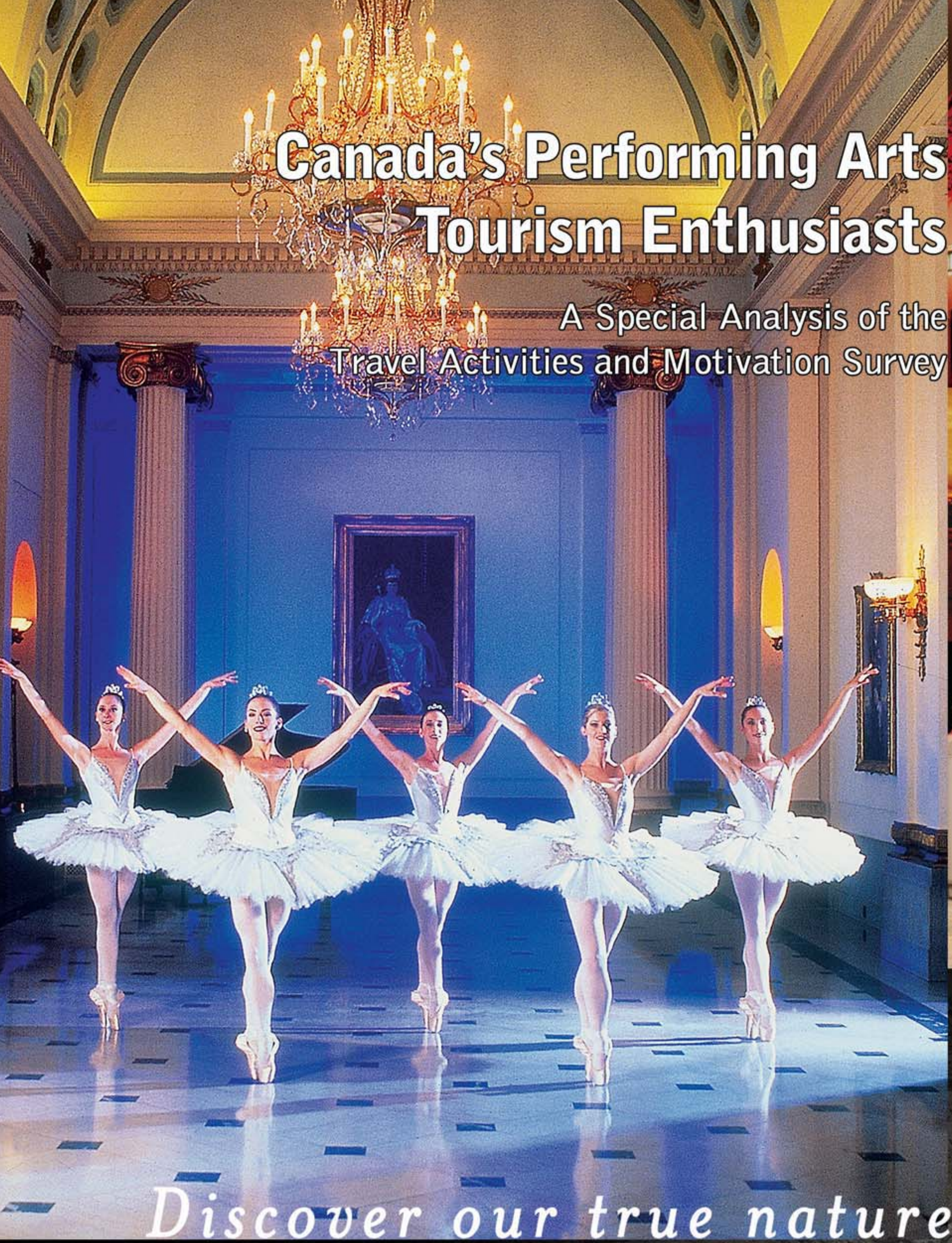
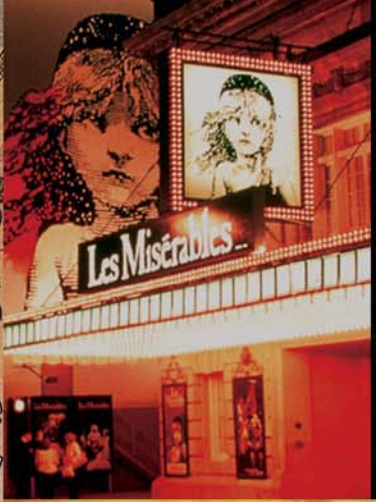


Canada's Performing Arts Tourism Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey



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Canada

Canada’s Performing Arts Tourism Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey (TAMS)

Prepared for:

The Canadian Tourism Commission (CTC)

Prepared by:

Research Resolutions
& Consulting Ltd.

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The Stratford Festival of Canada.
The Adventures of Pericles, May 24 to October 31, 2003
(left to right) Jonathan Goad as Pericles, Karen Ancheta as Thaisa and Charles Azulay as Simonides
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1. Introduction

Canada offers a wide range of tourism experiences to its residents. In order to obtain a better understanding of the potential size, characteristics and interests of Canadian activity-based market segments, the Canadian Tourism Commission (CTC) commissioned Research Resolutions & Consulting Ltd. to undertake special analyses and reports based on the Travel Activities and Motivation Survey (TAMS). This report focuses on **Performing Arts Tourism Enthusiasts** – Canadians who have taken leisure trips in Canada and exhibit a particular interest in cultural performances when they travel. As such, they have taken leisure trips in Canada and, in many cases, to other destinations in the past couple of years. They have taken at least one trip that focussed on experiencing different cultures/ways of life or experiencing city life and have included at least three of the following activities on their travels:

- music festivals
- literary festivals or events
- theatre festivals
- opera
- ballet or other dance
- theatre
- classical music concerts
- jazz music concerts
- musical attractions such as Jazzland

These tourists provide a rich source of information for tourism businesses and marketers who want to increase or retain the Performing Arts Tourism Enthusiast market in Canada in the future.

In addition to a *current* profile of Performing Arts Tourism Enthusiasts, the TAMS survey has been modified to permit an assessment of the impacts of an aging population on market potential for this group. Using population projections for Canada obtained from Statistics Canada, TAMS data were "aged" twenty-five years into the future. Comparisons of the market size, composition, and travel behaviour of Canadians in 2000 with estimates of the market profile in 2026 provide tourism planners and marketers with critical information about the products and services that may be required in the future to attract tourists from Canada's largest market – Canadians travelling in Canada. Chapter 4 of this report is devoted to the impacts of population changes on the domestic Performing Arts Tourism Enthusiast market.

Additional reports, featuring profiles of other outdoor and cultural segments in the United States and Canada are available from the CTC. Topics include Soft Outdoor and Hard Outdoor Adventure Enthusiasts, Visual Arts Enthusiasts, Heritage Tourism Enthusiasts, Wine and Culinary Enthusiasts, and Winter Outdoor Activity Participants.

2. Executive Summary

2.1 Performing Arts Tourism Enthusiasts: Market Size

Of the 23.3 million Canadian adults in 2000, about 1.3 million are Performing Arts Tourism Enthusiasts (6%). Of these, over 8-in-10 claim to have taken a leisure trip within Canada during the past two years or so. Thus, the domestic tourism market for Canada's performing arts products is approximately 1.1 million adults.

Canadians from all parts of the country are represented among Performing Arts Tourism Enthusiasts but this tourism segment is highly concentrated in Canada's major cities and specifically in Toronto. Montréalers are also somewhat over-represented among performance enthusiasts.

The high concentration of Performing Arts Tourism Enthusiasts in Toronto may be explained by the considerable opportunities this city offers for residents to go to live theatre, opera, ballet and concerts *at home,* thereby possibly creating enhanced interest in these types of activities when travelling.

Since many Canadians concentrate their travel *within* the province or region in which they live, it is not surprising that the three most populous provinces achieve the highest share of Performing Arts Tourism Enthusiasts. Smaller numbers of Canadians live in Atlantic Canada, Alberta and Manitoba/Saskatchewan and, as a consequence, lower proportions of Performing Arts Tourism Enthusiasts claim to have taken leisure trips to these destinations in the past couple of years than is the case with the more populous provinces.

Those that are especially successful in attracting Performing Arts Tourism Enthusiasts over a two year period relative to their share of the Canadian adult population include Atlantic Canada (3.0), Alberta (2.4) and, to a lesser extent, British Columbia (2.4). Between two and three times as many Performing Arts Tourism Enthusiasts claim to have visited these regions as their share of the total adult population would suggest.

Ontario is the least successful in attracting domestic performance tourists relative to its population – this province represents 38 per cent of the country's adults and 63 per cent of Performing Arts Tourism Enthusiasts, for an "attraction rate" of 1.7. Quebec falls between the high levels evident for Canada's eastern and western regions, representing 25 per cent of the adult population and attracting 47 per cent of Performing Arts Tourism Enthusiasts over a two year period, for a 1.9 "attraction rate".

The U.S.A. is a strong competitor for travel within the Performing Arts Tourism Enthusiast segment. Almost half of these tourists say they have taken leisure trips to the United States (45%) and about one-quarter have gone to a sun/sea destination over the past couple of years (26%).

