')

Unaided recall of destinations in either Manitoba or the Yukon were made by 9% of travellers. While awareness and likelihood to visit for these two provinces are both at 9%, actual visitation for both destinations is extremely low (2% for Manitoba and 1% for the Yukon).

Both Saskatchewan and the Northwest Territories show a higher percentage of travellers who are likely to visit than were able to name any destinations on an unaided basis. This would indicate that when prompted specifically for Saskatchewan or the Northwest Territories, travellers show interest, although current levels of specific unaided awareness are extremely low.



Breaking down likelihood of visitation to Western/Northern Canada by household in each of the states shows that the highest concentration of travellers who are interested in visiting Western/Northern Canada are located in Washington State. Seventy percent of travellers residing in Washington State are extremely, very, or somewhat interested in taking a trip to Western/Northern Canada in the next year.

N Nearly as high rates can be seen in Oregon, where 68% of travellers are interested visiting Western/Northern Canada, Montana, where 67% are interested in travelling to Canada, and Idaho and Alaska each showing 61% of travellers interested in a trip to Western/Northern Canada.

N Considerably lower rates of interest are seen as you move east across the Northern Tier States. In North and South Dakota only 47% of travellers are interested in visiting Western/Northern Canada in the next year. It is only slightly higher in Minnesota, where 49% of travellers are likely to take such a trip.

**LIKELIHOOD OF VISITING WESTERN/NORTHERN DESTINATIONS  
BY STATE OF ORIGIN  
(% Definitely/Very/Somewhat Likely)**

Likely to Visit in Next Year Q.32	TOTAL	ORIGIN OF TRAVELLERS						
		Alaska	Washington	Oregon	Idaho	Montana	Dakotas	Minnesota
<b>Unweighted Base:</b>	<b>(2255)</b>	<b>(392)</b>	<b>(448)</b>	<b>(333)</b>	<b>(245)</b>	<b>(312)</b>	<b>(144)</b>	<b>(381)</b>
<b>Weighted HH Base:</b>	<b>900,571 %</b>	<b>33,613 %</b>	<b>389,910 %</b>	<b>196,373 %</b>	<b>19,972 %</b>	<b>13,418 %</b>	<b>23,633 %</b>	<b>223,654 %</b>
British Columbia	58	47	<b>80</b>	61	45	<u>35</u>	<u>13</u>	<u>23</u>
Alberta	21	21	24	18	25	<b>52</b>	<u>12</u>	13
Manitoba	9	6	5	5	5	12	<b>40</b>	<b>18</b>
Saskatchewan	9	7	7	5	5	<b>23</b>	<b>13</b>	12
Yukon	8	<b>48</b>	10	7	8	5	5	5
Northwest Territories	8	<b>22</b>	10	9	9	10	9	4

*Bold # = significantly above average*

*# = significantly below average*

*\* = less than 1%*

The likelihood of visiting different provinces or territories varies considerably by state of origin. In many respects, the findings confirm the "*accepted wisdom*" that travellers from states directly adjacent to a Canadian destination are more likely to visit that destination than travellers from more distant states.

N Residents of Washington State are much more likely to visit British Columbia (80%) than travellers from other states.

N Residents of Oregon exhibit a similar pattern of likely visitation with a strong likelihood to visit British Columbia (61%).

N Moving east, residents of Idaho are slightly less likely than residents of Washington or Oregon to visit British Columbia (45%), however, they are more likely to visit Alberta (25%) than travellers from most states.

N Montana residents are most likely to visit Alberta (52%) followed by British Columbia (35%). They also have a higher likelihood of visiting Saskatchewan (23%) than travellers from other states.

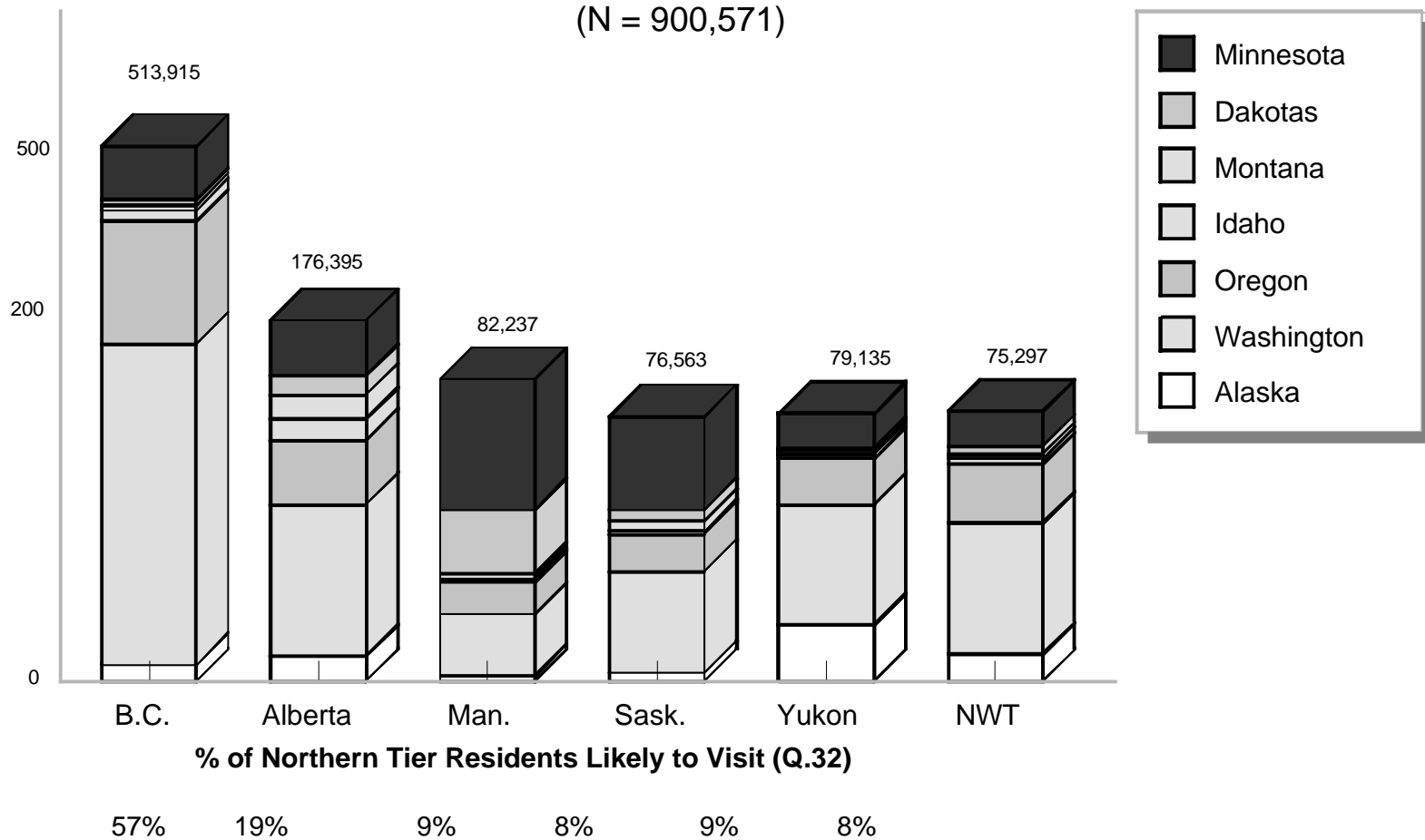
N Further east, residents of the Dakotas are much more likely to want to travel to Manitoba (40%) and Saskatchewan (13%) than are residents of the other states.

N Minnesota residents show lower interest in visiting Western/Northern Canada than travellers from the other states. Only 34% of Minnesotans are likely to visit British Columbia, 18% are likely to visit Manitoba, 12% to 13% are likely to visit Alberta or Saskatchewan, and only 4% to 5% are likely to visit either of the territories.



