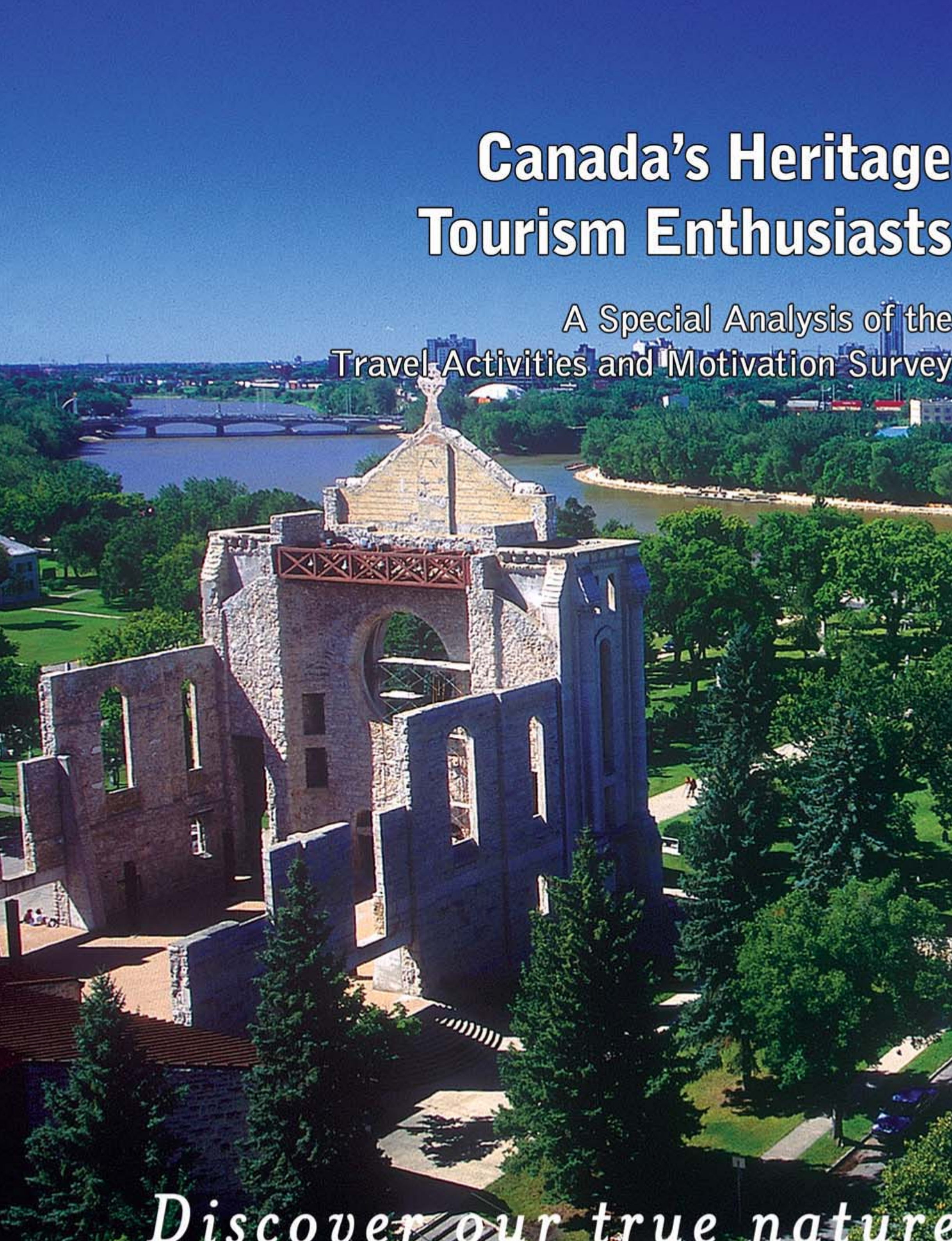
Canada's Heritage Tourism Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey



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Canada

Canada's Heritage 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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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 **Heritage Tourism Enthusiasts** – Canadians who have taken leisure trips in Canada and exhibit a particular interest in heritage-oriented activities 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 and have included at least four of the following activities on these trips.

- Aboriginal cultural experiences in a 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

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

In addition to a *current* profile of Heritage 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. The final chapter of this report is devoted to the impacts of population changes on the domestic Heritage 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, Performing Arts Enthusiasts, Wine and Culinary Enthusiasts, and Winter Outdoor Activity Participants.

2. Executive Summary

2.1 Heritage Tourism Enthusiasts: Market Size

Of the 23.3 million Canadian adults in 2000, about 2.6 million are Heritage Tourism Enthusiasts (11%). 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 heritage products is approximately 2.2 million adults.

Canadians from all parts of the country are represented in the Heritage Tourism Enthusiast segment. With some variations, they mirror the adult population distribution of Canada as a whole. Variations include Quebec and Ontario. Quebec represents one-quarter (25%) of the Canadian adult population but only one-sixth of heritage enthusiasts (17%). Conversely, Ontario residents are over-represented within the Heritage Tourism Enthusiast segment (42%) compared to their proportion of Canada as a whole (38%).