The United Kingdom and other European countries also exhibit a strong draw for Canada's Performing Arts Tourism Enthusiasts. Fewer than 1-in-10 Canadian travellers as a whole claim to have taken a European holiday over the past couple of years (9%) but three times this proportion of Performing Arts Tourism Enthusiasts make this claim (28%).

2.2 Performing Arts Tourism Enthusiasts: Demographic Characteristics

Compared to the total market for all leisure tourism experiences over the past couple of years, performance-goers are primarily women and are somewhat over-represented among Canadians between 18 and 34 years. This age group represents 1-in-3 domestic travellers as a whole (33%) but close to two-fifths of Performing Arts Tourism Enthusiasts (38%). They are also over-represented in the 55 to 64 year old age group (17%) relative to the Canadian travelling public as a whole (12%).

Most Performing Arts Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Fewer than one-quarter are likely to be in the market for performance-based tourism experiences that take into account the interests and needs of teenagers or children (23%).

Performing Arts Tourism Enthusiasts have income levels about on par with the "typical" domestic traveller in Canada, with an average household income of $56,000 compared to $54,900 for the typical leisure visitor in Canada (1998 dollars). They are, however, much more likely than is the typical Canadian traveller to have a university degree (36%). A further two-fifths of these cultural enthusiasts have had some other post-secondary education.

A higher proportion of Performing Arts Tourism Enthusiasts were born outside Canada (24%) than is the case within the general domestic travelling public (15%).

2.3 Performance-based Activities

By definition, Performing Arts Tourism Enthusiasts participate in multiple performance-based activities while on trips. They may have engaged in these activities while on a recent trip in Canada or on trips to other destinations, worldwide. The most popular performances – sought by between one-half and one-third of these tourists while on a trip in the past couple of years – span theatrical performances and festivals, concerts and dance.

Activities Engaged in by more than 30 per cent of Performing Arts Tourism Enthusiasts

- Theatre (87%)
- Classical music concerts (62%)
- Music festivals (54%)
- Theatre festivals (53%)
- Jazz music concerts (47%)
- Ballet/other dance performances (43%)
- Opera (38%)

Other performances that attract between 10 per cent and 30 per cent of these tourists include literary festivals (26%) and musical attractions such as Jazzland (16%).

2.4 Overlap With Other Activity-Based Segments

Canadian Performing Arts Tourism Enthusiasts with recent leisure travel experiences in their own country have relatively wide-ranging tourism interests, with a particular emphasis on other *cultural* activities.

The 1.1 million Performing Arts Tourism Enthusiasts share the travel interests of Visual Arts Enthusiasts – two-thirds are also in this market segment (699,000) and, to a lesser extent with Heritage Tourism Enthusiasts (53%, or 568,000). They are also likely to seek outdoor adventure tourism activities on their travels, including alpine skiing (29%, or 311,000) and other winter outdoor activities (34%, or 365,000).

The Wine and Culinary Enthusiast segment also overlaps with performing arts tourists. More than 1-in-4 Performing Arts Tourism Enthusiasts (303,000) are also interested in wine and culinary experiences on their trips.

These overlaps suggest considerable opportunities for cross-market packaging and promotion *within* cultural, outdoors and wine/culinary tourism products for the domestic Performing Arts Tourism Enthusiast market.

2.5 Image Challenges & Media Sources

Canada is most highly rated by domestic Performing Arts Tourism Enthusiasts for attributes that support an *outdoors* rather than a *cultural* or *urban* image:

- A place with beautiful scenery;
- One of best destinations for outdoor activities;
- A great place to relax and get away from it all;
- A place with lots of things for families to see and do;
- A place with lots of things for mature adults to see and do.

Performance-goers also rate Canada favourably for being a good fishing destination, a summer destination, being safe, having friendly people, and for being clean and well cared for and for its many cultural events and attractions.

Less favourable ratings are accorded attributes associated with shopping opportunities, as a place to experience city life, to experience Aboriginal culture, for respecting the natural environment, as a winter destination, as a place for romance, value for money and for experiencing the "good life".

Image building and product awareness messages are likely to achieve the highest reach in daily and weekend editions of local newspapers, including the travel sections of these editions and through the Canadian Automobile Association (CAA).

2.6 Impacts of Population Changes

Fundamental changes in Canada’s population structure might be taken into account in tourism planning and product development for domestic Performing Arts Tourism Enthusiasts over the next two decades:

- Provinces and regions throughout Canada will grow at different rates, with Ontario and British Columbia experiencing the highest growth rates and Quebec and Atlantic Canada experiencing the lowest. At an estimated 37 per cent increase in the adult population of Ontario by 2026 compared to a 27 per cent increase for the entire country, the pool of Ontarians from which Canada has to draw will increase from 8.9 to 12.2 million, and the Toronto CMA will increase from about 3.6 million to 6.1 million by 2026.
- Older people – those who are at least 55 years of age – will represent an increasingly sizeable proportion of the Canadian population. They currently account for over one-quarter of the adult population (28%) but will represent over two-fifths by 2026 (42%).
- Canadian residents born outside Canada will increase from about 21 per cent now to 28 per cent by 2026, with much of this increase being absorbed by major urban centres that act as reception centres for new Canadians, and particularly Toronto and Vancouver. By 2026, more than half of adult residents of each of these metropolitan areas will have been born outside Canada.

2.7 Implications for Performing Arts Tourism Enthusiasts

There will be an increase in the absolute number of Canadians who will be in the market for performance-based activities between 2000 and 2026, from an estimated 1.3 million now to about 2.0 million in 2026. Canada’s likely share of this market – those who will seek cultural performances and take leisure trips within Canada – is also expected to grow from 1.1 million to 1.5 million.

At 44 per cent, this growth rate is 61 per cent **higher** than would have been expected given today’s population structure. Possibly reflecting the increasing proportion of new Canadians by 2026 and their comparative reluctance to travel *within* Canada, and the reliance of the performance segment on younger Canadians, the growth rate for performance tourists who will likely travel within the country (44%) is lower than is predicted growth for the segment as a whole (98%).

It is not a foregone conclusion that new performance-oriented tourists will seek theatrical performances, concerts or recitals or dance performances *in Canada.* New Canadians display a strong tendency to take their leisure trips to destinations outside North America. While they provide opportunity for Canada’s performance-based tourism products, new Canadians may require special cultural amenities (e.g., language, dietary needs, religious observances, etc.) and different performance content to encourage them to explore *Canada’s* performance-based tourism products.

2.8 Summary

The domestic Performing Arts Tourism Enthusiast market for Canada is characterized by the predominance of women, concentrations at both the younger and older ends of the age spectrum, a high level of formal education, and concentration in Canada's largest cities.

Of performance-based tourism activities measured, live theatre and classical music concerts have the greatest appeal to these tourists.

Of the market segments of special interest to the CTC, domestic Performing Arts Tourism Enthusiasts currently represent the smallest pool of potential cultural visitors – 1.3 million adult Canadians. Of these Canadians, over 8-in-10 have taken recent leisure trips in Canada (1.1 million), leaving some opportunity for growth.

The potential Performing Arts market has growth potential over the next two decades, in large part because it appeals to a segment of older Canadians and to individuals born outside Canada. Both of these segments are expected to experience substantive growth between now and 2026.

New Canadians exhibit a strong tendency to seek performance-oriented experiences when they travel . . . but they are more reticent than Canadian-born residents to visit *Canadian* destinations. The performance-based tourism sector will likely be challenged to find ways to encourage the increasing numbers of new Canadians to take leisure trips in their adopted country.

The strong link between Performing Arts Tourism Enthusiasts and other cultural activity enthusiasts creates cross-marketing and packaging opportunities with heritage and visual arts tourism experiences.

Image building for Canada's performing arts products over the next two decades will likely be required to increase the enthusiasm of Performing Arts Tourism Enthusiasts for destinations in Canada vis à vis the U.S.A. and Europe.

3. Canadian Performing Arts Tourism Enthusiasts – 2000

3.1 Market Size & Overlap With Other Activity Groups

The CTC identified several market segments generated from variables within the Travel Activities and Motivation Survey (TAMS) for special analysis. These include Performing Arts Enthusiasts, Heritage Enthusiasts, Hard and Soft Outdoor Adventure Enthusiasts, Wine and Culinary Enthusiasts, Alpine Skiers, Other Winter Activity Participants (non-alpine), and Visual Arts Enthusiasts (see Appendix for definitions). The table below provides information on the total size of each of these market segments, the number who have travelled to a Canadian destination in the past couple of years and the degree of overlap within the Performing Arts Tourism Enthusiast segment.

Of the 23.3 million Canadian adults in 2000, about 1.3 million are Performing Arts Tourism Enthusiasts (6%). Of these, over 8-in-10 claim to have taken a leisure trip within Canada during the past two years or so. Thus, the domestic market for Canada's performing arts tourism products is approximately 1.1 million adults.