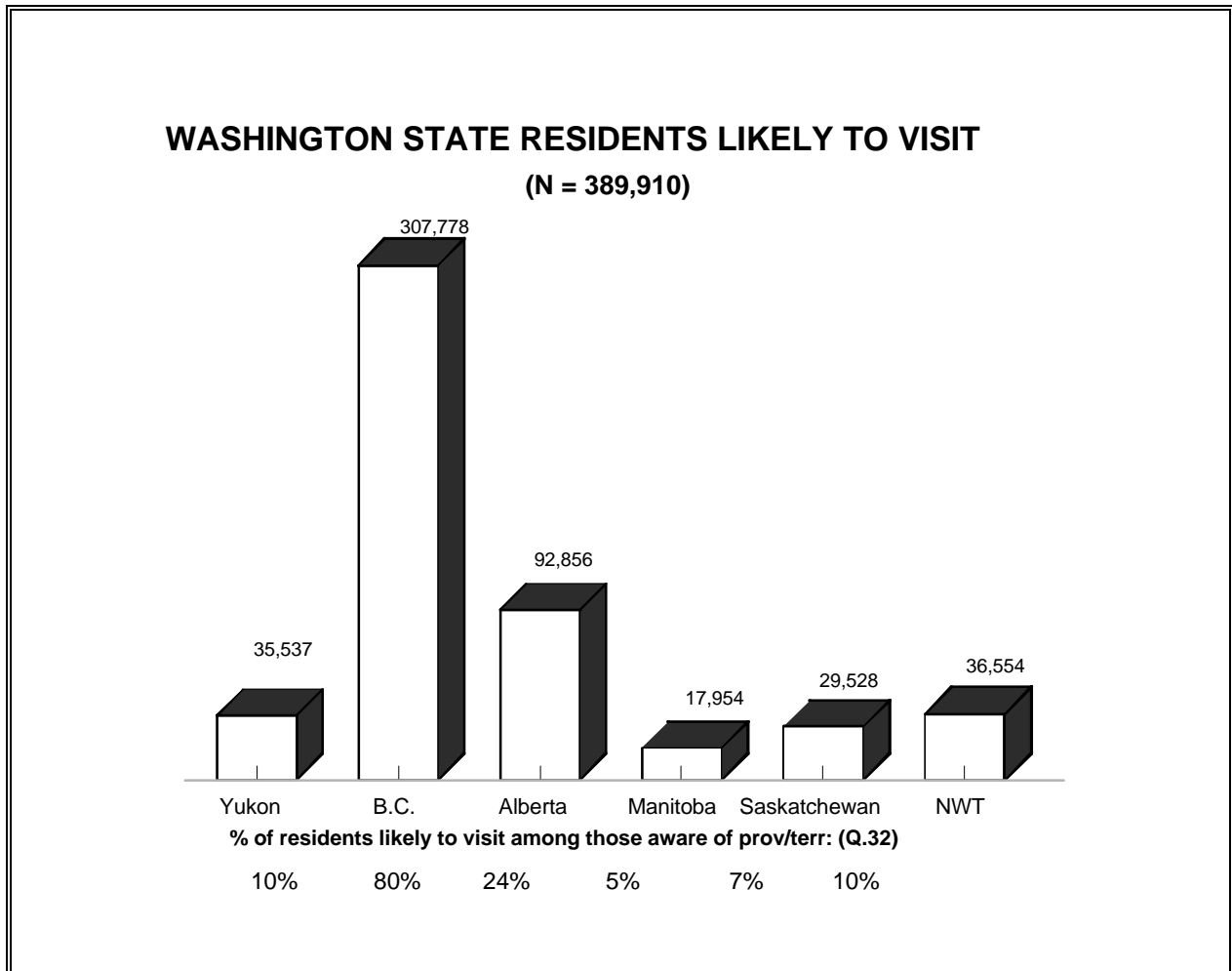
# CUMULATIVE ORIGIN OF POTENTIAL TRAVELLERS

Projected # of Households in Northern Tier MSAs Likely to Visit  
(N = 900,571)



The potential market for attracting travellers to Western/Northern Canadian provinces can be further examined in terms of the number of households who expressed an interest in visiting each destination. The graphs which follow show the level of interest in each province/territory by state of origin.

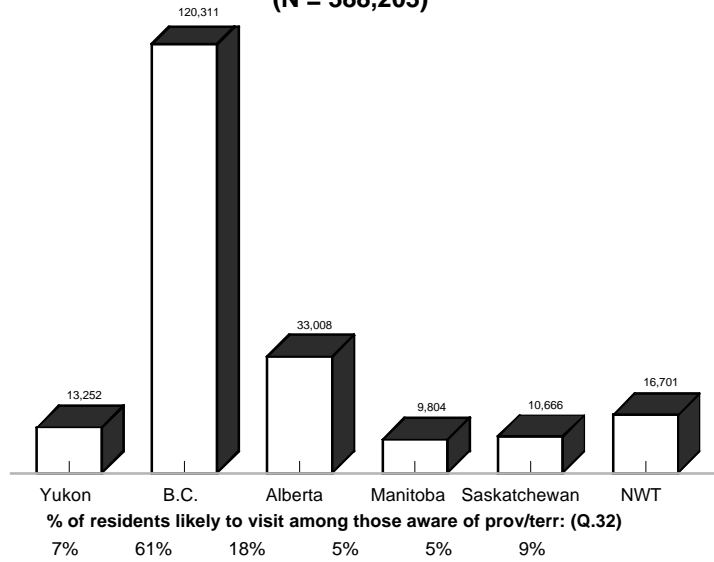
- N For *British Columbia*, the cumulative market potential is nearly 514,000 households. Washington accounts for the majority (60%) of those households, but nearly one-quarter are from Oregon, while 10% are from Minnesota. Residents of Idaho, Montana and the Dakotas combined account for only 4% of likely travellers to British Columbia. Three percent is accounted for by residents of Alaska.
- N *Alberta* is likely to see approximately one-third of the level of visitation as British Columbia, with a market potential size of slightly over 176,000 households. The distribution of those households shows slightly over half coming from Washington State (52%), 19% coming from Oregon, and 16% from Minnesota. Four percent each come from Montana and Alaska, only 3% from Idaho, and 2% from the Dakotas.
- N A total of 82,000 households say they are likely to visit *Manitoba*, with nearly half of those living in Minnesota. Washington State residents account for approximately one-quarter of likely Manitoba travellers, while the Dakotas and Oregon each generate approximately 12%. Montana, Idaho, and Alaska residents generate the remaining 5% of likely Manitoba travellers.
- N Approximately 76,500 households are likely to travel to the province of *Saskatchewan*. Of those, slightly over one-third will come from Washington State, while another one-third will come from Minnesota. Oregon residents generate 14% of likely Saskatchewan travellers while the Dakotas, Montana, Alaska and Idaho account for less than 4%.
- N Nearly 80,000 households are likely to visit the *Yukon* in the next 12 months. While Washington State accounts for 45% of that travel, residents of Alaska account for nearly one-quarter, considerably higher than seen for any of the other Western/Northern provinces and territories, as would be expected due to the proximity of Alaska to the Yukon. Oregon residents account for approximately 17% of likely Yukon travellers, while Minnesota residents make up an additional 13%. The Dakotas, Montana, and Idaho residents each account for less than 2% of likely travellers to the Yukon.
- N The *Northwest Territories* are a likely destination for nearly 75,000 households. Half of these households are from Washington State, 22% from Oregon, 13% Minnesotans, and



10% Alaskans. The Dakotas, Montana and Idaho each make up less than 3%. It should be noted that the Northwest Territories draws much fewer likely travellers from the State of Alaska than the Yukon.