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 -- Ontario, Quebec and British Columbia -- achieve the highest share of Heritage Tourism Enthusiasts. Smaller numbers of Canadians live in Atlantic Canada, Alberta and Manitoba/Saskatchewan and, as a consequence, lower proportions of Heritage Tourism Enthusiasts claim to have taken leisure trips to these destinations in the past couple of years: Atlantic Canada (28%), Alberta (30%) and Manitoba/Saskatchewan (17%).

Some regions can be said to have particularly high "attraction rates" compared to others because they lure high levels of Heritage Tourism Enthusiasts relative to their resident populations. Those that are especially successful in attracting Heritage Tourism Enthusiasts over a two year period relative to their share of the Canadian adult population include Atlantic Canada (3.5), Alberta (3.3) and, to a lesser extent, British Columbia (2.8). About three times as many Heritage Tourism Enthusiasts claim to have visited these regions than their share of the total adult population would suggest.

Ontario is the least successful in attracting domestic heritage tourists relative to its population – this province represents 38 per cent of the country's adults and 54 per cent of Heritage Tourism Enthusiasts, for an "attraction rate" of 1.4. Quebec falls between the high levels evident for Canada's eastern and western regions, representing 25 per cent of the adult population and attracting 44 per cent of Heritage Tourism Enthusiasts over a two year period, for a 1.8 "attraction rate".

The U.S.A., followed at a considerable distance by the United Kingdom and other European countries are strong competitors as destinations among Heritage Tourism Enthusiasts.

2.2 Heritage Tourism Enthusiasts: Demographic Characteristics

Compared to the total market for all leisure tourism experiences over the past couple of years, domestic Heritage Tourism Enthusiasts are substantively under-represented among younger Canadians, and especially among those between 18 and 34 years. This age group represents 1-in-3 domestic travellers as a whole (33%) but only 1-in-4 Heritage Tourism Enthusiasts (25%).

Most Heritage Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. About one-third are likely to be in the market for heritage tourism experiences that take into account the interests and needs of teenagers or children (34%).

Heritage Tourism Enthusiasts are also somewhat more affluent than is the "typical" domestic traveller in Canada, with an average household income of $60,000 compared to $54,900 for the typical leisure visitor in Canada (1998 dollars). Higher household incomes are consistent with higher levels of formal education: over one-quarter of Heritage Tourism Enthusiasts have at least one university degree (28%) and a further 42 per cent have had some post-secondary education.

2.3 Heritage Activities among Heritage Tourism Enthusiasts

By definition, Heritage Tourism Enthusiasts participate in multiple heritage-related 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 heritage activities – sought by between one-half and one-third of these tourists while on a trip in the past couple of years – span museums, farmers' markets, festivals and historic sites.

Activities Engaged in by more than 30 per cent of Heritage Tourism Enthusiasts:

- General history museums (86%)
- Farmers' fairs or markets (67%)
- Local festivals or fairs (65%)
- Science & tech museums (58%)
- Historic sites (55%)
- Historical replicas of cities/towns (54%)
- Pick your own farms / harvesting (39%)
- French Canadian cultural experiences (31%)

Other heritage activities that attract between 10% and 30% of Heritage Tourism Enthusiasts include children's museums, western theme events such as the Calgary Stampede, and Aboriginal cultural experiences or attractions.

Activities Engaged in by 10% to 30% of Heritage Tourism Enthusiasts:

- Children's museums (25%)
- Western theme events (19%)
- Aboriginal cultural experiences (18%)
- Aboriginal attractions (16%)

2.4 Overlap With Other Activity-Based Segments

Canadian Heritage Tourism Enthusiasts with recent leisure travel experiences in their own country have relatively wide-ranging tourism interests, with a particular emphasis on the *outdoors*.

The 2.2 million Heritage Tourism Enthusiasts share the travel interests of Visual Arts Enthusiasts – two-fifths are also in this market segment (858,000) and, to a lesser extent with Performing Arts Enthusiasts (26%, or 568,000). They are also likely to seek outdoor adventure tourism activities on their travels (40%, or 864,000) including alpine skiing (24%, 526,000) and other winter outdoor activities (35%, 753,000).

These overlaps suggest considerable opportunities for cross-market packaging and promotion of indoor and outdoor tourism products within the domestic Heritage Tourism Enthusiast market.

2.5 Image Challenges & Media Sources

Even though they are Heritage Tourism Enthusiasts, these Canadians proffer their highest ratings of Canada for attributes that are associated with the *outdoors*:

- 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 great place for fishing
- A place with lots of things for mature adults to see and do
- One of best summer destinations

Ratings for having many cultural attractions and events and seeing important historical sites and significant places in history, along with being a place to experience different cultures and ways of life, while relatively favourable, fall below the more outdoor-oriented characteristics highlighted above. These heritage and culture-oriented attributes achieve parity or, more commonly, lower levels of support from Heritage Tourism Enthusiasts than do experiencing adventure and excitement, being safe for visitors, being clean and well cared for, friendliness, and a destination with a lot for young people to see and do.

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

Image building and product awareness messages to Heritage Tourism Enthusiasts 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). These media outlets have the greatest potential for reaching Heritage Tourism Enthusiasts among those measured in the survey.