Table 1: Canadian Performing Arts Tourism Enthusiasts – Market Size & Comparisons With Other Segments

	CANADIAN ADULTS	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	TOTAL	PERFORMANCE ENTHUSIASTS
Adults 18+	*23.3 million*	*14.0 million*	*1.1 million*
Performing Arts	**1.3**	**1.1**	**1.1**
Wine/Culinary	1.8	1.5	0.3
Heritage	2.6	2.2	0.6
Visual Arts	2.1	1.7	0.7
Soft Outdoor Adventure	5.3	4.4	0.4
Hard Outdoor Adventure	1.6	1.3	0.3
Winter Outdoors (excluding alpine skiing)	3.6	3.1	0.4
Alpine Skiing	2.8	2.4	0.3

Source: Special TAMS Tabulations, page 8-1. See Appendix for unweighted base sizes.

At 1.1 million, these Performing Arts Tourism Enthusiasts represent fewer Canadians than do other culture-based market segments of special interest to the CTC, e.g., Heritage and Visual Arts Enthusiasts and than the outdoor-oriented market segments.

Performing Arts Tourism Enthusiasts with recent Canadian leisure travel experiences share interests of Visual Arts Enthusiasts – two-thirds are also in this market segment (699,000). They also have a tourism activity profile that is consistent with Heritage Enthusiasts (53%, or 568,000). To a lesser extent, performance-oriented tourists are likely to seek outdoor adventure tourism activities on their travels (34%, or 367,000) including alpine skiing (29%, 311,000) and other winter outdoor activities (34%, 365,000). The Wine and Culinary Enthusiast segment also overlaps with performing arts tourists. More than 1-in-4 Performing Arts Tourism Enthusiasts (303,000) are also interested in wine and culinary experiences on their trips. These overlaps suggest considerable opportunities for cross-market packaging and promotion *within* cultural, outdoors and wine/culinary tourism products for the domestic Performing Arts Tourism Enthusiast market.

Within the subset of all Canadian adults who take leisure trips in Canada and participate in at least one cultural activity – estimated to be approximately 11.2 million Canadians – the Performing Arts Tourism Enthusiast segment represents about one-tenth. This proportion is considerably lower than that evident for two of the outdoor-oriented segments of stated interest to the CTC. Soft Outdoor Adventure Enthusiasts represent over one-third and non-alpine winter sports participants represent almost one-quarter of Canadians who have participated in at least one cultural activity on trips and who have taken a leisure trip in Canada recently.

Table 2: Market Share of Key Segments

	Canadian Adults	Recent Leisure Travellers in Canada	
Millions of Adults 18+	**Total**	**Total**	**Any Cultural Activities**
Heritage	11%	15%	19%
Wine/Culinary	8%	11%	13%
Performing Arts	**6%**	**8%**	**10%**
Visual Arts	9%	12%	16%
Soft Outdoor Adventure	23%	31%	35%
Winter Outdoors (excluding alpine skiing)	15%	22%	25%
Alpine Skiing	12%	17%	19%

Source: Special TAMS Tabulations, page 8-1. See Appendix for unweighted base sizes.

3.2 Where They Live and Where They Travel

Canadians from all parts of the country are represented among Performing Arts Tourism Enthusiasts but this tourism segment is highly concentrated in Canada's major cities and specifically, in Toronto. One-sixth of Canada's adult population lives in the Toronto Census Metropolitan Area (CMA), but fully one-quarter of Performing Arts Tourism Enthusiasts live in this city (25%). Montréalers are also somewhat over-represented among performance enthusiasts. The high concentration of Performing Arts Tourism Enthusiasts in Toronto may be explained by the considerable opportunities this city offers for residents to go to live theatre, opera, ballet and concerts *at home,* thereby possibly creating enhanced interest in these types of activities when travelling.

Table 3: Place of Residence of Canadian Performing Arts Tourism Enthusiasts

	Canadian Adults	Recent Leisure Travellers in Canada	
	Total	Total	Performance Enthusiasts
Adults 18+	*23.3 million*	*14.0 million*	*1.1 million*
Atlantic Canada	8%	8%	7%
Quebec	25%	24%	24%
Montréal CMA	12%	11%	15%
Ontario	38%	35%	48%
Toronto CMA	16%	12%	25%
Manitoba/Saskatchewan	7%	8%	4%
Alberta	9%	11%	6%
British Columbia	13%	15%	12%
Vancouver CMA	7%	7%	7%

Source: Special TAMS Tabulations, pages 1; 26. Percentages may not add to 100% due to rounding.
Note: Residents of the Territories were not included in the TAMS survey.

Apart from over-representation in Toronto, and therefore, in Ontario (48%), Performing Arts Tourism Enthusiasts mirror the adult population distribution of eastern Canada as a whole. For example, 1-in-12 Canadians live in Atlantic Canada and about the same proportion of performance-goers live in these four provinces (7%). Quebec represents one-quarter of the Canadian adult population and the same proportion of these enthusiasts (24%) are residents of this province. In the Prairies, there is evidence of under-representation. Specifically, a lower proportion of Performing Arts Tourism Enthusiasts live in Manitoba/Saskatchewan (4%) than would be expected (7%) and the same is true for Alberta (6% versus 9% of the total population).

Canadians in the Performing Arts Tourism Enthusiast market travel in Canada's regions in much the same way as does the travelling public at large. As such, they are most apt to have visited Ontario in the past couple of years (63%), followed at a relatively wide distance by Quebec (47%), and less commonly, British Columbia (31%).

Since many Canadians concentrate their travel *within* the province or region in which they live, it is not surprising that the three most populous provinces achieve the highest share of Performing Arts Tourism Enthusiasts. Smaller numbers of Canadians live in Atlantic Canada, Alberta and Manitoba/Saskatchewan and, as a consequence, lower proportions of Performing Arts Tourism Enthusiasts claim to have taken leisure trips to these destinations in the past couple of years: Atlantic Canada (24%), Alberta (22%) and Manitoba or Saskatchewan (12%) than is the case with the more populous provinces.

Some regions can be said to have particularly high "attraction rates" compared to others because they lure high levels of Performing Arts Tourism Enthusiasts relative to their resident populations.

Table 4: Canadian Performing Arts Tourism Enthusiasts – Destinations Visited in Past 2 Years

	CANADIAN ADULTS	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	TOTAL	PERFORMANCE ENTHUSIASTS
Adults 18+	*23.3 million*	*14.0 million*	*1.1 million*
Canadian Destinations	60%	100%	100%
Atlantic Canada	11%	18%	24%
Quebec	21%	36%	47%
Ontario	29%	48%	63%
Manitoba/Saskatchewan	9%	15%	12%
Alberta	14%	24%	22%
British Columbia	18%	30%	31%
Territories	1%	1%	3%
Other Destinations			
Any U.S.A. Destination	29%	36%	45%
Mexico/Caribbean	9%	9%	15%
U.K./Other Europe	8%	9%	28%
Other Countries	6%	6%	13%
Sun/Sea Destinations	20%	23%	26%
Any Locations Outside Canada (NET)	39%	45%	62%

Source: Special TAMS Tabulations, pages 2; 27. Percentages do not add to 100% because of multiple destinations.

Those that are especially successful in attracting Performing Arts Tourism Enthusiasts over a two year period relative to their share of the Canadian adult population include Atlantic Canada (3.0), Alberta (2.4) and, to a lesser extent, British Columbia (2.4). Between two and three times as many Performing Arts Tourism Enthusiasts claim to have visited these regions as their share of the total adult population would suggest.

Ontario is the least successful in attracting domestic performance tourists relative to its population – this province represents 38 per cent of the country's adults and 63 per cent of Performing Arts Tourism Enthusiasts, for an "attraction rate" of 1.7. Since it is a substantive tourism *market* for Ontario, the fact that Quebec generates comparatively few performing arts tourists may explain why Ontario is not a more prominent performing arts tourism destination for Canadians.

Quebec falls between the high levels evident for Canada's eastern and western regions, representing 25 per cent of the adult population and attracting 47 per cent of Performing Arts Tourism Enthusiasts over a two year period, for a 1.9 "attraction rate".

The U.S.A. is a strong competitor for travel within the Performing Arts Tourism Enthusiast segment. Almost half of these tourists say they have taken a leisure trips to the United States (45%) and about one-quarter have gone to a sun/sea destination over the past couple of years (26%). The United Kingdom and other European countries also exhibit a strong draw for Canada's Performing Arts Tourism Enthusiasts. Fewer than 1-in-10 Canadian travellers as a whole claim to have taken a European holiday over the past couple of years (9%) but three times this proportion of Performing Arts Tourism Enthusiasts make this claim (28%). The strong lure of Europe and other countries relative to Canadian travellers as a whole is undoubtedly linked to the high proportion of Performing Arts Enthusiasts who have direct ties to these countries because they were *born* there (see Section 3.3).

Retention of Performing Arts Tourism Enthusiasts for Canadian cultural performances and events will likely be a challenge since more than 3-in-5 of them have taken holidays outside Canada – including the U.S.A., Europe and other countries – over the past two years (62%).

3.3 Demographic Characteristics of Performing Arts Tourism Enthusiasts

Performing Arts Tourism Enthusiasts are almost twice as likely to be women (63%) as they are to be men (37%). They span the age spectrum with concentrations at the lower and upper ends.