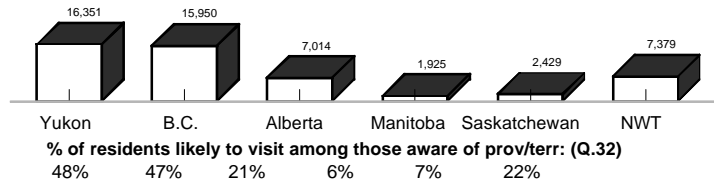
### OREGON RESIDENTS LIKELY TO VISIT

(N = 388,203)

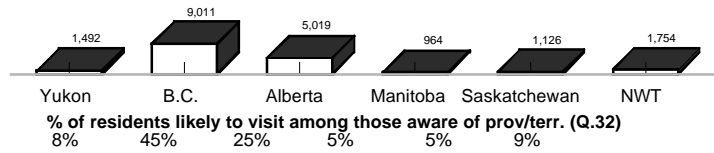


### ALASKA RESIDENTS LIKELY TO VISIT

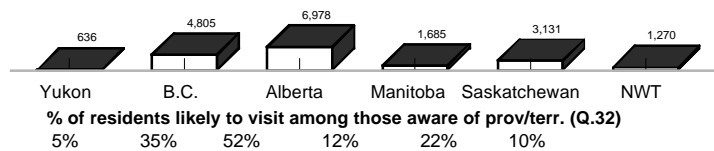
(N = 55,228)



**IDAHO RESIDENTS LIKELY TO VISIT**  
(N = 32,718)

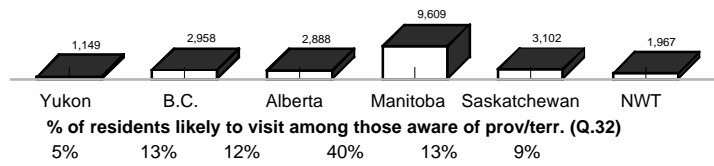


**MONTANA RESIDENTS LIKELY TO VISIT**  
(N = 19,919)



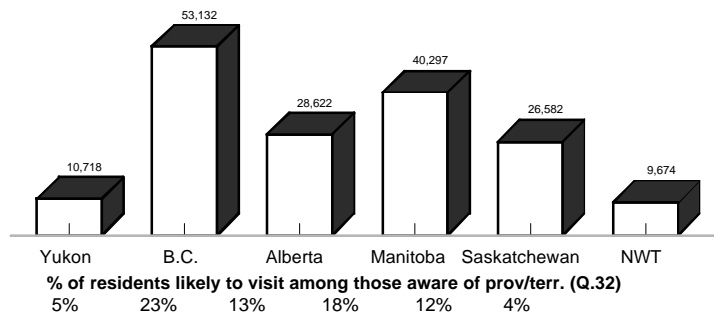
### DAKOTA RESIDENTS LIKELY TO VISIT

(N = 50,205)



### MINNESOTA RESIDENTS LIKELY TO VISIT

(N = 453,092)



Washington State generates the largest number of households likely to visit the Yukon, British Columbia, Alberta, and Northwest Territories due to the large population base and the high incidence of travel among residents of Washington. Minnesota is as important to Manitoba and Saskatchewan as Washington State residents are to other provinces and territories.

N Washington State could generate over 300,000 households visiting British Columbia, over 92,000 households visiting Alberta, nearly 36,000 households visiting the Yukon, and approximately 37,000 visiting the Northwest Territories.

N The highest proportion of potential travellers to Alberta are found in Montana, where 52% of Montana residents are likely to visit Alberta. However, they account for only 7,000 total households. Washington State has the greatest number of households likely to visit Alberta (92,856 households), however, that represents only 24% of the Washington travelling population.

N While 48% of Alaska residents are likely to visit the Yukon, they represent only 16,000 potential household travellers, while in Washington State only 10% are likely to visit the Yukon yet they account for nearly 36,000 households. Clearly this shows the trade-off in marketing efforts where in one situation the return on investment will be felt for nearly half the effort (Alaska), as it would in Washington State, which would have a likely rate of response of only 10%. A similar situation occurs for NWT where 22% of Alaska residents are likely to visit but those residents only account for nearly 7,400 households. Conversely, residents of Washington State who are interested in visiting the Northwest Territories represent nearly 37,000 households, but they are only 10% of the residents of Washington State.

N For Manitoba, 40% of the travellers from the Dakotas are likely to visit Manitoba, representing 9,600 households. More households are likely to visit Manitoba from Minnesota (40,297) even though that represents only 18% of Minnesota households, and also from Washington State, where nearly 18,000 households are likely to visit Manitoba although those households are only 5% of that state's population.

**PROFILE OF NORTHERN TIER STATE TRAVEL MARKET**  
By State of Origin

	TOTAL	STATE OF ORIGIN						
		Alaska	Washington	Oregon	Idaho	Montana	Dakotas	Minnesota
<b>Unweighted Base:</b>	<b>(3613)</b>	<b>(600)</b>	<b>(650)</b>	<b>(500)</b>	<b>(402)</b>	<b>(454)</b>	<b>(300)</b>	<b>(707)</b>
<b>Weighted HH Base:</b>	<b>1,451,742</b> %	<b>55,228</b> %	<b>552,379</b> %	<b>288,203</b> %	<b>32,718</b> %	<b>19,919</b> %	<b>50,205</b> %	<b>453,092</b> %
Age Q.37								
18 - 34	32	31	29	33	33	29	36	36
35 - 44	31	33	32	30	31	30	32	30
45 - 54	20	<b>25</b>	19	22	18	21	18	19
55+	17	<u>11</u>	19	15	19	20	13	15
Children in household Q.38								
0	55	53	<b>60</b>	54	51	<u>49</u>	<u>43</u>	53
1 - 2	34	37	30	36	32	<b>39</b>	<b>42</b>	34
3+	11	9	10	10	<b>17</b>	12	14	13
Marital Status Q.40								
Single	17	18	18	15	<u>11</u>	13	13	18
Married/living together	72	70	70	76	<b>79</b>	74	<b>77</b>	72
Divorced/widowed	10	12	11	10	10	11	11	10
Education Q.41								
High school	20	13	19	22	23	24	19	21
Technical school/some college	37	35	36	36	34	34	36	39
College (university)	30	31	30	31	28	27	32	27
Post graduate	13	<b>20</b>	13	10	15	13	12	12
Income Q.42								
\$30,000 - \$40,000	26	<u>18</u>	24	29	<b>32</b>	<b>37</b>	<b>36</b>	24
\$40,000 - \$60,000	39	<u>31</u>	38	40	35	32	39	40
\$60,000+	30	<b>47</b>	33	26	29	<u>22</u>	<u>22</u>	30
Refused	5	5	6	6	4	9	3	5

*Bold # = significantly above average*

*# = significantly below average*



*\* = less than 1%*

## 4.0 PROFILE OF NORTHERN TIER STATE TRAVELLERS

### 4.1 DEMOGRAPHIC PROFILE

The overall demographic profile of travellers in the Northern Tier States shows a fairly well educated, predominantly couple oriented travelling population. Over half (62%) are under the age of 44 (18 and 34 year olds representing 32% of the population, and 35 to 44 year olds representing 31%). Travellers aged 45 to 54 account for 20% of the travellers, while those 55+ account for 17%.

N The majority of households (55%) do not currently have any children. Those households with children are predominantly small, with just one or two children.

N Nearly three-quarters (72%) are married or living as a couple. Seventeen percent are single, while 10% are either divorced or widowed.

N Education levels are fairly high with at least 43% graduating from a university. Additionally, 37% graduated from a technical school or attended some college/ university.

N Household incomes tend to be over \$40,000 per year with 69% in that income range.

Comparing demographics across the states shows that residents of Alaska are the most highly educated of all the states, and are most likely to be earning over \$60,000 per year (47%).

N Residents of Washington State are the most likely to be living in households where there are no children present (60%), however their marital status is similar to other states.

N Residents of Idaho tend to have the largest household size with 17% having three or more children in the household. They also show the highest level of married households (79%), and one of the lowest average household incomes with 32% earning \$30,000 to \$40,000 per year.

N Residents of Montana and the Dakotas are very similar demographically. They are more likely to have households with children present than travellers from other states. Household incomes in Montana and the Dakotas are lower than seen in any of the other

states. Between 36% and 37% of the households earn under \$40,000, compared to an average of 25% seen across all the states and the low of 18% seen in Alaska.