2.6 Impacts of Population Changes

Three fundamental changes in Canada's population structure might be taken into account in tourism planning and product development for domestic Heritage 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 Heritage Tourism Enthusiasts

There will be an increase in the absolute number of Canadians who will be in the market for heritage activities between 2000 and 2026, from an estimated 2.6 million now to about 3.7 million in 2026. Canada's likely share of this market – those who will seek heritage experiences and take leisure trips within Canada – is also expected to grow from 2.2 million to 3.0 million.

These growth rates are *higher* than the population growth rate of Canada as a whole, primarily because heritage activities tend to appeal to older people and to those who are born outside Canada. Just as the older end of the age spectrum will increase as a proportion of the total population over the next two decades, so too will the market for heritage tourism, so long as changes are made in the amenities and services offered by tourism businesses who serve this market segment to accommodate the needs and interests of an increasingly aging population.

And just as the proportion of new Canadians *increases* over the next two decades, so too will the market for heritage activities. It is not, however, a foregone conclusion that these new heritage tourists will seek fairs, festivals, museums and cultural events *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 heritage tourism products, new Canadians may require special cultural amenities (e.g., language, dietary needs, religious observances, etc.) to encourage them to explore *Canada's* heritage products.

2.8 Summary

The domestic Heritage Tourism Enthusiast market for Canada is characterized by its concentration in older age groups, its affluence and its high level of post-secondary education.

Cultural activities with the greatest appeal to these tourists include museums, festivals, fairs and markets.

Of the market segments of special interest to the CTC, domestic Heritage Tourism Enthusiasts currently represent the largest *cultural* pool of potential visitors for Canada's heritage tourism businesses – 2.6 million adult Canadians. Of this sizeable pool, over 8-in-10 have taken recent leisure trips in Canada (2.2 million), leaving some opportunity for growth. Segments that attract more Canadians than heritage include soft adventure outdoors and winter sports participants.

The strong link between Heritage Tourism Enthusiasts and outdoor enthusiasts creates cross-marketing and packaging opportunities with outdoor products. Such opportunities may have to recognize the need for varying levels of physical exertion so that tourism businesses can continue to attract the energetic, action-oriented youth and family markets but can also attract the increasing number of older Canadians who may retain their interest in the outdoors but will require gentler outdoor experiences.

The potential domestic market has considerable growth potential over the next two decades, in large part because it appeals to older Canadians – the segment that will experience the greatest "growth spurt" between now and 2026.

Additional growth opportunities for Heritage Tourism Enthusiasts may come from the increase in the proportion of new immigrants to Canada. New Canadians exhibit a strong tendency to seek heritage experiences when they travel . . . but they are more reticent than Canadian-born residents to visit *Canadian* destinations. The heritage 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.

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

3. Canadian Heritage 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 Heritage Enthusiasts, Hard and Soft Outdoor Adventure Enthusiasts, Wine and Culinary Enthusiasts, Alpine Skiers, Other Winter Activity Participants (non-alpine), Visual Arts Enthusiasts, and Performing 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 Heritage Tourism Enthusiast segment.

Of the 23.3 million Canadian adults in 2000, about 2.6 million are Heritage Tourism Enthusiasts (11%). 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 heritage products is approximately 2.2 million adults.

Table 1: Canadian Heritage Tourism Enthusiasts
Market Size & Comparisons With Other Segments

	CANADIAN ADULTS	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	TOTAL	HERITAGE ENTHUSIASTS
Adults 18+	*23.3 million*	*14.0 million*	*2.2 million*
Heritage	**2.6**	**2.2**	**2.2**
Wine/Culinary	1.8	1.5	0.5
Performing Arts	1.3	1.1	0.6
Visual Arts	2.1	1.7	0.9
Soft Outdoor Adventure	5.3	4.4	0.9
Hard Outdoor Adventure	1.6	1.3	0.4
Winter Outdoors (excluding alpine skiing)	3.6	3.1	0.8
Alpine Skiing	2.8	2.4	0.5

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

At 2.6 million, these Heritage Tourism Enthusiasts represent more Canadians than do other culture-based market segments of special interest to the CTC, e.g., Performing and Visual Arts Enthusiasts. Heritage tourists are, however, a smaller market segment than those oriented to outdoor adventure in general, and to the outdoors during the winter.

The 2.2 million Heritage Tourism Enthusiasts with recent Canadian leisure travel experiences share interests of Visual Arts Enthusiasts – two-fifths are also in this market segment (858,000) and, to a lesser extent with Performing Arts Enthusiasts (26%, or 568,000). They are also likely to seek outdoor adventure tourism activities on their travels (40%, or 864,000) including alpine skiing (24%, 526,000) and other winter outdoor activities (35%, 753,000). These overlaps suggest considerable opportunities for cross-market packaging and promotion of indoor and outdoor tourism products within the domestic Heritage 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 3.3 million Canadians – the Heritage Tourism Enthusiast segment represents about one-fifth. 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 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 in the Heritage Tourism Enthusiast segment and with some variations, mirror the adult population distribution of Canada as a whole. For example, 1-in-12 Canadians live in Atlantic Canada and the same proportion of Heritage Tourism Enthusiasts live in these four provinces (8%). Quebec represents one-quarter of the Canadian adult population but only one-sixth of heritage enthusiasts (17%) are residents of this province. Conversely, Ontario residents are over-represented within the Heritage Tourism Enthusiast segment (42%) compared to their proportion of Canada as a whole (38%).