Table 5: Demographics of Canadian Performing Arts Tourism Enthusiasts – Gender & Age

	Recent Leisure Travellers in Canada	
	Total	Performance Enthusiasts
Adults 18+	*14.0 million*	*1.1 million*
Men	48%	37%
Women	52%	63%
18 - 34 years	33%	38%
35 - 44 years	24%	18%
45 - 54 years	19%	15%
55 - 64 years	12%	17%
65+ years	13%	13%
Average Age	43.4 years	42.9 years

Source: Special TAMS Tabulations, pages 3-1; 28-1.

Compared to the total market for all leisure tourism experiences over the past couple of years, domestic performance-goers are somewhat over-represented among Canadians between 18 and 34 years. This age group represents 1-in-3 domestic travellers as a whole (33%) but close to two-fifths of Performing Arts Tourism Enthusiasts (38%). They are also over-represented in the 55 to 64 year old age group (17%) relative to the Canadian travelling public as a whole (12%).

The over-representation at the younger and older ends of the age spectrum likely explains why the average age of Performing Arts Tourism Enthusiasts is about the same as the average age for domestic leisure tourists in total – 43 years.

Performing Arts Tourism Enthusiasts span the income and education spectrums, with close to two-fifths falling into a relatively low income group (under $40,000), possibly explained by the sizeable number of younger people in the early stages of their earning careers who are performing arts tourists. One-quarter claim to have a household income in the $40,000 to $60,000 range (24%) and somewhat more fall between $60,000 to $100,000 (27%). Incomes in excess of $100,000 are characteristic of one-eighth of these performance enthusiasts (12%).

Table 6: Demographics of Canadian Performing Arts Tourism Enthusiasts – Income & Education

	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	PERFORMANCE ENTHUSIASTS
Adults 18+	*14.0 million*	*1.1 million*
Household Income		
Under $40,000	39%	38%
$40,000 - $59,999	26%	24%
$60,000 - $99,999	25%	27%
$100,000 or more	11%	12%
Average	$54,900	$56,000
Education		
Some Secondary or Less	14%	4%
Completed Secondary	26%	18%
Some Post Secondary	39%	41%
Graduated University	21%	36%

Source: Special TAMS Tabulations, pages 4, 5-2; 29,30-1/2. Income is percentaged among those stating.

These income levels are almost identical to those evident for Canadian travellers as a whole. For this reason, it is not surprising to find that the average household income for Performing Arts Tourism Enthusiasts – $56,000 – is not dramatically higher than all domestic travellers ($54,900).

Although higher household incomes are consistent with higher levels of formal education, an even greater proportion of Performing Arts Tourism Enthusiasts have at least one university degree (36%) than might be expected in light of their income levels. This level of university graduates is much higher than is found among Canadian leisure travellers as a whole. In addition to the many university graduates, a further 2-in-5 members of the performance tourism segment have had some other form of post-secondary education.

Most Performing Arts Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Fewer than one-quarter might be in the market for performances on their trips that take into account the interests and needs of teenagers or children (23%) and even fewer might seek performances for children twelve years of age or under (15%). The household composition of this market segment reflects the higher than average number of *young adults,* before they have started families and of *empty nesters* at the older end of the age spectrum.

Table 7: Demographics of Canadian Performing Arts Tourism Enthusiasts – Household Composition

	Recent Leisure Travellers in Canada	
	Total	Performance Enthusiasts
Adults 18+	*14.0 million*	*1.1 million*
Adult Only	65%	77%
Any Teens/Children	35%	23%
Any Children under 12	26%	15%

Source: Special TAMS Tabulations, pages 6-2; 31-2.

A higher proportion of Performing Arts Tourism Enthusiasts were born outside Canada (24%) than is the case within the general domestic travelling public (15%). Approximately half of those born outside the country came to Canada from the United Kingdom or other European countries.

Table 8: Demographics of Canadian Performing Arts Tourism Enthusiasts – Place of Birth

	Recent Leisure Travellers in Canada	
	Total	Performance Enthusiasts
Adults 18+	*14.0 million*	*1.1 million*
Born In Canada	85%	76%
Born Outside Canada	15%	24%

Source: Special TAMS Tabulations, pages 7; 32.

3.4 Travel Activities Among Performing Arts Tourism Enthusiasts

3.4.1 Performing Arts Activities

Of the activities used to define Performing Arts Tourism Enthusiasts, live theatre performances are the most popular. Close to 9-in-10 of these enthusiasts claim to have gone to such a performance on a leisure trip in the past couple of years. It is important to note that even though these Performing Arts Tourism Enthusiasts travelled within Canada during the past several years, the survey findings do not provide an indication of whether their theatre experiences or any other activities discussed in this report took place on a *Canadian* trip.

Table 9: Canadian Performing Arts Tourism Enthusiasts – Activities Used To Define Market Segment

	PERFORMANCE ENTHUSIASTS
Adults 18+	*1.1 million*
Theatre	87%
Classical music concerts	62%
Music festivals	54%
Theatre festivals	53%
Jazz music concerts	47%
Ballet or other dance	43%
Opera	38%
Literary festivals	26%
Musical attractions such as Jazzland	16%

Source: Special TAMS Tabulations, page s 10-1/2

Other popular *defining* activities include classical music concerts as well as music and theatre festivals. These experiences are sought by at least one-half of Performing Arts Tourism Enthusiasts while on recent trips.

Just under one-half of the Canadians in this market segment seek out jazz concerts and/or ballet performances on their trips. About one-third go to the opera and about one-quarter go to literary festivals as part of their itineraries.

3.4.2 Heritage and Visual Arts Activities

Performing Arts tourists are also likely to engage in many of the activities used to define the *heritage* tourism market segment. In fact, 2-in-3 Performing Arts Tourist Enthusiasts also go to general history museums when travelling. Other popular *heritage* activities include farmers' fairs or markets, local festivals and fairs, science and technology museums and historic sites. These experiences are sought by close to one-half of Performing Arts Tourism Enthusiasts.

Table 10: Canadian Performing Arts Tourism Enthusiasts – Heritage Activities

	PERFORMANCE ENTHUSIASTS
Adults 18+	*1.1 million*
General history museums	68%
Farmers' fairs or markets	56%
Local festivals or fairs	56%
Science & tech museums	45%
Historic sites	45%
Pick your own farms / harvesting	35%
Historical replicas of cities/towns	33%
French Canadian cultural experiences	32%
Children's museums	15%
Aboriginal cultural experiences in remote or rural setting	14%
Carnivals such as Caribana/ Mardi Gras or Rio's Carnival	14%
Western theme events	13%
Aboriginal attractions	13%
Pow Wow/other Aboriginal celebrations	4%

Source: Special TAMS Tabulations, page s 10-1/4

About one-third of the Canadians in this market segment seek harvesting or "pick-your-own" farm experiences, French Canadian cultural activities and/or replicas of cities or towns on their travels. Not surprisingly in light of the adult-only composition of their households, these performance-goers do not express particular interest in children's museums. They are also comparatively uninterested in Aboriginal cultural events and attractions or in western theme events.

Performing Arts Tourism Enthusiasts are also apt to go to art galleries (77%) and to shop or browse in local arts and crafts studios (71%) while on their trips.

These high levels of overlap with activities used to define Heritage and Visual Arts Enthusiast segments are suggestive of cross-marketing and packaging opportunities between these groups and Performing Arts Tourism Enthusiasts.

Table 11: Canadian Performing Arts Tourism Enthusiasts – Visual Arts Activities

	PERFORMANCE ENTHUSIASTS
Adults 18+	*1.1 million*
Visual Arts	
Art galleries	77%
Local arts & crafts studios	71%
International film festivals	16%

Source: Special TAMS Tabulations, pages 10-1/5.

3.4.3 Other Attraction-Based Activities

Approximately one-half of those who travelled in Canada in the past couple of years and are Performing Arts Tourism Enthusiasts claim to have gone to zoos, botanical gardens and/or aquariums while on trips in the recent past. Planetariums and casinos are less commonly visited attractions among these tourists. From a packaging and marketing perspective, attractions such as zoos, gardens and aquariums might be strategic additions to attract the domestic performance market to Canada's destinations.

Table 12: Canadian Performing Arts Tourism Enthusiasts – Other Activities

	PERFORMANCE ENTHUSIASTS
Adults 18+	*1.1 million*
Zoos	50%
Botanical gardens	48%
Aquariums	45%
Planetariums	30%
Casinos	31%
Horse races	16%
Auto races	12%

Source: Special TAMS Tabulations, pages 10-3/5.

3.4.4 Outdoor Activities

Of the outdoor activities used to define the CTC's *Soft Outdoor Adventure Enthusiast* market segment, hiking and backpacking in wilderness settings is the most popular among Performing Arts Tourism Enthusiasts (45%). About one-third of these performance seekers also claim to go cycling and kayaking or canoeing. Motor boating, alpine and cross-country skiing also have followings within the Performing Arts Tourism Enthusiast market, attracting about one-quarter of these Canadians.