**PROFILE OF NORTHERN TIER STATE TRAVEL MARKET**  
By Destination

	TOTAL	VISITED PAST 2 YEARS						
		Total W/N Canada	Alberta	B.C.	Man.	NWT*	Sask.	Yukon
<b>Unweighted Base:</b>	<b>(3613)</b>	<b>(901)</b>	<b>(250)</b>	<b>(573)</b>	<b>(168)</b>	<b>(50)</b>	<b>(77)</b>	<b>(166)</b>
<b>Weighted HH Base:</b>	<b>1,451,755</b> %	<b>374,168</b> %	<b>57,019</b> %	<b>324,878</b> %	<b>30,632</b> %	<b>14,329</b> %	<b>21,206</b> %	<b>17,376</b> %
<b>Age</b>								
18 - 34	32	<u>24</u>	<u>19</u>	24	<u>19</u>	19	26	29
35 - 44	31	29	28	29	28	29	29	21
45 - 54	20	24	<b>25</b>	24	<b>26</b>	<b>31</b>	<b>39</b>	19
55+	16	<b>23</b>	<b>28</b>	<b>23</b>	<b>26</b>	21	13	<b>31</b>
<b>Children in household</b>								
0	55	<b>67</b>	<b>67</b>	<b>68</b>	59	<b>82</b>	<b>72</b>	<b>73</b>
1 - 2	34	27	27	26	<b>37</b>	<u>18</u>	27	24
3+	11	6	6	6	4	*	1	2
<b>Marital Status</b>								
Single	17	17	19	16	16	<b>26</b>	<b>33</b>	<b>27</b>
Married/living together	72	70	63	71	67	48	44	56
Divorced/widowed	10	13	<b>18</b>	12	<b>17</b>	<b>26</b>	<b>23</b>	<b>17</b>
<b>Education</b>								
High school	20	13	<u>11</u>	<b>13</b>	<u>6</u>	<u>2</u>	<u>8</u>	17
Technical school/some college	37	31	<u>23</u>	30	34	41	<u>32</u>	<u>21</u>
College (university)	30	<b>35</b>	<b>41</b>	<b>37</b>	22	<b>41</b>	<b>36</b>	<b>35</b>
Post graduate	13	<b>19</b>	<b>25</b>	<b>18</b>	<b>38</b>	16	<b>23</b>	<b>27</b>
<b>Income</b>								
\$30,000 - \$40,000	26	19	29	<u>18</u>	<u>6</u>	<u>17</u>	26	<u>14</u>
\$40,000 - \$60,000	39	37	35	37	39	<b>44</b>	35	<b>55</b>
\$60,000+	30	<b>39</b>	33	<b>39</b>	<b>46</b>	<b>38</b>	27	30
Refused	5	6	3	6	10	*	12	2

*Bold # = significantly above average*

*# = significantly below average*

*\* = less than 1%*

## 4.2 DEMOGRAPHICS OF TRAVELLERS TO EACH PROVINCE/TERRITORY

Residents of the Northern Tier States who have taken a trip to one of the Western/Northern Canadian provinces or territories in the past two years tend to be somewhat older, with childless households, better educated, and earning higher household incomes than travellers who have not visited Western/Northern Canada. Childless couples, including "*empty nesters*", are over-represented among travellers to Western/Northern Canada. Over two-thirds of the households do not have children present (67%), only 6% have three or more children present and the vast majority are married (70%). Education is considerably higher than the average travelling population with 35% having completed college or university and 19% going on for a post-graduate degree. Consequently, income is higher than average with 39% of these households earning over \$60,000 (compared to 30% among total travellers).

- N Travellers to Alberta tend to be slightly older than those travelling to the other provinces, and show above average education levels.
- N British Columbia travellers are slightly younger travellers with only 23% over 55 years of age, with high education levels and high household income.
- N Travellers to Manitoba tend to be somewhat older, are the most likely to have children in the household, are the most educated travellers (38% have a post-graduate degree), and have the highest levels of household income (46% earn \$60,000+ annually).
- N Travellers to the Northwest Territories are more often 45 to 54 years old (31%), are the most likely not to have any children in the household (82% have no children), are more likely to be single or divorced (with only 48% married), tend to have technical school, college or graduate college (and have above average household incomes).
- N Saskatchewan travellers are the youngest travellers with only 13% over 55 years old. Seventy-two percent do not have children in the household and only 44% are married or living with someone. They have extremely high levels of education with 59% graduating college and/or post graduate degree levels, and have average income levels.
- N Yukon travellers are the oldest travellers to the Northern Tier States: 31% are over 55 years old. Three-quarters do not have any children in the household, and there are higher levels of single, divorced and widowed travellers to the Yukon. Education is above average, while income levels tend to be in the \$40,000 to \$60,000 range. Income levels for these

Yukon travellers would be expected to be somewhat lower because of the higher level of retirees.

**PRIMARY DESTINATION OF MOST RECENT TRIP**

<b>Q.15a</b>	<b>TRAVELLING HOUSEHOLDS</b>
<b>Unweighted Base:</b>	<b>(3100)</b>
<b>Weighted HH Base:</b>	<b>1,244,744</b> <b>%</b>
<b>Northern Tier States</b>	<b>32</b>
Minnesota	15
Oregon	7
Montana/Idaho	5
Washington	4
Alaska	1
<b>Western States</b>	<b>35</b>
California	13
Nevada	7
N. Mexico/Utah/Colorado	4
Arizona	4
Hawaii	4
Texas	2
Wyoming	1
<b>Southern States</b>	<b>13</b>
Florida	6
<b>Northeastern States</b>	<b>3</b>
<b>Mexico/Caribbean</b>	<b>7</b>
<b>Europe/Asia</b>	<b>4</b>
<b>Western/Northern Canada</b>	<b>5</b>
B.C.	3
Alberta	2
Other W/N Canada	*
<b>Other Canada</b>	<b>1</b>



### **4.3 PROFILE OF MOST RECENT TRIP**

Over three-quarters of travellers, when asked to detail the information on their most recent trip, said they travelled within the U.S.. Only 6% took a recent trip where the primary destination was Canada, approximately the same as Mexico, the Caribbean/South America (6%), while only a few (4%) went to Europe or Asia.

N States most frequently visited tend to be either Western U.S. states (35%) or other Northern Tier States (32%).

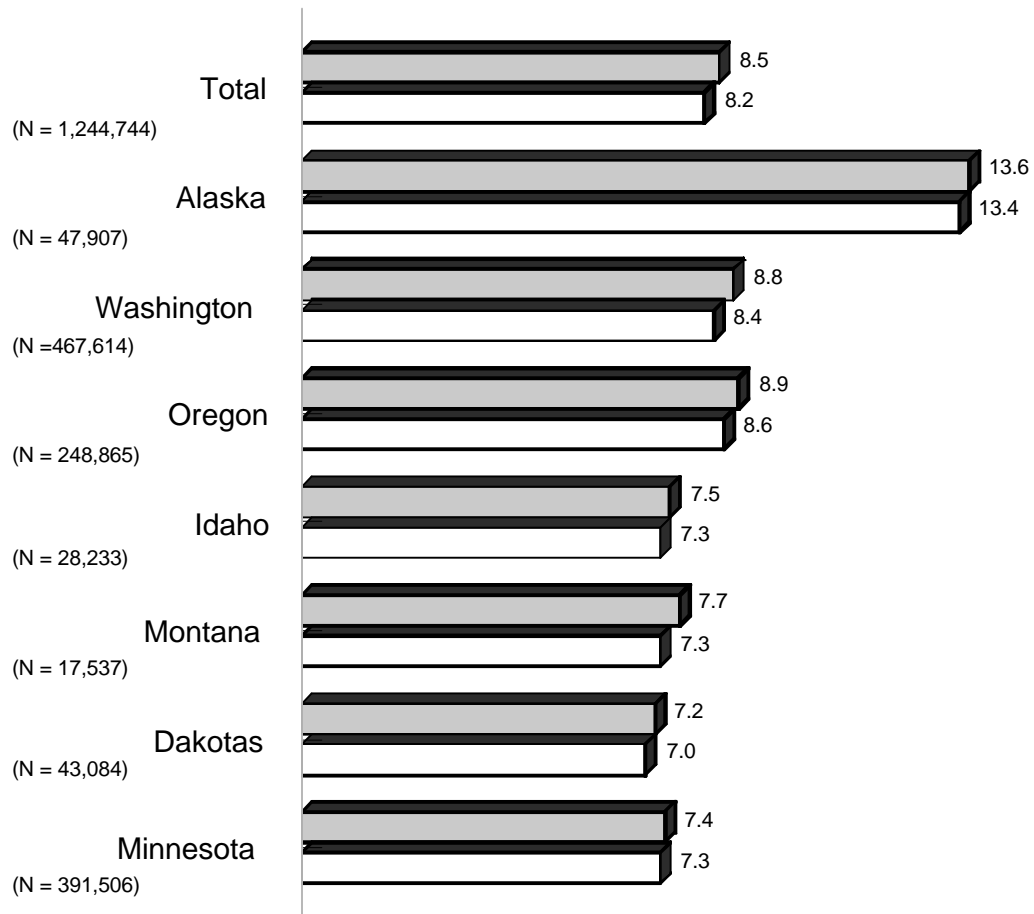
N Minnesota is one of the largest states attracting residents from Northern Tier States, with 15% of these travellers visiting Minnesota on their most recent trip. Surprisingly, Washington State is particularly low at only 4%, however, that is mainly due to the vast population of Washington State households travelling out of Washington State on this recent trip.