Table 3: Place of Residence of Canadian Heritage Tourism Enthusiasts

	CANADIAN ADULTS	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	TOTAL	HERITAGE ENTHUSIASTS
Adults 18+	*23.3 million*	*14.0 million*	*2.2 million*
Atlantic Canada	8%	8%	8%
Quebec	25%	24%	17%
Montréal CMA	12%	11%	10%
Ontario	38%	35%	42%
Toronto CMA	16%	12%	17%
Manitoba/Saskatchewan	7%	8%	6%
Alberta	9%	11%	13%
British Columbia	13%	15%	14%
Vancouver CMA	7%	7%	7%

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

Manitoba/ Saskatchewan and British Columbia residents are represented in the Heritage Tourism Enthusiast market about on par with their share of the total population. A marginally higher proportion of these tourists are from Alberta (13%) than would be expected based on Alberta's contribution to the total Canadian population (9%).

The comparative under-representation of Quebec is more likely to be a function of Quebeckers *outside* of Montréal electing not to participate in heritage activities when they travel since under-representation for the province as a whole (25% of Canada's adult population and 17% of Heritage Enthusiasts) is appreciably more dramatic than is the case for the Montréal CMA (12% of Canada's adult population and 10% of Heritage Enthusiasts). The over-representation of Ontario within the Heritage Tourism Enthusiast market is reflected in participation rates for the province as a whole (38% of Canada's adult population and 42% of Heritage Enthusiasts) and for the Toronto CMA (16% of Canada's adult population and 17% of Heritage Enthusiasts).

Canadians in the Heritage 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 (54%), followed at a relatively wide distance by Quebec (44%), and less commonly, British Columbia (36%). 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 Heritage Tourism Enthusiasts. Smaller numbers of Canadians live in Atlantic Canada, Alberta and Manitoba/Saskatchewan and, as a consequence, lower proportions of Heritage Tourism Enthusiasts claim to have taken leisure trips to these destinations in the past couple of years: Atlantic Canada (28%), Alberta (30%) and Manitoba/Saskatchewan (17%) than is the case with the more populous provinces.

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

	Canadian Adults	Recent Leisure Travellers in Canada	
	Total	Total	Heritage Enthusiasts
Adults 18+	*23.3 million*	*14.0 million*	*2.2 million*
Canadian Destinations	60%	100%	100%
Atlantic Canada	11%	18%	28%
Quebec	21%	36%	44%
Ontario	29%	48%	54%
Manitoba/Saskatchewan	9%	15%	17%
Alberta	14%	24%	30%
British Columbia	18%	30%	36%
Territories	1%	1%	2%
Other Destinations			
Any U.S.A. Destination	29%	36%	44%
Mexico/Caribbean	9%	9%	11%
U.K./Other Europe	8%	9%	17%
Other Countries	6%	6%	11%
Sun/Sea Destinations	20%	23%	26%
Any Locations Outside Canada (NET)	39%	45%	57%

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

Some regions can be said to have particularly high "attraction rates" compared to others because they lure high levels of Heritage Tourism Enthusiasts relative to their resident populations. . Those that are especially successful in attracting Heritage Tourism Enthusiasts over a two year period relative to their share of the Canadian adult population include Atlantic Canada (3.5), Alberta (3.3) and, to a lesser extent, British Columbia (2.8). About three times as many Heritage Tourism Enthusiasts claim to have visited these regions than their share of the total adult population would suggest (see summary table A-2, appended).

Ontario is the least successful in attracting domestic heritage tourists relative to its population – this province represents 38 per cent of the country's adults and 54 per cent of Heritage Tourism Enthusiasts, for an "attraction rate" of 1.4. Since it is a substantive tourism *market* for Ontario, the fact that Quebec generates comparatively few heritage tourists may explain why Ontario is not a more prominent heritage 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 44 per cent of Heritage Tourism Enthusiasts over a two year period, for a 1.8 "attraction rate".

The U.S.A. is a strong competitor for travel within the Heritage Tourism Enthusiast segment. Over 2-in-5 of these tourists say they have taken a leisure trips to the United States (44%) and 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 Heritage 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 almost twice this proportion of Heritage Tourism Enthusiasts make this claim (17%).

Retention of Heritage Tourism Enthusiasts for Canadian heritage attractions and events will likely be a challenge since close to 3-in-5 of them have taken holidays outside Canada – including the U.S.A., Europe and other countries – over the past two years (57%).

3.3 Demographic Characteristics of Heritage Tourism Enthusiasts

Heritage Tourism Enthusiasts are equally likely to be men and women and are concentrated at the older end of the adult age spectrum. Close to 3-in-10 of them are at least 55 years of age.

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

	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	HERITAGE ENTHUSIASTS
Adults 18+	*14.0 million*	*2.2 million*
Men	48%	50%
Women	52%	50%
18 - 34 years	33%	25%
35 - 44 years	24%	27%
45 - 54 years	19%	20%
55 - 64 years	12%	16%
65+ years	13%	12%
Average Age	43.4 years	45.1 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 Heritage Tourism Enthusiasts are substantively under-represented among younger Canadians, and especially among those between 18 and 34 years. This age group represents 1-in-3 domestic travellers as a whole (33%) but only 1-in-4 Heritage Tourism Enthusiasts (25%). Under-representation at the younger end of the age spectrum brings the average age of Heritage Tourism Enthusiasts to about 45 years – somewhat older than the 43 year average age for domestic leisure tourists in total.

