



Missouri Division of Tourism

2005 Canadian Travel Assessment *Executive Summary*

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OBJECTIVES

This research was designed to provide a broad overview of Canadians who visit the U.S.- specifically, those who take overnight trips in the U.S. Additionally, within the overall survey, a group of particular interest was the “snowbirds” who winter in the southern U.S. The goal was to assess the size of this population and to determine the best way to generate interest in visiting Missouri as they travel from Canada in the fall/winter and back again in the spring.

The specific informational objectives of this research included the following:

- **Assess attitudes toward visiting the U.S., in general, and Missouri, in particular.** Explore how Canadians feel about the U.S. and how their attitudes influence their willingness to visit;
- **Review Missouri’s existing image** among this audience and their current level of interest in visiting the State;
- **Explore the trip planning process and timeframe.** Determine how trips to the U.S. are planned, when they are planned, sources of information which can influence the decision, travel motivations, the use of travel agents, and other issues related to travel planning;
- **Determine usage of motor coach tours** as well as information about when and how these tours are booked, and how frequently this type of travel is used;
- **Specifically explore the prevalence of snowbirds** and their behavior as they travel to and from the U.S.; and
- **Forward conclusions and recommendations** regarding the Canadian market and how MDT can increase travel from this market.

METHODOLOGY

An on-line survey of Canadian travelers to the U.S. and Missouri was conducted in May 2005, after snowbirds had returned to Canada. Existing research from Statistics Canada indicated that the provinces of Ontario and Manitoba provide the bulk of visitors to Missouri. Consequently, the survey was concentrated in these provinces to provide an overview of behavior and attitudes. Those surveyed were people who had traveled and visited the U.S. in the past five (5) years. The demographics for this group are provided in the table below.

The survey gathered information about Canadians’ attitudes toward the U.S., where they had visited in the U.S., sources of information, the trip planning process, where they were interested in visiting, motor coach travel, motivations for choosing specific destinations, and familiarity and interest in visiting Missouri. The survey (459 surveys completed) was conducted on line among Canadian residents. The sample was purchased from SSI.

While this survey provides an overview of Canadian visitors, in general, the sample was not of sufficient size to capture a significant number of snowbirds. Since snowbirds are a specific market that MDT would like to learn more about, additional on-line surveys among Canadian snowbirds was necessary to draw meaningful conclusions about this group. To locate and survey such a specific group, it was necessary to work with a club or association that can provide access to such travelers.

GENERAL U.S. TRAVEL & ATTITUDES

A poor exchange rate, a serious barrier, was the single most important reason for the lack of visitation – cited by 40% of the respondents. The role of cost is further reinforced by the fact that other key barriers mentioned included “the U.S. is too expensive” and both airline and gasoline prices.

These findings may provide opportunity for Missouri to promote travel to the U.S. If the State can position itself as an affordable alternative, it may increase interest.

It is economics and not politics that seemingly keep them away:

This chart shows those who took no U.S. Trips in the past 5 Years and their attitudes toward U.S.

I would like to travel in the U.S.	3.6
The exchange rate from Canadian to U.S. dollars is not favorable enough	3.5
Things in the U.S. are too expensive	3.1
Traveling in the U.S. is safe	3.0
I do not like the U.S.' political actions and therefore prefer not to travel there	2.6

Reasons for Not Traveling to U.S.

Exchange rate	40%
Changes in personal / family situation	34%
U.S. is too expensive	27%
Safety concerns	23%
Airline prices	22%
Gasoline prices	12%
Health problems	8%
No interest/appeal to travel to U.S.	4%
Lack of finances/limited money	3%
Chose another destination	3%
No Visa/Visa Issues	3%
No time to go/Too busy	3%
Border issue/hassle to cross border	2%

INTEREST & VISITATION – U.S.

At 6%, interest in visiting Missouri was quite low - although this number is similar to that recorded for other nearby states.

When comparing to the rest of the United States, among both past visitors and non-visitors, Florida, New York, and California were by far the most popular potential destinations.

Some differences were noted when respondents identified states which they had visited in the past 12 months. 73.1% had taken an average of 2.0 trips to the U.S., lasting two or more nights. Florida was certainly the leader, with one-quarter of these U.S. traveling Canadians indicating a visit to this state.

State	Interest in Visiting in Next Year
Texas	25%
Illinois	19%
Tennessee	17%
Kentucky	15%
Indiana	10%
Missouri	6%
Oklahoma	6%
Kansas	5%
Nebraska	5%
Iowa	5%
Arkansas	4%

SNOWBIRDS

“Snowbirds” - Canadians who spend several months during the winter in the southern part of the U.S.- were of specific interest in this research. Though only a small number of those replying to our surveys were snowbirds, the following summarizes the results of travel behaviors among this group.

More than half of these snowbirds head to Florida for some or all of the winter, while California is the next most popular destination. For Missouri to be successful in attracting this audience, the State will have to identify itineraries or routes which include Missouri.