N California attracts 13% of these travellers, while Nevada accounts for 7%. States further from home, such as Southern states and Northeastern states, account for only 16% of these travellers' visits.

NOTE: Secondary destinations can be detailed in the data tables (Q.16)

## AVERAGE LENGTH OF MOST RECENT TRIP

Residents of:



 **Nights On Trip (Q.13a)**

 **Nights Out Of State (Q.13b)**

Trips taken by residents of the Northern Tier States average 8.5 nights in length, with 8.2 nights out of the state of origin.

Residents of Alaska take trips which tend to be approximately 4 to 5 nights longer than residents of other states. The typical Alaska resident will travel for a total of 14 nights on their out of state trips, and approximately 13 of those nights will be outside of the State of Alaska.

N Residents of Washington and Oregon average nearly 9 nights per out of state trip.

N Residents of the Dakotas tend to take the shortest trips on average, with the typical out of state trip lasting 7.2 nights. This increases to only 7.4 for Minnesota residents, 7.5 nights for Idaho residents, and 7.7 for those travellers living in Montana.

**TWO MAIN TYPES OF ACTIVITIES PARTICIPATED IN DURING RECENT TRIP**

Q.18	TOTAL	STATE OF ORIGIN						
		Alaska	Washington	Oregon	Idaho	Montana	Dakotas	Minnesota
<b>Unweighted Base:</b>	<b>(3100)</b>	<b>(522)</b>	<b>(550)</b>	<b>(432)</b>	<b>(350)</b>	<b>(392)</b>	<b>(258)</b>	<b>(596)</b>
<b>Weighted HH Base:</b>	<b>1,244.74</b> <b>4</b> <b>%</b>	<b>47,907</b> <b>%</b>	<b>467,614</b> <b>%</b>	<b>248,865</b> <b>%</b>	<b>28,233</b> <b>%</b>	<b>17,537</b> <b>%</b>	<b>43,084</b> <b>%</b>	<b>391,506</b> <b>%</b>
Sightseeing in cities	15	18	16	17	12	<u>10</u>	12	13
Sightseeing in the countryside	13	9	11	13	16	13	11	<b>16</b>
Shopping	12	17	11	13	17	16	16	12
Visiting friends or relatives	12	13	11	14	10	12	13	10
Swimming	11	10	8	9	5	6	8	13
Dining out in restaurants	10	8	12	9	12	12	9	10
Rest & relaxation	9	10	10	11	6	<u>5</u>	9	7
Amusement or theme parks	9	6	8	10	10	12	10	10
Climbing/hiking	9	8	9	9	9	6	7	8
Gaming or gambling	8	4	10	10	7	6	4	4

*Bold # = significantly above average*

*# = significantly below average*

*\* = less than 1%*

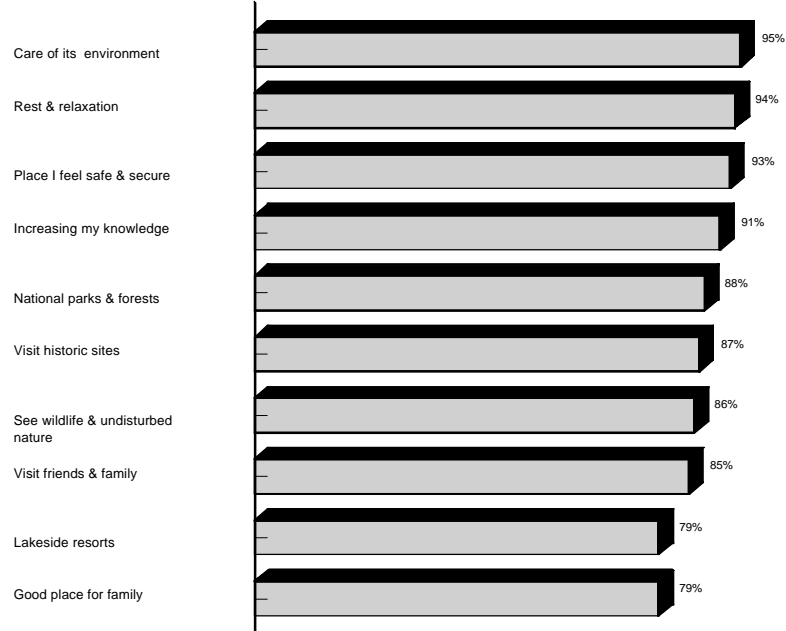
Travellers from the Northern Tier States are most likely to include some form of sightseeing in their travel outside of their state. Fifteen percent went sightseeing in cities while 13% went sightseeing in the countryside. Other main activities include shopping, visiting friends and relative, swimming, and dining out. Rest and relaxation, amusement or theme parks, hiking or climbing, and gaming or gambling are participated in by just under 10% of these travellers.

There is little differentiation between the types of activities people participate in depending on their state of origin. The following slight differences are seen:

- N Montana residents are less likely to go sightseeing in the city or to travel for rest and relaxation;
- N Residents of Minnesota are more likely to be sightseeing in the countryside than are residents of other states;
- N Residents of Washington and Oregon are slightly more likely to participate in a gaming or gambling activity.

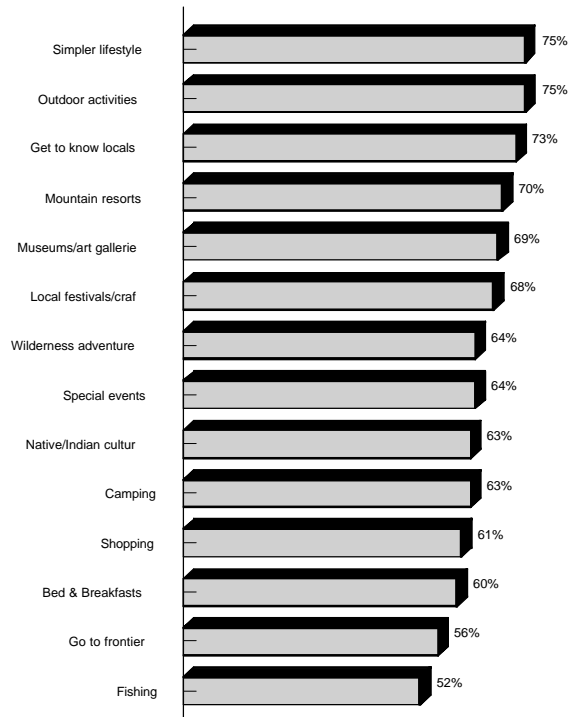
## IMPORTANCE OF PRODUCTS/BENEFITS (% Very/Somewhat Important When Choosing Destination)

### Most Important



(Q.11, N = 1,451,742)

### Lower Interest



## 5.0 TRAVEL PRODUCTS AND BENEFITS SOUGHT

### 5.1 IMPORTANCE OF PRODUCTS AND BENEFITS WHEN CHOOSING A VACATION DESTINATION

When travellers are asked to rate how important various products and benefits are when choosing their next travel vacation destination, over 90% rate the following four items as very or somewhat important:

- N A place that takes good care of its environment - 95%;
- N Rest and relaxation - 94%;
- N A place where they feel safe and secure - 93%;
- N Learning new things, increasing their knowledge - 91%.