Table 13: Canadian Performing Arts Tourism Enthusiasts – Outdoor Activities Used To Define Soft Outdoor Adventure Market Segment

	PERFORMANCE ENTHUSIASTS
Adults 18+	*1.1 million*
Hiking/backpacking in wilderness settings	45%
Cycling	37%
Kayaking or canoeing	34%
Cross-county skiing	27%
Motor boating	26%
Downhill skiing	26%
Horseback riding	17%
Sailing	17%
Snowmobiling	6%
Wind surfing	6%
Snowboarding	5%
Motorcycling	3%
Hot air ballooning	1%

Source: Special TAMS Tabulations, page 9.

Other outdoor activities have even greater appeal to Performing Arts Tourism Enthusiasts. They tend to be encounters with the outdoors that are less strenuous than those used to define Soft Outdoor Adventure Enthusiasts – activities such as wildlife (50%) and wildflower viewing (49%).

Fishing and golfing attract about one-third of these performance goers, with slightly fewer who claim to go bird watching or whale watching while on their travels over the past couple of years.

Table 14: Canadian Performing Arts Tourism Enthusiasts – Other Outdoor Activities

	PERFORMANCE ENTHUSIASTS
Adults 18+	*1.1 million*
Wildlife viewing	50%
Wildflowers / flora viewing	49%
Golfing	33%
Fishing	31%
Bird watching	28%
Whale watching	26%
Seeing northern lights/ other artic experiences	15%

Source: Special TAMS Tabulations, pages 9-1/3.

3.4.5 Activities At Home

In addition to capturing information on what Canadian travellers do while on their trips, TAMS provides information on the types of activities they engage in on a frequent or occasional basis in their home communities. The "at home" activities presented here are those that correspond to the cultural activities used to define Heritage, Visual and Performing Arts Enthusiast market segments.

Table 15: Canadian Performing Arts Tourism Enthusiasts – Frequent/Occasional Activities At Home

	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	PERFORMANCE ENTHUSIASTS
Adults 18+	*14.0 million*	*1.1 million*
Live theatre	43%	85%
Music concerts	47%	76%
Art gallery/art show	32%	71%
Museum	39%	66%
Zoo/botanical garden	38%	59%
Ballet	9%	33%
Opera	9%	30%
Casino	15%	14%

Source: Special TAMS Tabulations, pages 20; 38.

Performing Arts Tourism Enthusiasts seek a variety of cultural activities *at home* at appreciably higher rates than does the "typical" Canadian traveller. For example, more than three-quarters go to live theatre performances (85%) and music concerts (76%), and almost as many go to art galleries or art shows (71%) frequently or occasionally when in their home communities. Two-thirds of them say they go to local museums frequently or occasionally (66%). These levels of cultural activity in the home community are at least twice the levels exhibited by typical Canadian travellers.

Although the proportions are appreciably smaller, Performing Arts Tourism Enthusiasts also go to ballet (33%) and opera (30%) at rates that are between three and four times *higher* than does the typical Canadian tourist.

These findings suggest that local cultural attractions including theatres, other performance venues, museums and art galleries, along with zoos and botanical gardens may prove to be very useful communication routes for *reaching* potential performing arts tourists with messages about performance-oriented travel opportunities in Canada. They also support the finding that Torontonians are so heavily over-represented among Performing Arts Tourism Enthusiasts. These urban dwellers have many opportunities in their city and its immediate environs (e.g., Stratford, Shaw theatre festivals) to take in concerts, theatre, dance and music performances. The findings speak to the importance of *local availability* to build a tourism market of Canadians who are interested in performances when they travel.

3.5 Ratings of Canada

Performing Arts Tourism Enthusiasts were asked to rate Canada on a variety of dimensions using a ten point bi-polar scale ranging from *agree completely* (10) to *disagree completely* (1). Average ratings are shown in the accompanying table and are based on those who volunteered a score for a particular dimension. The table also displays the proportion of Canadians in the Performing Arts Tourism Enthusiast segment who refrain from offering an opinion.

In this context, Canada is most highly rated by domestic Performing Arts Tourism Enthusiasts for attributes that support an *outdoors* rather than a *cultural* or *urban* image:

- A place with beautiful scenery;
- One of best destinations for outdoor activities;
- A great place to relax and get away from it all;
- A place with lots of things for families to see and do;
- A place with lots of things for mature adults to see and do.

Performance-goers also rate Canada favourably for being a good *fishing* destination, a *summer* destination, being *safe*, having *friendly people*, and for being *clean and well cared for* and for its many *cultural events and attractions*.

Less favourable ratings are accorded attributes associated with shopping opportunities, as a place to experience city life, to experience Aboriginal culture, for respecting the natural environment, as a winter destination, as a place for romance, value for money and for experiencing the "good life". Canadians in the Performing Arts Tourism Enthusiast segment are least positive about their country as a destination with a popular or trendy image.

Since many members of this market segment are residents of Canada's major cities, it may be surprising that they express no more enthusiasm for Canada's urban spaces (7.8 on a ten point scale) than do Canadian travellers as a whole (7.7 on a ten point scale). This finding may be explained by the large number of Performing Arts Tourism Enthusiasts who have likely been exposed to a wide range of urban environments worldwide, either because they were born outside Canada or because of their strong propensity to travel to Europe and other countries.

Table 16: Canadian Performing Arts Tourism Enthusiasts – Attitudes Toward Canada

	Recent Leisure Travellers in Canada		
	Total	Performance Enthusiasts	
Adults 18+	*14.0 million*	*1.1 million*	
	Average #	Average #	Can't Rate %
Beautiful scenery	9.1	9.2	1%
One of best destinations for outdoor activities	8.7	8.9	3%
Great place to relax	8.6	8.7	5%
Lots for families	8.6	8.6	5%
Lots for mature adults	8.5	8.5	8%
Great place for fishing	8.5	8.4	23%
One of best summer destinations	8.4	8.4	2%
Safe for visitors	8.3	8.4	2%
Place with friendly people	8.2	8.4	2%
Clean/well cared for	8.3	8.3	2%
Many cultural events & attractions	8.0	8.3	4%
Great place to experience adventure & excitement	8.1	8.2	12%
Lots for young adults	8.1	8.2	11%
Great place for hunting	8.3	8.1	39%
Great place to see historic sites	8.0	8.0	3%
Place with interesting shops	7.8	7.9	7%
Great place to experience city life	7.7	7.8	4%
Great place to experience different cultures	7.7	7.8	5%
Great place for Aboriginal culture	7.5	7.8	11%
Respects natural environment	7.7	7.8	4%
One of best winter destinations	7.5	7.8	5%
Place for romance	7.4	7.5	17%
Offers excellent value for money	7.1	7.5	4%
Great place to experience "good life"	7.4	7.4	7%
Popular, trendy place	6.8	6.9	13%

*Source: Special TAMS Tabulations, Table 14. Average ratings are based on those rating Canada on a ten point bi-polar scale ranging from 10 "agree completely" to 1 "disagree completely". *Less than 0.5%.*

3.6 Ways to Reach Performing Arts Tourism Enthusiasts

There are several measures within TAMS that may help marketers reach Performing Arts Tourism Enthusiasts with their messages:

- Print media read on a regular basis;
- Television programs viewed regularly; and
- Club and association memberships.

Canadians in the Performing Arts Tourism Enthusiast segment are avid local newspaper readers (87%). Furthermore, half of them claim to read the travel section of weekday editions of daily newspapers on a regular basis and about three-fifths claim to read or look through the travel section of the weekend editions of a local newspaper.

Table 17: Canadian Performing Arts Tourism Enthusiasts – Print Media Read Regularly

	PERFORMANCE ENTHUSIASTS
Adults 18+	*1.1 million*
Daily Newspaper (Any)	**87%**
Weekday edition	76%
Travel section of weekday edition	53%
Weekend edition	77%
Travel section of weekend edition	61%
Community newspapers	83%
Any Magazines	**95%**
News magazines	65%
Hobby magazines	46%
Fashion/homemaking magazines	46%
Travel magazines	45%
Canadian or National Geographic	40%
General interest/city life magazines	38%
Sports magazines	23%

Source: Special TAMS Tabulations, page 15.

Performance-goers are avid magazine readers (95%). The most widespread regular readership is captured by *news* magazines, *hobby* and *fashion* magazines, followed closely by *travel* magazines and Canadian or National Geographic.

Daily and weekend newspapers may have better reach among Performing Arts Tourism Enthusiasts than does any particular type of television programming. Almost three-quarters of these tourists say they watch televised movies on a regular basis and approximately two-thirds claim to watch evening dramas and sitcoms regularly. Slightly fewer view the early evening news, nature shows or the late evening news on a regular basis. Just over half say they watch instructional/hobby shows, but noticeably fewer are regular viewers of professional sports broadcasts.

Table 18: Canadian Performing Arts Tourism Enthusiasts – Television Programs Viewed Regularly

	PERFORMANCE ENTHUSIASTS
Adults 18+	*1.1 million*
Movies	72%
Evening drama	63%
Evening sitcoms	63%
Early evening news	60%
Nature shows	59%
Late evening news	56%
Instructional/hobby shows	53%
Professional sports	44%
Morning news	29%
Daytime programs on weekdays	22%

Source: Special TAMS Tabulations, page 17.