Florida	56%
California	13%
Arizona	5%
Louisiana	5%
Other	23%

Route Taken to Destination

Those who attended the travel show where we conducted surveys indicated that they spend much more time in the States and on their travel to and from Canada. This chart suggests that the majority of snowbirds do not spend a lot of time touring on their way to their winter destinations.

Stop only when necessary	72%
Stop to sightsee along the way	21%
Not direct for visiting along the way	8%

Sources of Travel Information

The Internet was indicated as a source of information more than any other source listed. Travel clubs, newspapers, and magazines were also mentioned frequently. In addition to the *Toronto Star* and *Toronto Sun*, the newspapers mentioned were the *Calgary Herald*, *Toronto Globe and Mail*, and the *National Post*.

These snowbirds had not visited Missouri within the past year, if ever, and only 13% indicated any likelihood to visit the State on their trip to or from Canada next year. This may be a result of the fact that the route is generally to Florida and it is harder to include Missouri. **This suggests that snowbirds may be a difficult market for MDT to effectively attract.**

Internet	81.8%
Auto club/other travel club	54.5%
Newspaper	45.5%
Magazines	36.4%
Consumer travel show in Canada	18.2%
State travel offices	18.2%
Local/city travel offices	18.2%
Canadian Snowbird Assn.	9.1%
Consumer travel show in US	9.1%
Travel agent	9.1%

Levels of Familiarity

Along with a lack of any intention to visit, this group was unfamiliar with Missouri and rated it low on various attributes. **With these attitudes and levels of familiarity MDT will have to first educate snowbirds about Missouri before it can attract additional visitation.**

While the response number received from snowbirds was disappointing, they do provide insight: **this group may not be suitable for MO**

I am familiar with the state of Missouri	1.8
Missouri offers plenty of live shows and entertainment	2.9
Missouri has many historical and cultural heritage sites	2.9
Missouri offers something that could appeal to the interests of everyone in my family	2.6
Missouri is an exciting and appealing destination	2.6
Missouri has unique vacation opportunities	2.3

marketing efforts. This group is difficult to reach and lacks familiarity with the state. To create interest in visiting Missouri among these snowbirds would require significant resources and time to develop.

DETAILS OF U.S. TRIPS

For a general comparison and to provide a context for evaluation, similar information from the Advertising Effectiveness research, conducted among American travelers, is also provided.

Reasons for Travel

Duration of Trip & Travel Party Size		
	Canadians	U.S. Ad Effectiveness
# Of nights	7.2	2.7
# Of people	3.1	3.4
% Traveling w/ kids	25.0%	36.2%

Reason for Travel	Canadians	U.S. Ad Effectiveness
Visit family/Friends	27.3%	36.2%
Visit specific city/Attraction	15.9%	12.9%
Attend a specific event	9.1%	15.1%
Relax & get away	30.0%	20.9%
Outdoor recreation	6.8%	3.9%
Business trip	1.4%	2.4%
Conference/Convention	0.5%	1.7%
Other	9.1%	6.5%

Motorcoach

Overall, motorcoach trips were fairly popular among Canadian travelers. When asked how many such trips they had taken in the past 12 months, which lasted at least two nights, the average was 0.5 trips per person, with 45% taking at least one such trip in the past year. ***This suggests some potential for reaching this market and increasing visitation.*** Given that the current focus of MDT marketing efforts in Canada is toward group tours, its efforts are well placed.

Trip Planning

In general, the ***Canadian travelers plan their trips to the U.S. much farther in advance than do Americans.*** U.S. Residents typically claimed to plan their travel within one month of the trip. Only about one-quarter of Canadians planned a US trip this close to departure.

Activities

Canadians seem to take advantage of their leisure travel time via a wider variety of activities. For all the listed activities, participation was much higher for these Canadians than among U.S. travelers surveyed in the Ad Effectiveness research. This finding is, however, impacted by the fact that these travelers took longer trips, thus they had more time to participate in activities.

Canadian Leisure Trip Activities

Activities	Canadian	U.S. Ad Effectiveness
Shopping	87.7%	54.7%
Visiting a city or city attractions	53.2%	21.9%
Driving tours or scenic drives	52.7%	30.0%
Touring historic sites	35.9%	19.7%
Visiting quaint attractions & small towns	32.3%	23.4%
Museums/cultural events	31.4%	14.0%
Attending live entertainment or music shows	27.3%	14.7%
Family attractions, e.g., zoo/water parks/etc.	22.3%	15.8%
Attending a festival or fair	19.1%	8.6%
Gambling	16.4%	9.0%

Trip Expenditures

In defining a target visitor group, a key piece of information is the amount of money they spend while traveling. ***Canadians spent more than twice that of their American counterparts*** – due in part to their longer trips.

Average Trip Expenditures (USD)

Expenditures for...	Canadians	U.S. Ad Effectiveness
Lodging	\$430	\$137
Meals	\$254	\$140
Entertainment	\$124	\$49
Shopping	\$282	\$205
Transportation	\$239	\$85
Attractions	\$129	\$37
Other	\$125	\$37
Total	\$1,583	\$691
Per person/per day	\$71	\$75

CANADIANS' EVALUATION OF MISSOURI

The findings regarding travel and interest in travel indicate that among Canadians, MO is not high on the list of U.S. destinations.