Heritage Tourism Enthusiasts span the income and education spectrums, with about one-third falling into a relatively low income group (under $40,000), about one-quarter claiming to have household incomes in the $40,000 to $60,000 range (24%) and somewhat more between $60,000 to $100,000 (30%). Incomes in excess of $100,000 are characteristic of one-seventh of these heritage enthusiasts (14%).

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

	Recent Leisure Travellers in Canada	
	Total	Heritage Enthusiasts
Adults 18+	*14.0 million*	*2.2 million*
Household Income		
Under $40,000	39%	32%
$40,000 - $59,999	26%	24%
$60,000 - $99,999	25%	30%
$100,000 or more	11%	14%
Average	$54,900	$60,000
Education		
Some Secondary or Less	14%	7%
Completed Secondary	26%	22%
Some Post Secondary	39%	42%
Graduated University	21%	28%

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

This income pattern differs from that of all recent domestic leisure travellers: within the Heritage Tourism Enthusiast segment there are fewer *low* income Canadians and more high-middle and high income Canadians than there are among domestic travellers as a whole. The average household income for the typical domestic leisure visitor in Canada is $54,900 and the average for the sub-group with a particular interest in heritage is $60,000.

Higher household incomes are consistent with higher levels of formal education: close to 3-in-10 Heritage Tourism Enthusiasts have at least one university degree (28%) and a further 42 per cent have had some post-secondary education.

Most Heritage Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. About one-third are likely to be in the market for heritage tourism experiences that take into account the interests and needs of teenagers or children (34%). While adult-only households predominate among Heritage Tourism Enthusiasts (66%), one-quarter of these Canadians live in households with children under twelve years of age (25%). The household composition of this market segment is almost identical to that of the typical domestic leisure tourist.

Table 7: Demographics of Canadian Heritage Tourism Enthusiasts – Household Composition

	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	HERITAGE ENTHUSIASTS
Adults 18+	*14.0 million*	*2.2 million*
Adult Only	65%	66%
Any Teens/Children	35%	34%
Any Children under 12	26%	25%

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

Heritage Tourism Enthusiasts also resemble the general domestic travelling public in their place of birth: most are Canadian-born (83%), with about 1-in-6 having birth places outside of Canada. Compared to Canada's adult population as a whole in which 21 per cent are immigrants, *new Canadians* are somewhat under-represented among Heritage Tourism Enthusiasts (17%).

Table 8: Demographics of Canadian Heritage Tourism Enthusiasts – Place of Birth

	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	HERITAGE ENTHUSIASTS
Adults 18+	*14.0 million*	*2.2 million*
Born In Canada	85%	83%
Born Outside Canada	15%	17%

Source: Special TAMS Tabulations, pages 7; 32.

3.4 Travel Activities Among Heritage Tourism Enthusiasts

3.4.1 Heritage Activities

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

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

	HERITAGE ENTHUSIASTS
Adults 18+	*2.2 million*
General history museums	86%
Farmers' fairs or markets	67%
Local festivals or fairs	65%
Science & tech museums	58%
Historic sites	55%
Historical replicas of cities/towns	54%
Pick your own farms / harvesting	39%
French Canadian cultural experiences	31%
Children's museums	25%
Western theme events	19%
Aboriginal cultural experiences in remote or rural setting	18%
Aboriginal attractions	16%
Pow Wow/other Aboriginal celebrations	9%
Carnivals such as Caribana/ Mardi Gras or Rio's Carnival	8%

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

Other popular *defining* activities include farmers' fairs or markets, local festivals and fairs, science and technology museums and historic sites including replicas of cities or towns. These experiences are sought by at least one-half of Heritage Tourism Enthusiasts.

About one-third of the Canadians in this market segment seek harvesting or "pick-your-own" farm experiences and/or French Canadian cultural activities on their travels and about one-quarter say they go to children's museums. Western theme events such as the Calgary Stampede and Aboriginal cultural experiences in remote or rural settings capture the interest of approximately 1-in-5 Heritage Tourism Enthusiasts.

3.4.2 Performing & Visual Arts Activities

Heritage Tourism Enthusiasts are also apt to attend live theatre productions while on their trips (48%), but are less enthusiastic about music: music festivals (25%), classical music concerts (24%), jazz concerts (18%) and opera (13%). About one-fifth go to theatre festivals while on trips. These participation rates in travel activities that characterize domestic Performing Arts Enthusiasts suggest a substantive degree of overlap between the Heritage and Performing Arts segments.

Table 10: Canadian Heritage Tourism Enthusiasts – Performing & Visual Arts Activities

	HERITAGE ENTHUSIASTS
Adults 18+	*2.2 million*
Performing Arts	
Theatre	48%
Music festivals	25%
Classical music concerts	24%
Theatre festivals	19%
Jazz music concerts	18%
Ballet or other dance	16%
Opera	13%
Literary festivals	11%
Musical attractions such as Jazzland	7%
Visual Arts	
Local arts & crafts studios	72%
Art galleries	56%
International film festivals	6%

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

While they may seek out live theatre when they travel, Heritage Tourism Enthusiasts are appreciably more inclined to shop or browse in local arts and crafts studios (72%) and are somewhat more likely to go to art galleries while on their trips (56%). Again, these high levels of overlap with activities used to define the Visual Arts Enthusiast segment are suggestive of cross-marketing and packaging opportunities.