Even though many Performing Arts Tourism Enthusiasts go to cultural activities in their home communities on a frequent or occasional basis, far fewer of these Canadians claim to be members of an art gallery or museum, a zoo or botanical garden. Half of them are, however, members of an auto club (e.g., CAA). Since most Canadians drive to their destinations in Canada, this type of organization may offer marketers a viable communications conduit to this market.

Table 19: Canadian Performing Arts Tourism Enthusiasts – Club/Organization Memberships

	PERFORMANCE ENTHUSIASTS
Adults 18+	*1.1 million*
Auto club	50%
Sports club	35%
Nature organization	17%
Art gallery/museum	14%
Zoo/botanical garden	3%
Gardening club	4%

Source: Special TAMS Tabulations, page 18.

4. Projections to 2026

4.1 Introduction

In 2000, there were approximately 23.3 million Canadians 18 years of age or older. Statistics Canada projects that this number will increase to 29.6 million by the year 2026, for an increase of 27 per cent. When this population increase is applied to the TAMS data, estimates of market size and characteristics in 2026 can be estimated, assuming that people in various age, gender and regional groups behave in 2026 as they did in 2000.

Because the population will not grow at the same rate among all age groups or in all regions of Canada, tourism businesses and marketers should anticipate and prepare for changes in travel activities and interests in the domestic market over the next two decades. In this chapter, some important structural shifts are described for Canada as a whole. Subsequently, expected change in the domestic Performing Arts Tourism Enthusiast market is discussed.

4.2 An Aid to the Reader

The accompanying table and text are provided to aid the reader in interpreting the columns shown in the summary tables included in this section.

Sample Table

Canada's Adult Population – Gender & Age

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
	2000	2026		
Adults (18+	*23.3 million*	*29.6 million*		
Men	49%	49%	27%	1%
Women	51%	51%	27%	-1%
18 - 34 years	31%	25%	0.47%	-98%
35 - 44 years	23%	17%	-7%	-124%
45 - 54 years	18%	16%	11%	-61%
55 - 64 years	12%	16%	77%	184%
65+ years	16%	26%	111%	309%

Source: Special TAMS Canada Tabulations, Table 1.

% of Adult Population In . . . 2000 Proportion of Canadian adults in 2000 who fit the demographic characteristic (e.g., age, gender, place of birth) or participate in a particular activity (e.g., travel to a particular destination; golf, ski , camp or go to a museum while on trips) now.
Example: 18 – 34 year olds represent 31 per cent of all Canadian adults, or 7.3 million of the 23.3 million Canadian adults (2000).

% of Adult Population In . . . 2026 Proportion of Canadian adults in 2026 who are projected to fit the demographic characteristic (e.g., age, gender, place of birth) or participate in a particular activity (e.g., travel to a particular destination; golf, ski, camp or go to a museum while on trips).
Example: 18 – 34 year olds are expected to represent 25 per cent of all Canadian adults, or 7.3 million of the 29.6 million Canadian adults (2026).

Growth Rate from 2000 to 2026 Anticipated rate of change in the number of Canadian adults who will fit the demographic or behavioural characteristic by 2026.
Example: the 7.3 million 18 – 34 year olds in 2026 is virtually identical to the 7.3 million 18 – 34 year olds in 2000.

Impact of 2026 Population Structure on Growth Rate How much the structure of the population projected for 2026 will influence the growth rate of a demographic or behavioural characteristic. Negative numbers suggest a downward pressure on growth rates and positive numbers represent an upward pressure. **Example:** the growth rate for 18 – 34 year olds (0.47%) will be 98 per cent lower than it would have been if the structure of the population had remained as it is was in 2000. Thus, if the population structure of 2000 were sustained to 2026, there would have been 9.2 million young adults in Canada, or 27 per cent more than there were in 2000 but changes in the population structure bring this number down to 7.3 million or the same number as there were in 2000, for a difference in the growth rate (0.47%/27%) of -98 per cent.

4.3 Regional Changes in the Canadian Market

The adult population in different parts of the country will change at different rates, with Atlantic Canada and Quebec experiencing the *lowest* growth rate (8% each) and British Columbia (49%) and Ontario (37%), followed by Alberta (33%) experiencing the highest growth rates. Manitoba and Saskatchewan will experience growth at a level that is substantively below the national average (14% versus 27%).

Quebec and Atlantic Canada will increase in population over the next two decades but they will do so at a rate of growth that is about two-thirds *lower* than would have occurred if the population structure of 2000 were to remain intact through 2026. In contrast, British Columbia will grow at a rate that is appreciably *higher* than would have been predicted based on today's population structure (81% higher).

Table 20: Regional Shifts in Canadian Adult Population

ADULTS 18+ IN MILLIONS	CANADIAN ADULT POPULATION IN . . . 2000	2026	GROWTH RATE FROM 2000 TO 2026	IMPACT OF 2026 POPULATION STRUCTURE ON GROWTH RATE
Total Canada	**23.3**	**29.6**	**27%**	
Atlantic Canada	1.8	2.0	8%	-69%
Quebec	5.8	6.2	8%	-70%
Montréal	2.7	3.7	38%	42%
Ontario	8.9	12.2	37%	35%
Toronto	3.6	6.1	70%	156%
Manitoba/Saskatchewan	1.6	1.8	14%	-49%
Alberta	2.2	2.9	33%	22%
British Columbia	3.0	4.5	49%	81%
Vancouver	1.5	2.4	57%	108%

Source: Special TAMS Canada Tabulations, Table 5.

Ontario residents will represent over two-fifths of all adult Canadians by 2026, experiencing a growth rate of 37 per cent – a rate that is approximately one-third higher than would be predicted based on the population structure of 2000.

Of particular note in projections of Canada's population growth is the increasing *urbanization* of the country.

- Even though Quebec's total population will grow from 2000 to 2026 by only eight percent, Montréal CMA's population is expected to grow at over four times this rate (38%), from about 2.7 million adults to 3.7 million.
- Growth for the Toronto CMA is expected to be even more meteoric – the adult population of this city is expected to grow from 3.6 million to 6.1 million in 2026, for a growth rate of 70 per cent – almost twice the provincial average (37%) or 1.5 times higher than would be expected given today's population structure (156%).
- Vancouver CMA will also grow at a rate (57%) that is higher than the rate predicted for the province (49%), from 1.5 million in 2000 to 2.4 million in 2026.

As Canada becomes increasingly urbanized, it may become a growing challenge to lure city residents to events and sites outside of cities, including Aboriginal performances and cultural experiences. The growth of Canada's cities will also be fed by *new Canadians* at a much higher rate than will growth in other community sizes. Because new Canadians are less likely to travel within Canada than are their Canadian-born counterparts, additional challenges may be encountered in attracting immigrants to performances and related tourism activities within their new country.

4.4 Demographic Changes in the Canadian Market

Changes to the demographic profile of Canadians over time are apt to have an especially dramatic impact on Canada's tourism volume and value, and the types of activities the domestic market will seek on its travels.

4.4.1 Gender & Age

There will be a noticeable decline in the proportion of the population that is young or middle-aged, and a substantive increase in the proportion that is older.

- The 18 to 34 year old age group will decline from 1-in-3 to 1-in-4 adult Canadians by 2026;
- Canadians in their "family" years (35 – 44) will fall from over 1-in-5 members of the adult population to about 1-in-6;
- Middle-aged Canadians (45 – 54) will come close to holding steady as a proportion of the total population, from 18 per cent in 2000 to 16 per cent in 2026;
- Starting at about age 55, the pattern shifts with older people representing *higher* proportions of Canada's adult population in 2026 than they do now. The increase is most prominent among Canadians 65 years of age or older. This older group currently represents about one-sixth of the adult population but by 2026 it is expected to represent over one-quarter.
- In absolute numbers, the young adult population (18 – 34 years) will shift from 7,252,000 to 7,286,000 between 2000 and 2026. This young cohort is growing at a rate that is 98 per cent lower than would have been expected if the structure of the population had remained constant between 2000 and 2026. Thus, the impact of changes in the population mix in Canada will reduce the growth rate of the younger age segment substantively. A similar finding is evident for other younger and middle-aged cohorts. In the case of the "family market", not only is the growth rate much lower than would be expected based on today's population structure, but there will be a decrease in the absolute numbers of Canadians in the 35 to 44 year age bracket – from 5,313,000 in 2000 to 4,960,000 in 2026.

Table 21: Canadian Adult Population – Gender & Age

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
	2000	2026		
Adults 18+	*23.3 million*	*29.6 million*		
Men	49%	49%	27%	1%
Women	51%	51%	27%	-1%
18 - 34 years	31%	25%	0.47%	-98%
35 - 44 years	23%	17%	-7%	-124%
45 - 54 years	18%	16%	11%	-61%
55 - 64 years	12%	16%	77%	184%
65+ years	16%	26%	111%	309%

Source: Special TAMS Canada Tabulations, Table 1.

As noted above, the trend reverses in the older age groups. In fact, the oldest segment of the population – adults who are at least 65 years of age – will represent close to twice as many Canadians by 2026 as they do now, or 7.7 million instead of the current 3.7 million.

4.4.2 Household Income & Education

The proportion of Canadian adults with household incomes in various groups from *low* to *high income* are not expected to change substantively between now and 2026. Nonetheless, reflecting the increase in new Canadians and in the number of Canadians no longer in the labour force, *low income* Canadians will grow at a higher rate (37%) than will the population as a whole (27%).