To increase visitation, MDT will need to convince this audience that the State has something unique to offer, and it can compete against competitors.

Statement	Have Visited MO	Never Visited MO
I am familiar with the State of Missouri	3.1	1.5
Missouri is an exciting & appealing destination	3.2	2.5
Missouri offers something that could appeal to the interests of everyone in my family	3.4	2.5
Missouri has unique vacation opportunities	3.4	2.6
Missouri offers plenty of live shows & entertainment	3.3	2.7
Missouri has many historical & cultural heritage sites	3.6	2.9

The positive news is that among those who have visited, the image of the State is much more positive. *Once people have visited, the State receives good ratings for having historical and cultural sites, offering something that could appeal to everyone in the family and having unique vacation opportunities.*

Missouri Destinations Visited

Though the group was small, respondents who had visited Missouri were asked to identify their destinations. Predictably, *the most popular destination was St. Louis, with Kansas City and Springfield earning less than half as many visits.*

This information suggests that one goal for MDT should be to increase Canadians' familiarity with the State. This is further supported by considering how familiarity impacts interest in visitation. Those who rated their familiarity either "4" or "5" were much more likely to indicate interest in visiting compared to those with lower familiarity.

Ratings of Missouri as Travel Destination

City	Overall	Age 55+
St. Louis	71%	75%
Kansas City	29%	38%
Springfield	24%	31%
Branson	16%	19%
Columbia	13%	13%
Jefferson City	11%	13%
St. Joseph	5%	6%
Hannibal	5%	13%
Cape Girardeau	3%	0%
Joplin	3%	6%
Lake of the Ozarks	3%	0%
St. Charles	3%	0%
Other	5%	13%

CONCLUSIONS

- Canadians in Ontario and Manitoba regularly travel to the U.S. for overnight trips. As such, this audience is certainly a viable one for Missouri. The challenge will be identifying ways to convince these travelers to include Missouri in their U.S. travels.
- The level of interest in traveling to Missouri is quite low, with only about 6% of respondents indicating any likelihood to visit during the next 12 months. At the same time, there is seemingly a general lack of interest in visiting many Midwestern and central U.S. destinations. Canadians now seem to be focusing on Florida, other southern states along the way, and California - preferences supported by the levels of travel interest expressed and actual visitation.
- Most Canadians are unfamiliar with Missouri and what it offers visitors. As such, the State has not established a positive image with this audience. Of course, familiarity is higher among those who have visited; the State is viewed as offering historical and cultural sites: and unique vacation opportunities-- things that could appeal to all family members. Consequently, one of the most important things that MDT can do is educate Canadian consumers about the State's myriad activities and attractions.
- The exchange rate and general expense of traveling in the U.S. seems to be quite a barrier for many Canadians. By promoting the affordability of leisure travel options in Missouri, MDT can likely attract additional visitation from many Canadians. Packaging or other discounts may be an effective promotion.
- When asked about the main purpose of their trip, Canadians were more likely to travel to the U.S. to simply relax and get away. Given their higher frequency of traveling purely for leisure, any strategies developed by MDT should include relaxation and leisure pursuits.
- Among those who had visited Missouri, Branson received weaker visitation by Canadians. In addition, the ratings for Missouri for "offers live shows" were much lower than for "has many historical and cultural heritage sites." While visitation and ratings were higher among the 55+ age group, they were still comparatively low. Together, this information supports the conclusion that Canadians are somewhat unfamiliar with both the state of Missouri and Branson and its tourism offerings. Promoting live shows and other attractions in this area would help to familiarize Canadians with the State and attract higher visitation.
- With so many Canadians interested in visiting Florida and their U.S. trips lasting a week, on average, MDT should focus on showing Canadian travelers how to include Missouri in their travel plans. Promoting the State as an easy and affordable option would appeal to Canadians who are looking for leisure options while visiting the U.S.
- Motor coach trips seem to be popular with Canadians; so this seems like a good way to penetrate this market and supports past MDT efforts in this area. MDT should continue to focus on tour operators and develop packages and tours to increase Canadian visitation to the State – and help educate people about the State's attractions and overall appeal.
- The survey also explored a specialized group of Canadian travelers – snowbirds who spend part of the winter in the United States. Overall, it can be said that the number of survey responses received from snowbirds was disappointing. However, it does provide insight that in fact, this group may not be a suitable target for MDT's marketing efforts. This group is difficult to reach and lacks familiarity with the state. To create interest in visiting Missouri among these snowbirds would require significant resources and would take time to develop. If the desire remains to market to snowbirds and influence their travels to include a stop in Missouri, efforts should be focused on reaching them through the consumer snowbird travel shows. These shows represent the most feasible opportunity for reaching this group of travelers.