3.4.3 Other Attraction-Based Activities

Almost three-fifths of those who travelled in Canada in the past couple of years and are Heritage Tourism Enthusiasts claim to have gone to zoos while on trips in the recent past and close to one-half have gone to botanical gardens and/or aquariums on their travels. 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 heritage market to Canada's destinations.

Table 11: Canadian Heritage Tourism Enthusiasts – Other Activities

	HERITAGE ENTHUSIASTS
Adults 18+	*2.2 million*
Zoos	57%
Botanical gardens	46%
Aquariums	45%
Planetariums	32%
Casinos	28%
Horse races	12%
Auto races	9%

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 Heritage Tourism Enthusiasts (48%). About one-third of these heritage experience seekers also claim to go cycling and kayaking or canoeing and slightly fewer go motor boating while on trips. Alpine and cross-country skiing also have followings within the Heritage Tourism Enthusiast market, attracting about one-quarter of these Canadians.

Table 12: Canadian Heritage Tourism Enthusiasts – Outdoor Activities Used To Define Soft Outdoor Adventure Market Segment

	HERITAGE ENTHUSIASTS
Adults 18+	*2.2 million*
Hiking/backpacking in wilderness settings	48%
Cycling	34%
Kayaking or canoeing	30%
Motor boating	28%
Downhill skiing	23%
Cross-county skiing	23%
Horseback riding	17%
Sailing	14%
Snowmobiling	8%
Snowboarding	5%
Motorcycling	4%
Wind surfing	3%
Hot air ballooning	1%

Source: Special TAMS Tabulations, page 9.

Other outdoor activities have even greater appeal to Heritage 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 (61%) and wildflower viewing (50%).

Fishing, golfing, bird and/or whale watching attract about one-third of Heritage Tourism Enthusiasts and about half this proportion claim to have sought the northern lights or other arctic experiences while on trips in the past couple of years (14%).

Table 13: Canadian Heritage Tourism Enthusiasts – Other Outdoor Activities

	HERITAGE ENTHUSIASTS
Adults 18+	*2.2 million*
Wildlife viewing	61%
Wildflowers / flora viewing	50%
Fishing	35%
Golfing	33%
Bird watching	31%
Whale watching	30%
Seeing northern lights/other artic experiences	14%

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 14: Canadian Heritage Tourism Enthusiasts – Frequent/Occasional Activities At Home

	Recent Leisure Travellers in Canada	
	Total	Heritage Enthusiasts
Adults 18+	*14.0 million*	*2.2 million*
Museum	39%	67%
Live theatre	43%	62%
Music concerts	47%	62%
Art gallery/art show	32%	57%
Zoo/botanical garden	38%	56%
Ballet	9%	18%
Opera	9%	17%
Casino	15%	15%

Source: Special TAMS Tabulations, pages 20; 38.

Heritage Tourism Enthusiasts seek a variety of cultural activities *at home* at appreciably higher rates than does the "typical" Canadian traveller. For example, two-thirds of heritage tourists claim to go to museums frequently or occasionally when in their home communities (67%) compared to only about two-fifths of recent leisure travellers as a whole (39%). Participation rates for live theatre (62%), music concerts (62%) and art galleries (57%) are also considerably higher among Heritage Tourism Enthusiasts than among "typical" Canadian travellers. Although at more subdued levels, these heritage tourists are also about twice as likely to go to ballet (18%) and/or opera performances (17%) in their home communities on a regular basis as are Canadian travellers as a whole.

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 heritage tourists with messages about heritage travel opportunities in Canada.

3.5 Ratings of Canada

Heritage 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 Heritage Tourism Enthusiast segment who refrain from offering an opinion.

In this context, Canada is most highly rated by domestic Heritage Tourism Enthusiasts for attributes that support an *outdoors* image rather than ones that support a *heritage* 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 great place for fishing
- A place with lots of things for mature adults to see and do
- One of best summer destinations

Ratings for having many cultural attractions and events and seeing important historical sites and significant places in history, along with being a place to experience different cultures and ways of life, while relatively favourable, fall below the more outdoor-oriented characteristics highlighted above. These heritage and culture-oriented attributes achieve parity or, more commonly, lower levels of support from Heritage Tourism Enthusiasts than do experiencing adventure and excitement, being safe for visitors, being clean and well cared for, friendliness, and a destination with a lot for young people to see and do.

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

One might have expected the heritage-oriented characteristics to be more enthusiastically rated by those who seek heritage activities than by the “typical” domestic tourist and to a very limited extent, this expectation is fulfilled: Heritage Tourism Enthusiasts are directionally more favourably disposed to Canada for the following attributes than are all Canadians with recent travel experience in Canada:

- great place to see historic sites;
- great place for Aboriginal culture; and
- great place to experience different cultures.