Table 22: Canadian Adult Population – Household Income & Education

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
	2000	2026		
Adults 18+	*23.3 million*	*29.6 million*	*27%*	
Household Income				
Low Income	47%	51%	37%	36%
Low - Middle	23%	22%	19%	-30%
Middle – High	21%	19%	15%	-46%
High Income	9%	8%	15%	-46%
Education				
Some Secondary or Less	20%	11%	-29%	-206%
Completed Secondary	26%	28%	37%	34%
Some Post Secondary	36%	40%	44%	62%
Graduated University	18%	20%	42%	54%

Source: Special TAMS Canada Tabulations, Table 3. Repercentaged on total stating income. Incomes are expressed in 1998 dollars.

As the youth market declines, the number of young people who are still in secondary school will also decline. Apart from this substantive change, a slightly higher proportion of Canada's adult population will have some post-secondary education or a university diploma in 2026 than they have now.

4.4.3 Household Composition

The 2026 age mix of Canadians will have a substantive impact on the types of activities they are interested in pursuing on their travels because as they age, they will become more concentrated in adult-only households. The family market – households in which there are children twelve years of age or younger – will decline from 1-in-3 in 2000 to 1-in-4 by 2026. Conversely, those who live in adult-only households (no children or teenagers) will increase from 66 per cent to 74 per cent.

Table 23: Canadian Adult Population – Household Composition

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
	2000	2026		
Adults 18+	*23.3 million*	*29.6 million*		
Adult Only	66%	74%	42%	54%
Any Teens/Children	33%	26%	-2%	-107%
Any Children under 12	25%	19%	-1%	-105%

Source: Special TAMS Canada Tabulations, Table 4. Percentages may not add to 100% due to rounding and/or duplication across categories.

4.4.4 Place of Birth

Assuming present immigration policies, the proportion of Canadian adults who will have come to Canada from other countries will reach 28 per cent in 2026 from the current 21 per cent. As noted earlier, Canada's major cities will be the reception centres for many of the country's new residents. By 2026, over half of Toronto's population will be new immigrants (54%). The same scenario will be in place for Vancouver (53%). An appreciably lower proportion of the Montréal population will be new Canadians by 2026 (28%) but this proportion is noticeably higher than the current level (20%) in this city. As noted elsewhere in this report, an especially high proportion of Performing Arts Tourism Enthusiasts are *new Canadians* (24%). Assuming that the current patterns persist over the next two decades, the growth in immigrants will likely have a positive impact on the size of this market . . . but in light of their comparative enthusiasm for destinations *outside* Canada, may not result in commensurate market growth for the performance sector *within* Canada.

Table 24: Canadian Adult Population – Place of Birth

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
	2000	2026		
Adults 18+	*23.3 million*	*29.6 million*		
Born in Canada	79%	72%	16%	-39%
Born Outside Canada	21%	28%	66%	144%

Source: Special TAMS Canada Special Tabulations.

4.5 Destination Choices

Over the next two decades, Canadians will continue to take leisure trips in Canada but will be increasingly drawn to destinations outside the country. In part because of increasing numbers of immigrants who travel to their country of origin and in part because the aging population will seek respite from Canada's winter, destinations in the U.S.A., Europe and other foreign countries will see increases in the proportion of Canadian tourists. Thus, as the population ages between 2000 and 2026, retention of Canadians for Canadian destinations will become an increasing challenge.

Table 25: Canadian Adult Population – Destinations Visited on Leisure Trips in Past Couple of Years

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
	2000	2026		
Adults 18+	*23.3 million*	*29.6 million*		
Canada	60%	59%	24%	-10%
U.S.A.	29%	32%	40%	47%
Sun/Sea Destinations	20%	21%	37%	36%
Mexico/Caribbean	8%	8%	27%	0%
U.K./Europe	8%	10%	59%	118%
Other Countries	6%	8%	60%	121%

Source: Special TAMS Canada. Tabulations, Tables 24 - 31.

4.6 Performing Arts Tourism Enthusiasts

As noted in the demographic profile section of this report, the Performing Arts Tourism Enthusiast market segment tends to attract both younger and older travellers. This group of Canadian tourists is also especially likely to live in adult-only households and to be foreign-born.

Because the Canadian population will shift over the next two decades towards an older and childless one, the very characteristics that define Performing Arts Tourism Enthusiasts help explain why growth in this market is predicted to be 98 per cent **higher** than would have been expected given today's population structure. The total domestic Performing Arts Tourism Enthusiast market is predicted to grow from 1.3 million in 2000 to 2.0 million by 2026.

A similar pattern is evident for changes in the Performing Arts Tourism Enthusiast segment that takes leisure trips within Canada. This population is expected to increase from 1.1 million now to 1.5 million in 2026. At 44 per cent, this growth rate is 61 per cent **higher** than would have been expected given today's population structure. Possibly reflecting the increasing proportion of new Canadians by 2026 and their comparative reluctance to travel *within* Canada, and the reliance of the performance segment on younger Canadians, the growth rate for performance tourists who will likely travel within the country (44%) is lower than is predicted growth for the segment as a whole (98%).

For purposes of contrast, the table below also displays predicted growth rates for other key CTC activity-based market segments. Clearly, segments such as Heritage Tourism Enthusiasts and Wine/Culinary Enthusiasts – segments that involve little physical exertion -- will grow at much higher rates than those such as Soft Outdoor Adventure Enthusiasts and winter sports participants. These differences undoubtedly reflect the needs and interests of an aging Canadian population.

Table 26: Canadian Adult Population – High Intensity Activity Groups

Adults 18+ in Millions	% of Adult Population In . . . 2000	2026	Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
Total Canadian Adult Population	23.3	29.6	27%	
Total Performing Arts Enthusiasts	1.3	2.0	54%	98%
Performing Arts Enthusiasts Who Take Leisure Trips in Canada	**1.1**	**1.5**	**44%**	**61%**
Other CTC Activity Groups - Leisure Trips in Canada				
Heritage Enthusiasts	2.2	3.0	37%	36%
Soft Outdoor Adventure Enthusiasts	4.4	4.8	9%	-66%
Hard Outdoor Adventure Enthusiasts	1.3	1.4	9%	-66%
Alpine Skiing	2.4	2.6	9%	-67%
Other Winter Outdoors	3.1	3.4	11%	-61%
Visual Arts Enthusiasts	1.7	2.4	39%	43%
Wine/Culinary Enthusiasts	1.5	2.0	36%	32%

Source: Special TAMS Canada Special Calculations

5. Appendix

5.1 TAMS Definitions

The Travel Activities and Motivation Survey (TAMS) An association of Canadian tourism ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of leisure travel among Canadians and Americans. This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators, and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada.

TAMS consisted of both a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents 18 years of age or over were selected randomly within the household. People participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mailback questionnaire. Usable questionnaires were received from 5,490 Canadians and 6,405 (26.0 %) U.S. respondents.

Projections to the TAMS Data Base The Canadian population 18 years of age or older was projected to the year 2026 and the corresponding USA population was aged to the year 2025. A special additional adjustment was made in the re-weighting of TAMS data to take into account an anticipated increase in the rate of educational achievement within the populations of both countries. In particular, it was assumed that the incidence of the highest level of education achieved in the period 1975 to 1999 represents a long term equilibrium of educational achievement. Figures for each sampling unit used in TAMS were supplied for aging the Canadian population and the USA by Ontario's Ministry of Tourism and Recreation (MTR). These projections included MTR's adjustments for increased educational achievement and immigration flows for Canada.

Activity Segments of Interest to the Canadian Tourism Commission

Following are the TAMS variables that were combined to create activity-based sub-markets of special interest to the Canadian Tourism Commission.

High Intensity Hard Outdoors - Took trip to experience adventure and excitement in past two years and minimum of two of the following activities if one activity is white water rafting; if no white water rafting, any one of: ice or rock climbing, mountain biking; dog sledding; hang-gliding; bungee jumping; heli-skiing; scuba diving. May include consumptive outdoor activities (hunting/fishing).

High Intensity Soft Outdoors - Minimum of two of the following from the TAMS "activities on trips in past two years" list and not already categorized as "High Intensity Hard Outdoor Adventure": recreational biking, biking as an overnight touring trip, any motorcycling, kayaking or canoeing, motor boating, sailing, wind surfing, hiking/backpacking, horseback riding, hot air ballooning, cross-county skiing, downhill skiing, snowboarding, any snowmobiling. May include consumptive outdoor activities (hunting/fishing).

High Intensity Wine/Culinary - Any of: Stay at cooking school, wine tasting school or gourmet restaurant with accommodation on the premises; or minimum of 2 of the following: touring a region's wineries; going to wineries for day visits; dining at internationally acclaimed restaurants.

High Intensity Performing Arts - At least one of experiences: different cultures/ways of life; experience city life; at least three of music festivals; literary festivals or events; theatre festivals; opera; ballet or other dance; theatre; classical music concerts; jazz music concerts; musical attractions such as Jazzland.