The next tier of important products and benefits are slightly less general, and tend to be related to types of attractions. They are:

- N National parks and forests - 88%;
- N Visiting historic sites of interest - 87%;
- N A chance to see wildlife and undisturbed nature - 86%;
- N Visiting friends and relatives -85%;
- N Lakeside resorts and good place for the family - 79%.

The more specific the type of item the less likely it is to appeal to a large number of travellers. For example, outdoor activities such as hiking or biking are important to 75% of the travellers, mountain resorts 70%, museums and art galleries - 69%, and local festivals and crafts - 68%. More activity based products such as wilderness adventure, special events, camping, and going to a frontier appeal to between 50% to 65% of Northern Tier State travellers.

**PRODUCTS/BENEFITS OF IMPORTANCE IN CHOOSING VACATION DESTINATIONS BY STATE OF ORIGIN**

Percent saying very or somewhat important Q.11	TOTAL	STATE OF ORIGIN						
		Alaska	Washington	Oregon	Idaho	Montana	Dakotas	Minnesota
<b>Unweighted Base:</b>	<b>(3613)</b>	<b>(600)</b>	<b>(650)</b>	<b>(500)</b>	<b>(402)</b>	<b>(454)</b>	<b>(300)</b>	<b>(707)</b>
<b>Weighted HH Base:</b>	<b>1,451,742 %</b>	<b>55,228 %</b>	<b>552,379 %</b>	<b>288,203 %</b>	<b>32,718 %</b>	<b>19,919 %</b>	<b>50,205 %</b>	<b>453,092 %</b>
Takes good care of its environment	95	91	94	96	94	95	95	96
Rest and relaxation	94	95	92	95	93	93	94	96
Places I feel safe and secure	93	<u>85</u>	92	91	90	92	93	97
Increasing my knowledge	91	87	89	91	89	93	92	92
National parks and forests	88	<u>80</u>	87	90	91	92	92	87
Visiting historic sites of interest	87	85	87	88	87	90	90	86
Chance to see wildlife & undisturbed nature	86	<u>80</u>	87	85	90	82	86	86
Visiting friends & relatives	85	84	85	85	<b>91</b>	88	89	84
Lakeside resorts	79	<u>72</u>	76	77	81	77	83	<b>85</b>
Good place for the family	79	75	75	80	<b>85</b>	81	<b>86</b>	81
Experiencing a simpler lifestyle	75	<u>70</u>	75	77	74	72	72	76
Outdoor activities such as hiking\biking	75	75	74	73	76	72	74	77
Getting to know local people	72	<b>80</b>	75	73	<u>66</u>	73	<u>64</u>	70
Mountain resorts	70	63	68	71	<b>80</b>	73	69	70

*Bold # = significantly above average*

*# = significantly below average*

*\* = less than 1%*



**PRODUCTS/BENEFITS OF IMPORTANCE IN CHOOSING VACATION DESTINATIONS BY STATE OF ORIGIN**

Percent saying very or somewhat important Q.11	TOTAL	STATE OF ORIGIN						
		Alaska	Washington	Oregon	Idaho	Montana	Dakotas	Minnesota
<b>Unweighted Base:</b>	<b>(3613)</b>	<b>(600)</b>	<b>(650)</b>	<b>(500)</b>	<b>(402)</b>	<b>(454)</b>	<b>(300)</b>	<b>(707)</b>
<b>Weighted HH Base:</b>	<b>1,451,742 %</b>	<b>55,228 %</b>	<b>552,379 %</b>	<b>288,203 %</b>	<b>32,718 %</b>	<b>19,919 %</b>	<b>50,205 %</b>	<b>453,092 %</b>
Museums or art galleries	69	72	71	70	<b>74</b>	73	70	67
Local festivals and local crafts	68	69	72	68	69	68	66	64
Wilderness adventures	65	69	65	67	69	67	63	62
Special events (sporting\entertainment)	64	64	60	65	<b>69</b>	<b>73</b>	<b>71</b>	66
Native or Indian culture	63	65	65	<b>68</b>	65	<u>56</u>	<u>56</u>	59
Camping	63	62	66	<b>69</b>	<b>78</b>	<b>68</b>	64	<u>53</u>
Shopping	61	65	62	61	57	61	<b>66</b>	61
Bed & Breakfast or Country Inns	59	55	58	58	55	<u>52</u>	60	<b>63</b>
Go to a frontier few people have visited	56	<b>64</b>	60	55	59	54	56	<u>51</u>
Fishing	53	<b>59</b>	<u>48</u>	52	<b>65</b>	<b>64</b>	<b>58</b>	56

*Bold # = significantly above average*

*# = significantly below average*

*\* = less than 1%*

Across the Northern Tier States, there are only slight differences by state of origin in the types of products and benefits travellers feel are important when choosing their vacation destination.

N Residents of Alaska place slightly more emphasis on visiting a frontier where few people have visited before, fishing, and getting to know the local people than do residents of the other states. They put slightly less importance on feeling safe and secure, national parks and forests, chance to see wildlife and undisturbed nature, lakeside resorts, and experiencing a simpler lifestyle than do residents of other states. These are all attributes with lower importance and commonly found within their own state and, therefore, they may be important to them when choosing destinations outside of their state. For Alaskans, the number one benefit they seek is rest and relaxation; visiting a place that takes good care of its environment is the second most important attribute.

N Washington State residents are very similar to the average Northern Tier State travel, placing the greatest level of importance on a place that takes good care of its environment. They place somewhat less importance on sporting events/entertainment, and fishing.

N Oregon residents place the greatest importance on a place that takes good care of its environment and rest and relaxation. They are more likely than residents of the other states to feel that Native or Indian culture and camping is somewhat or very important.

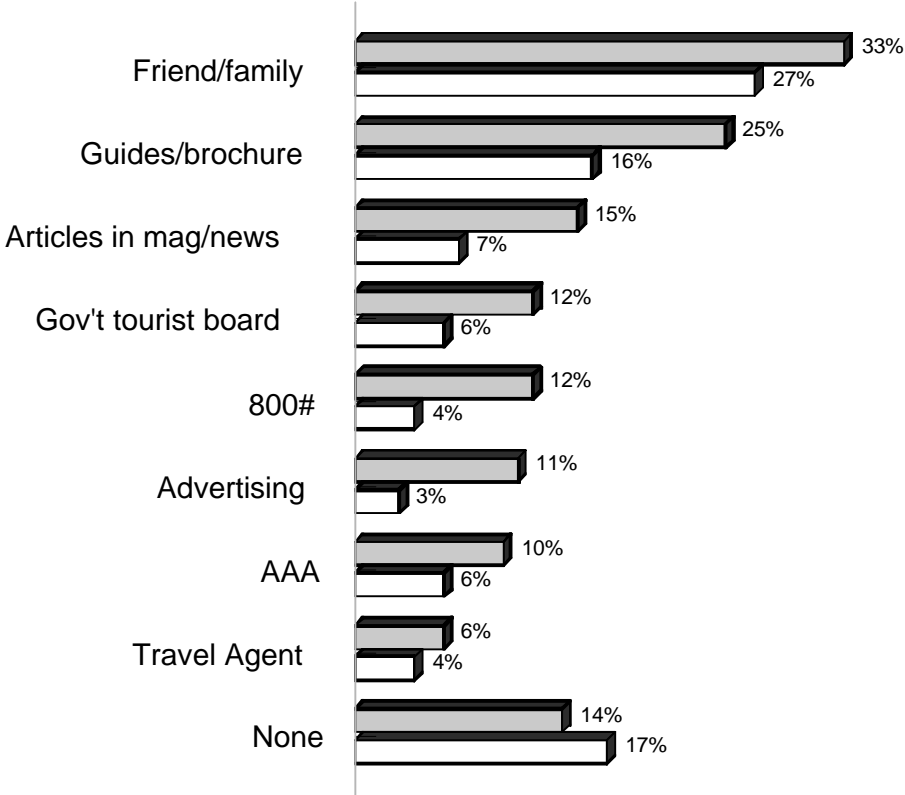
N Residents of Idaho are slightly more unique than the residents of the other states and while they place the highest levels of importance on a place that takes good care of its environment and on rest and relaxation, they place above average importance on visiting friends and relatives, a place that is good for the family, mountain resorts, museums or art galleries, special events such as sports/entertainment, camping, and fishing. They place less importance on getting to know the local people.