These heritage travellers are also more positive than the "typical" Canadian traveller in their estimation of Canada as being *one of best destinations for outdoor activities* and as a *great place to experience adventure and excitement*. These findings may suggest that exposure to heritage activities while travelling improves perceptions of Canada's image – not only for heritage tourism experiences but for other attributes as well. Nonetheless, Canada's image among its high potential domestic heritage market remains one dominated by the country's fresh, clean, beautiful outdoors. Considerable effort will likely be required to elevate ratings of heritage-oriented dimensions, now in the low eights or high sevens on a ten point scale, to the low nines and high eights achieved by outdoor image characteristics.

Table 15: Canadian Heritage Tourism Enthusiasts – Attitudes Toward Canada

	Recent Leisure Travellers in Canada		
	Total	Heritage Enthusiasts	
Adults 18+	*14.0 million*	*2.2 million*	
	Average	Average	Can't Rate
	#	#	%
Beautiful scenery	9.1	9.2	*
One of best destinations for outdoor activities	8.7	9.0	3%
Great place to relax	8.6	8.7	2%
Lots for families	8.6	8.7	2%
Great place for fishing	8.5	8.6	18%
Lots for mature adults	8.5	8.6	6%
One of best summer destinations	8.4	8.6	1%
Great place to experience adventure & excitement	8.1	8.4	7%
Safe for visitors	8.3	8.3	1%
Great place for hunting	8.3	8.3	33%
Clean/well cared for	8.3	8.3	1%
Place with friendly people	8.2	8.3	1%
Lots for young adults	8.1	8.3	8%
Great place to see historic sites	8.0	8.3	2%
Many cultural events & attractions	8.0	8.2	4%
Place with interesting shops	7.8	8.0	5%
Great place to experience different cultures	7.7	8.0	5%
Great place to experience city life	7.7	7.9	5%
Great place for Aboriginal culture	7.5	7.8	11%
Respects natural environment	7.7	7.7	3%
One of best winter destinations	7.5	7.6	5%
Place for romance	7.4	7.5	13%
Great place to experience "good life"	7.4	7.5	8%
Offers excellent value for money	7.1	7.4	3%
Popular, trendy place	6.8	7.0	12%

*Source: Special TAMS Tabulations, page 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 Heritage Tourism Enthusiasts

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

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

Canadians in the Heritage Tourism Enthusiast segment are avid local newspaper readers (84%). Furthermore, half of them claim to read the travel section of weekday editions of daily newspapers on a regular basis and almost three-fifths claim to read or look through the travel section of the weekend editions of a local newspaper.

Table 16: Canadian Heritage Tourism Enthusiasts – Print Media Read Regularly

	HERITAGE ENTHUSIASTS
Adults 18+	*2.2 million*
Daily Newspaper (Any)	**84%**
Weekday edition	72%
Travel section of weekday edition	50%
Weekend edition	75%
Travel section of weekend edition	59%
Community newspapers	83%
Any Magazines	**91%**
Travel magazines	42%
Canadian or National Geographic	41%
Sports magazines	20%
Hobby magazines	45%
News magazines	49%
Fashion/homemaking magazines	39%
General interest/city life magazines	25%

Source: Special TAMS Tabulations, page 15.

They may be avid magazine readers (91%), but only about two-fifths read travel magazines on a regular basis. The same proportion claims to read Canadian or National Geographic regularly (41%).

Daily and weekend newspapers may have better reach among Heritage Tourism Enthusiasts than does any particular type of television programming. Three-quarters of these tourists say they watch televised movies on a regular basis and approximately two-thirds claim to watch nature shows regularly. The early evening news, evening dramas and sitcoms, followed by instructional or hobby shows, the late evening news and professional sports are viewed by at least half of domestic Heritage Tourism Enthusiasts on a regular basis.

Table 17: Canadian Heritage Tourism Enthusiasts – Television Programs Viewed Regularly

	Heritage Enthusiasts
Adults 18+	*2.2 million*
Movies	75%
Nature shows	67%
Early evening news	63%
Evening drama	61%
Evening sitcoms	60%
Late evening news	54%
Professional sports	52%
Instructional/hobby shows	50%
Morning news	32%
Daytime programs on weekdays	19%

Source: Special TAMS Tabulations, page 17.

Even though many Heritage 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. Almost 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 18: Canadian Heritage Tourism Enthusiasts – Club/Organization Memberships

	Heritage Enthusiasts
Adults 18+	*2.2 million*
Auto club	45%
Sports club	27%
Nature organization	14%
Art gallery/museum	9%
Zoo/botanical garden	4%
Gardening club	3%

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 Heritage 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 19: 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 heritage events and sites outside of cities, including Aboriginal heritage 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 heritage sites and 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 20: 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%).

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.

Table 21: 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.

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 19: 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, increases in the proportion of *new Canadians* over the next two decades will likely pose special challenges for the Heritage Tourism Enthusiast market because of new immigrants' reluctance to travel *within* Canada.

Table 23: 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 24: 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 Heritage Tourism Enthusiasts

As noted in the demographic profile section of this report, the Heritage Tourism Enthusiast market segment tends to attract older travellers. Younger Canadians, and particularly those between 18 and 34 years of age are substantively under-represented in this segment.