High Intensity Visual Arts - At least one of experiences: different cultures/ways of life; experience city life; at least two of art galleries; international film festivals; shop or browse – local arts & crafts studios.

High Intensity Heritage - At least one of experiences: different cultures/ways of life; visit historical sites/important places in history; participate in hands-on learning experience; at least four of Aboriginal cultural experiences in remote/rural setting; Pow Wow/other Aboriginal celebration; Aboriginal attractions; French Canadian cultural experiences; carnivals such as Caribana; western theme events; farmers' fairs or markets; local festivals or fairs; children's museums; general history museums; science or technology museums; historical replicas of cities/towns; historic sites; pick your own farms / harvesting.

Any Alpine - alpine skiers (alpine, heli skiing, snowboarding) and/or ski package.

Any Other Winter - Any of: ice climbing, dog sledding, ice fishing, snowmobiling, cross country skiing (any or as a touring trip) [excludes alpine skiers and snowboarders].

5.2 Unweighted Base Sizes

Table A-1: Activity-Based Market Segments: Unweighted Base Sizes From the Canada TAMS Mailback Questionnaire

	UNWEIGHTED RECORDS – MAILBACK
Adult Leisure Travellers in Canada in the Past 2 Years	4,272
Soft Outdoor Adventure Enthusiasts	1,241
Hard Outdoor Adventure Enthusiasts	361
Wine/Culinary Enthusiasts	454
Heritage Enthusiasts	762
Performing Arts Enthusiasts	**331**
Visual Arts Enthusiasts	608
Winter Outdoors (excluding alpine skiing)	844
Alpine Skiing	651

Source: Special TAMS Canada Tabulations, page 1.
Note: Segments are based on past two year leisure travel to a Canadian destination and participation in a pre-defined set of activities while on trips taken to any destination in the past two years

5.3 Attraction Rates

Table A-2: Attraction Rates

	Proportion of Canadian Adult Population	Proportion of Performance Enthusiasts Visiting . . . Region	Attraction Rate
Atlantic Canada	8%	24%	3.0
Quebec	25%	47%	1.9
Ontario	38%	63%	1.7
Manitoba/Saskatchewan	7%	12%	1.7
Alberta	9%	22%	2.4
British Columbia	13%	31%	2.4

Source: Special TAMS Canada Tabulations, special calculations.
Note: Proportion of segment visitors to Canada's regions will add to more than 100% because of visits to multiple provinces over the two-year reporting period.

5.4 Activities Measured in TAMS

Codes For NET Activities: TAMS

Bird watching
Whale watching
Other wildlife viewing
Wildflowers / flora viewing
Recreational biking
Mountain biking
Biking – as an overnight touring trip
Motorcycling – day excursions on an overnight touring trip
Motorcycling – as an overnight touring trip
Kayaking or canoeing
Motor boating
Sailing

Wind surfing

White water rafting

Ice climbing
Rock climbing

Dog sledding
Seeing northern lights or other arctic experiences
Fishing – fresh water
Fishing – salt water
Ice fishing
Working out in a fitness centre
Jogging outdoors

Going on picnics in park settings
Golfing – play an occasional game while on a trip

Golfing – stay at a golf resort for one or more nights
Golfing – take a packaged golf tour to play on various courses

Hang-gliding
Hiking or back-packing in wilderness settings
Horseback riding
Hot air ballooning
Hunting – big game
Hunting – birds or small game
Parachuting

Bungee jumping

Playing baseball or softball
Playing basketball
Going bowling
Playing chess or backgammon
Curling
Playing football
Playing ice hockey
Playing squash
Playing soccer
Playing tennis
Playing volleyball
Ice skating
In-line / roller skating

Professional football games (as a spectator)
Professional golf tournaments (as a spectator)
Professional ice hockey games (as a spectator)
Horse races

National or international sporting events such as the Olympic

Skiing – cross country
Skiing – cross country as an overnight touring trip
Skiing – downhill
Heli-skiing
Snowboarding
Snowmobiling – day use on organized trail
Snowmobiling – as an overnight touring trip
Sunbathing or sitting on a beach
Scuba diving
Swimming in lakes
Swimming in oceans
Aboriginal (e.g., Native American) cultural experiences in a remote or rural setting where you stayed for one or more nights
Pow Wows or other aboriginal (e.g., Native American) celebrations, such as the Wikwemikong Pow-Wow
Aboriginal (e.g., Native American) attractions such as the Indian Museum of North America in Arizona or the Polynesian Cultural Centre in Hawaii
French Canadian cultural experiences
Musical festivals such as the jazz festival in Montréal or the Chicago Blues Festival
International film festivals such as the Cannes Film Festival
Literary festivals or events
Theatre festivals
Carnivals such as Mardi Gras or Rio's Carnival
Western theme events, such as rodeos or the Calgary Stampede
Farmers' fairs or markets
Local festivals or fairs such as fall fairs, winter carnivals, Highland Games, Octoberfests, folklore festivals
Art galleries
Children's museums
General history or heritage museums

Science or technology museums such as the Smithsonian National Air and Space Museum
Opera
Ballet or other dance performances
Theatre
Concerts – classical
Concerts – jazz
Concerts – rock & roll / popular
Musical attractions such as the Rock 'n Roll Museum or Jazzland
Historical replicas of cities or towns with historic re-enactments such as Williamsburg
Historic sites such as Statue of Liberty, Acropolis or Fort Alamo
Movie theme parks like MGM studios
Science & technology theme parks like Epcot
Amusement parks like Disneyland
Garden attractions such as Cypress Gardens or Tivoli Park
Botanical gardens
Planetariums
Zoos
Aquariums
Natural wonders such as Niagara Falls or the Grand Canyon
Auto races (as a spectator)
Professional baseball games (as a spectator)
Professional basketball games (as a spectator)
Professional figure skating (as a spectator)
Scenic day or evening tours by boat
Scenic day tours by train
Going to wineries for day visits and tastings
BUSINESS ACTIVITIES
(WHILE ON A TRIP OF ONE OR MORE NIGHTS)
Attend business meetings out of town

Games (as a spectator)
Amateur sports / arts / hobby tournaments and competitions (as a spectator or participant)
Recreational dancing
Casinos
Local outdoor cafes
Movies
Restaurant dining – regional or local cooking
Restaurant dining – internationally acclaimed restaurants
Shop or browse – bookstores or music stores
Shop or browse – antiques
Shop or browse – gourmet foods in retail stores or farms
Shop or browse – local arts & crafts studios or exhibitions
Shop or browse – clothing, shoes and jewellery
Pick-your-own farms or participating in harvesting
Read for relaxation or personal interest (while on trip)
Camping – in large public campgrounds in national, state or provincial parks
Camping – in campgrounds outside national, state or provincial parks
Camping – in wilderness settings
Staying at a lakeside resort in summer
Staying at a lakeside resort in winter
Staying at a ski resort or mountain resort in summer
Staying at a ski resort or mountain resort in winter

Staying at a seaside resort in summer
Staying at a seaside resort in winter
Staying at a remote or fly-in lodge
Staying at a remote or fly-in outpost

Staying at a wilderness lodge you can drive to by car
Staying at a private cottage or condo you own
Staying at a private cottage or condo you rent
Staying at a cooking school with accommodation on the premises
Staying at a wine tasting school with accommodation on the premises
Staying at a gourmet restaurant with accommodation on the premises
Staying at a health spa
Staying at a working farm or guest ranch
Staying at a bed & breakfast
TOURING AND CRUISING (OVERNIGHT)
Guided scenic tours in the countryside, like fall colour tours where you stay one or more nights
Wandering around small towns and villages where you stay one or more nights
Touring a region's wineries where you stay one or more nights
Great Lakes cruises where you stay on board one or more nights
Submarine "cruises" where you stay on board one or more nights
Ocean cruises where you stay on board one or more nights
DAY TOURING
(WHILE ON A TRIP OF ONE OR MORE NIGHTS)
Coastal or lakeshore scenic drives in your own / rental vehicle
Guided bus day tours in a city
Scenic day tours in the countryside by bus
Scenic day tours by air

Attend trade shows out of town

Attend business conventions out of town
Attend conferences or seminars out of town
Attend company paid training out of town
Take a vacation paid for by your company (Incentive Travel)

Q.3 Getaways/Q. 8 Vacations
Took at least 1 trip in the **winter**
Took at least 1 trip in the **spring**
Took at least 1 trip in the **summer**
Took at least 1 trip in the **fall**

Q. 6 Getaways/Q.11 Vacations Use in Past 2 Years
Homes of friends & relatives
Hotels / Resorts / Country Inns

Motels

Bed & Breakfasts
Cottage, rented
Cottage, your own
Fishing or Hunting Lodges
Campgrounds / RV Parks – Fully serviced (water, sewer, electricity)
Campgrounds / RV Parks – Electricity only
Unserviced campgrounds or backcountry
Other
IF CAMPING:
What type of camping equipment did you use ***most often***?
Tent
Tent Trailer
Truck camper or van
Travel Trailer / Fifth wheel
Motorhome

Q. 15 – Package Used in past two years

Motorcoach touring package
A resort or cruise package
A theatre package
An adventure package
A ski package

A city package

An educational package
Some other type of package
Travel to Ontario
Ever
Never