N Montana residents place greater importance than average on camping and special events such as sports/entertainment. They are less interested than the residents of other states in Native or Indian culture, Bed & Breakfasts/Country Inns.

- N Travellers from North/South Dakota place greater importance on a good place to take the family, sporting events/entertainment, shopping, and fishing. They place less importance on getting to know the local people and Native or Indian culture.
- N Minnesotans place the greatest importance on going to places where they feel safe and secure. This is followed by a place that takes good care of its environment and rest and relaxation. Residents of Minnesota place above average levels of importance on lakeside resorts which are very popular travel destinations in Minnesota. They also place greater importance on Bed & Breakfasts/Country Inns, while placing less importance on camping and going to a frontier where few people have visited before.

# TRIP PLANNING FOR TRAVEL TO WESTERN/NORTHERN CANADA

## Main Source of Information



(N=386,264)

## 6.0 TRAVELLING PLANNING FOR MOST RECENT TRIP TO WESTERN/ NORTHERN CANADA

### 6.1 TRAVEL INFORMATION SOURCES

When planning a trip to Western/Northern Canada the primary source of information is word-of-mouth from either friends or family. One-third of travellers who have taken a trip to Western/Northern Canada talked to either a friend or family member prior to making their final trip decision. This was the primary source for 27% of these travellers.

N Travel guides and brochures were used second most often (25%). They are the most important source of information for 16%. Articles in magazines and newspapers were read by 15% and considered as a source of information that they used.

N Government Tourist Boards, 800 numbers, advertisements, and AAA were each used by slightly over 10% of these travellers. However, none of those types of information were the most important source of information for more than 6% of the travellers.

N The use of travel agents when visiting Western/Northern Canada was extremely low. Only 6% of these travellers used a travel agent as their main source of information.

N Fourteen percent of travellers did not use any source of information prior to coming to Western/Northern Canada. The main reasons for not using any information included previous experience with the area or spontaneous decision making.

The types of information sources used varies slightly by the province of primary destination.

- N Travellers visiting Alberta were more likely to use a Government Tourism Office or Board (18%) than were travellers to the other provinces. Alberta travellers are also more likely to use automobile associations as a source of information for their most recent trip to Western/Northern Canada.
  
- N Travellers to Manitoba are less likely to have read articles about the destination in newspapers or magazines than travellers to the other provinces.
  
- N Travellers to the Northwest Territories are more likely to have spoken with friends or family members and are less likely to have used a travel guide or brochure or to have placed a 1-800 phone call for further information.
  
- N Northern Tier State residents who visited Saskatchewan were the most likely to have talked to friends or family members about it and the most likely to have referred to a travel guide or brochure. They are slightly less likely to have used a Government Tourism Office or to have seen an advertisement than travellers to other provinces.
  
- N Yukon travellers are the most likely to have spoken with a travel agent. Fourteen percent of the Yukon travellers had gone through a travel agent, and 35% had referred to travel guides or brochures.

## **6.2 PROVINCE/TERRITORY VISITED ON MOST RECENT TRIP TO W/N CANADA**

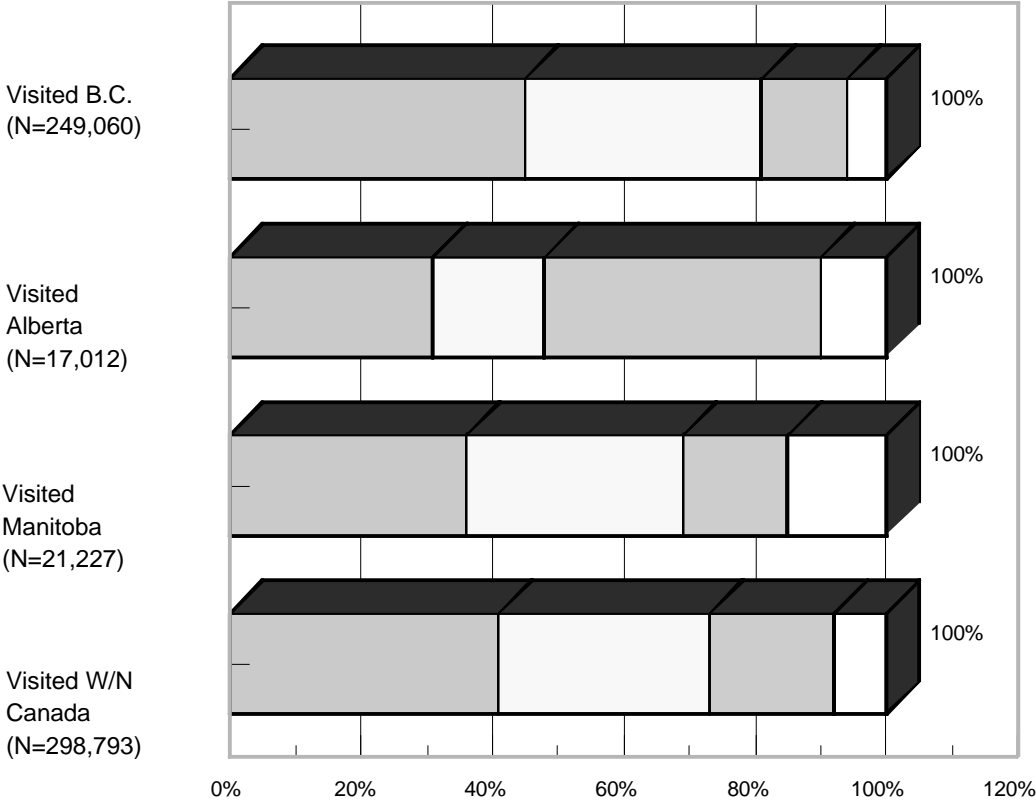
Among visitors to Western/Northern Canada, nearly one-quarter (21%) could not identify which province(s)/territory(ies) they had visited. Washington State and Dakotas travellers had the greatest knowledge of the province/territory, while travellers from Idaho and Minnesota had the least knowledge of the province/territory name.

The vast majority (67%) visited British Columbia, while 6% visited Manitoba, 5% went to Alberta, 2% to the Yukon, and 1% to Northwest Territories and Saskatchewan on their most recent trip to Western/Northern Canada.

Trips to the Yukon had the largest average length of stay (4.4 nights) followed by stays to Alberta 3.9. Stays in Manitoba, Saskatchewan and the Northwest Territories tended to last 3.4 nights while stays in British Columbia were shorter at 2.8 nights.

# TIMING OF TRIP PLANNING TO WESTERN/NORTHERN CANADA

(Most Recent Trip)



(Q.29)



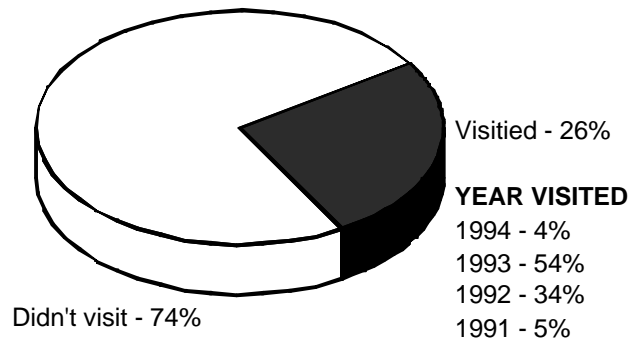
### **6.3 TRIP TIMING ON MOST RECENT TRIP TO W/N CANADA**

On recent trips to Western/Northern Canada 40% of travellers made their travel trip planning in less than one month. An additional 31% used between one and two months to plan their trip. Only 27% of the travellers required a three or more month planning cycle.