Because the Canadian population will shift over the next two decades to an older and childless one, the very characteristics that define Heritage Tourism Enthusiasts help explain why growth in this market is predicted to be 55 per cent **higher** than would have been expected given today's population structure. The total domestic Heritage Tourism Enthusiast market is predicted to grow from 2.6 million in 2000 to 3.7 million by 2026.

A similar pattern is evident for changes in the Heritage Tourism Enthusiast segment that takes leisure trips within Canada. This population is expected to increase from 2.2 million now to 3.0 million in 2026. At 37 per cent, this growth rate is about 36 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, the growth rate for heritage tourists who will likely travel within the country (37%) is lower than is predicted growth for the segment as a whole (42%).

For purposes of contrast, the table below also displays predicted growth rates for other key CTC activity-based market segments. Clearly, segments such as Performing Arts 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 25: Canadian Adult Population – High Intensity Activity Groups

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
Adults 18+ in millions	2000	2026		
Total Canadian Adult Population	23.3	29.6	27%	
Total Heritage Enthusiasts	2.6	3.7	42%	55%
Heritage Enthusiasts Who Take Leisure Trips in Canada	**2.2**	**3.0**	**37%**	**36%**
Other CTC Activity Groups - Leisure Trips in Canada				
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%
Performing Arts Enthusiasts	1.1	1.5	44%	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 Caribbana; 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 Heritage Enthusiasts Visiting . . . Region	Attraction Rate
Atlantic Canada	8%	28%	3.5
Quebec	25%	44%	1.8
Ontario	38%	54%	1.4
Manitoba/Saskatchewan	7%	17%	2.4
Alberta	9%	30%	3.3
British Columbia	13%	36%	2.8

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

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

Playing volleyball	Auto races (as a spectator)
Ice skating	Professional baseball games (as a spectator)
In-line / roller skating	Professional basketball games (as a spectator)
	Professional figure skating (as a spectator)
Professional football games (as a spectator)	Scenic day or evening tours by boat
Professional golf tournaments (as a spectator)	Scenic day tours by train
Professional ice hockey games (as a spectator)	Going to wineries for day visits and tastings
Horse races	BUSINESS ACTIVITIES
	(WHILE ON A TRIP OF ONE OR MORE NIGHTS)
National or international sporting events such as the Olympic Games (as a spectator)	Attend business meetings out of town
Amateur sports / arts / hobby tournaments and competitions (as a spectator or participant)	Attend trade shows out of town
Recreational dancing	Attend business conventions out of town
Casinos	Attend conferences or seminars out of town
Local outdoor cafes	Attend company paid training out of town
Movies	Take a vacation paid for by your company (Incentive Travel)
Restaurant dining – regional or local cooking	
Restaurant dining – internationally acclaimed restaurants	Q.3 Getaways/Q. 8 Vacations
Shop or browse – bookstores or music stores	Took at least 1 trip in the **winter**
Shop or browse – antiques	Took at least 1 trip in the **spring**
Shop or browse – gourmet foods in retail stores or farms	Took at least 1 trip in the **summer**
Shop or browse – local arts & crafts studios or exhibitions	Took at least 1 trip in the **fall**
Shop or browse – clothing, shoes and jewellery	
Pick-your-own farms or participating in harvesting	Q. 6 Getaways/Q.11 Vacations Use in Past 2 Years
Read for relaxation or personal interest (while on trip)	Homes of friends & relatives
Camping – in large public campgrounds in national, state or provincial parks	Hotels / Resorts / Country Inns
Camping – in campgrounds outside national, state or provincial parks	Motels
Camping – in wilderness settings	Bed & Breakfasts
Staying at a lakeside resort in summer	Cottage, rented
Staying at a lakeside resort in winter	Cottage, your own
Staying at a ski resort or mountain resort in summer	Fishing or Hunting Lodges
Staying at a ski resort or mountain resort in winter	Campgrounds / RV Parks – Fully serviced (water, sewer, electricity)
Staying at a seaside resort in summer	Campgrounds / RV Parks – Electricity only
Staying at a seaside resort in winter	Unserviced campgrounds or backcountry
Staying at a remote or fly-in lodge	Other
Staying at a remote or fly-in outpost	IF CAMPING:
	What type of camping equipment did you use *most often*?
Staying at a wilderness lodge you can drive to by car	Tent
Staying at a private cottage or condo you own	Tent Trailer
Staying at a private cottage or condo you rent	Truck camper or van
Staying at a cooking school with accommodation on the premises	Travel Trailer / Fifth wheel
Staying at a wine tasting school with accommodation on the premises	Motorhome
Staying at a gourmet restaurant with accommodation on the premises	Q. 15 – Package Used in past two years
Staying at a health spa	Motorcoach touring package
Staying at a working farm or guest ranch	A resort or cruise package
Staying at a bed & breakfast	A theatre package
TOURING AND CRUISING (OVERNIGHT)	An adventure package
Guided scenic tours in the countryside, like fall colour tours where you stay one or more nights	A ski package
Wandering around small towns and villages where you stay one or more nights	A city package
Touring a region's wineries where you stay one or more nights	An educational package
Great Lakes cruises where you stay on board one or more nights	Some other type of package
Submarine "cruises" where you stay on board one or more nights	Travel to Ontario
Ocean cruises where you stay on board one or more nights	Ever
DAY TOURING	Never

(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