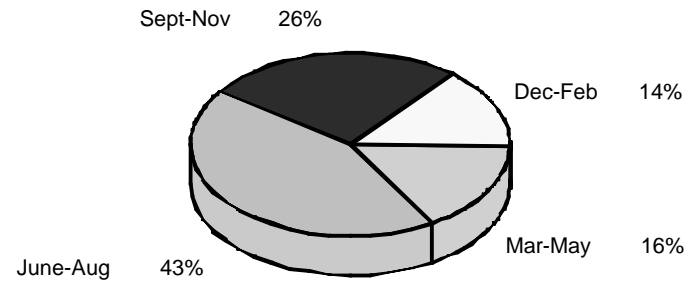
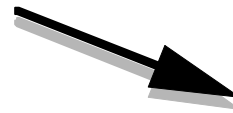
The planning cycle is the shortest for travellers to British Columbia, where 45% required less than one month, and 35% used between one to two months to plan the trip.

N Travellers to Manitoba (36%) used less than one month to plan the trip and 33% used one to two months, while travellers to Alberta had the longest planning cycle with 31% using one month, only 17% using one to two months, and 43% using three to six months to plan their trip.

# MOST RECENT TRIP TO WESTERN/NORTHERN CANADA IN PAST 2 YEARS



(N = 1,451,742)



## SEASON VISITED

(N = 382,264)

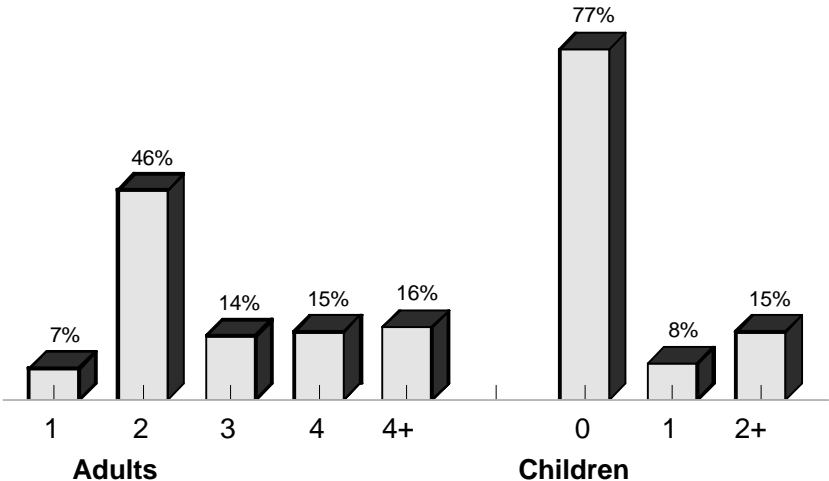
Q.22b

Overall, in the key markets of the Northern Tier States, 26% of travelling households have visited Western/Northern Canada in the past two years. The majority of those visits (54%) took place during 1993. The remainder took place primarily in late 1991 or early 1992. Four percent of the trips had already taken place in January and February of 1994.

Almost half (43%) of all trips took place between June and August, while 26% took place between September and November. Winter and Spring are the lowest seasons for Western/Northern Canada visits with Spring generating 16% of the trips and winter accounting for just 14%. Travel to British Columbia tends to be less seasonal than visits to other provinces, with a greater distribution of trips throughout the year.

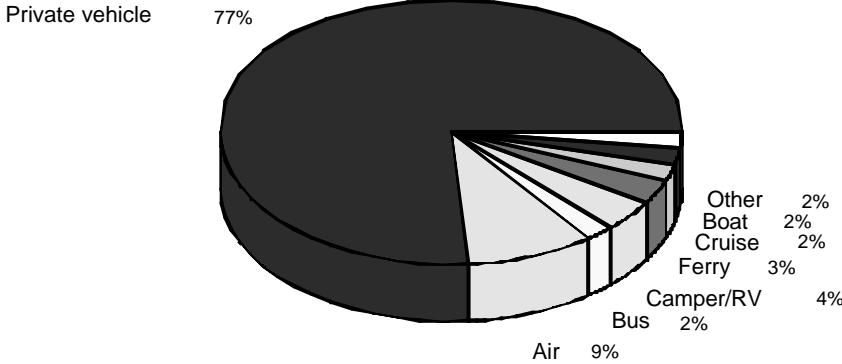
# PROFILE OF MOST RECENT WESTERN/NORTHERN CANADIAN TRIPS

## Party Size



Q.26a, Q.26b: N = 386,264

## Mode of Transportation



Q.26: N = 386,264

## **6.4 PROFILE OF MOST RECENT TRIP TO W/N CANADA**

In general, most travel to Western/Northern Canada consists of two adults travelling without children. Forty-seven percent of travel to Western/Northern Canada consists of two adults and 77% do not have any children on the trip. The average travel party was 4.5; however, 44% had only one or two person, and 58% had up to three persons.

N Only 7% travel completely independent (no other adult on the trip).

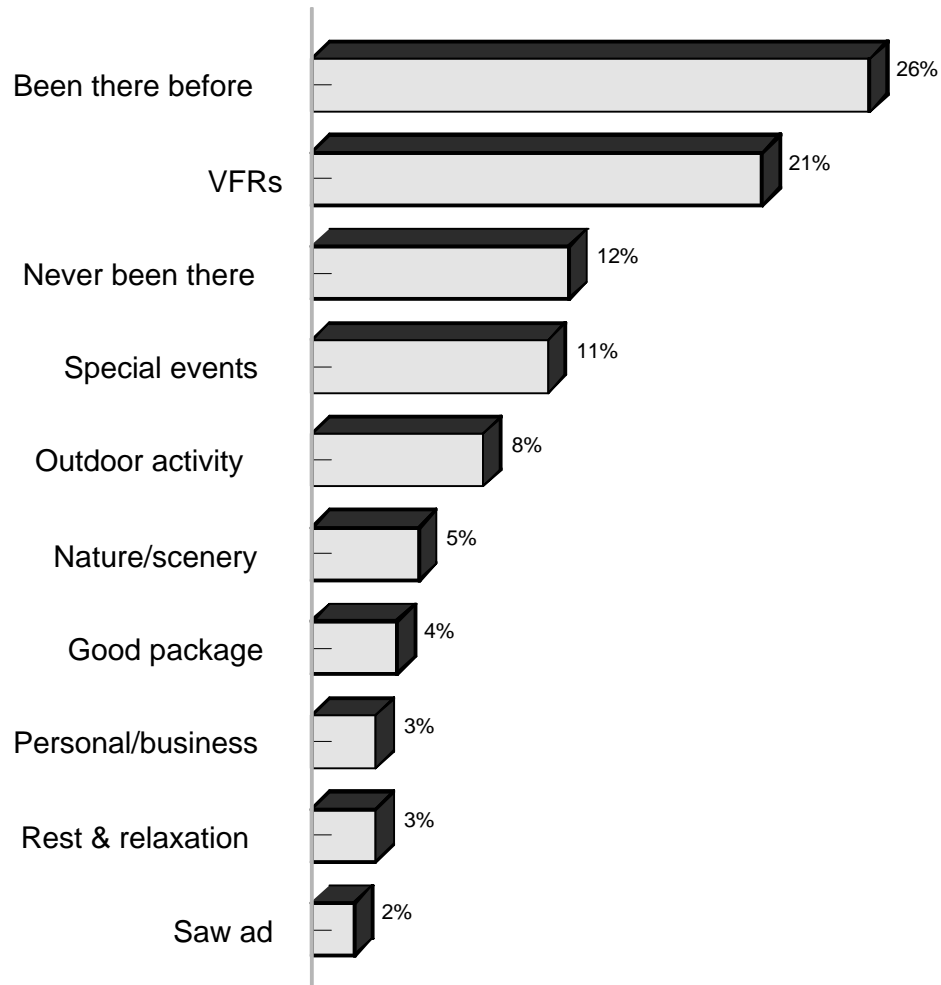
N Forty-six percent of the travel parties have more than two adults.

N Only 24% of travel parties have a child along.

Over three-quarters of these travellers arrive to Western/Northern Canada by private vehicle (77%). Air travel generates only 9% of visitation.

N Camper or RV accounts for 4%, ferry use is 3%, cruises, other boats, and buses are each 2%.

## PURPOSE OF MOST RECENT TRIP TO WESTERN/NORTHERN CANADA



Q.23: N = 298,793

