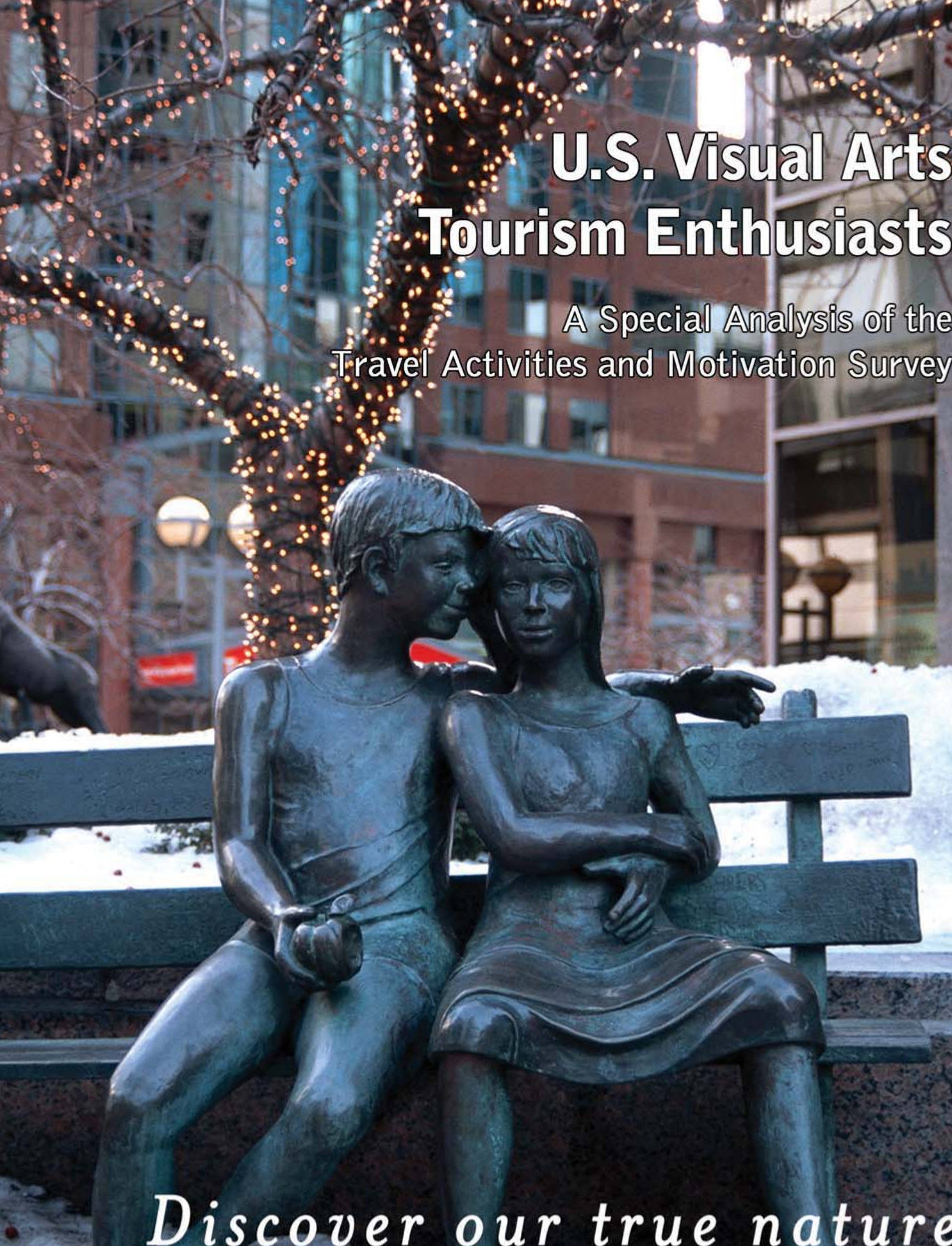

U.S. Visual Arts Tourism Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey

Discover our true nature

TAMS

Canadian Tourism Commission
Commission canadienne du tourisme

Canada

U.S. Visual Arts Tourism Enthusiasts

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

Prepared for:

The Canadian Tourism Commission (CTC)

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1. Introduction

Canada offers a wide range of tourism experiences to potential travellers from the United States. In order to obtain a better understanding of the potential size, characteristics and interests of American 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 **Visual Arts Tourism Enthusiasts --** Americans who have taken leisure trips to Canada and exhibit a particular interest in the visual arts when they travel. As such, they have taken at least one leisure trip to Canada and, in many cases, to other destinations in the past couple of years. At least one of their recent trips focussed on experiencing different cultures/ways of life or experiencing city life and they engaged in at least two of the following activities on their travels:

- art galleries;
- browsing in arts and crafts studios;
- international film festivals.

These tourists provide a rich source of information for tourism businesses and marketers who want to increase or retain the Visual Arts Tourism Enthusiast market from the U.S.A. in the future.

In addition to a *current* profile of Visual 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 the U.S.A. obtained from the U.S. Census Bureau, TAMS data were “aged” twenty-five years into the future. Comparisons of the market size, composition, and travel behaviour of Americans in 2000 with estimates of the market profile in 2025 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 foreign market. Chapter 4 of this report is devoted to the impacts of population changes on the U.S.A. Visual 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 Adventure Enthusiasts, Hard Outdoor Adventure Enthusiasts, Performing Arts Enthusiasts, Heritage Tourism Enthusiasts, Wine and Culinary Enthusiasts, Winter Outdoor Activity Participants and Alpine Ski Tourists.

2. Executive Summary

2.1 Visual Arts Tourism Enthusiasts: Market Size

Of the 200.4 million American adults in 2000, about 27.6 million are Visual Arts Tourism Enthusiasts (14%). Of these, one-quarter claim to have taken a leisure trip to Canada during the past two years or so. Thus, the U.S.A. market for Canada's visual arts tourism products is approximately 7.0 million adults.

Of activity-based market segments of special interest to the CTC, the 7.0 million Visual Arts Tourism Enthusiasts represent appreciably more Americans than does the Performing Arts market segment (3.8 million) but is not as large as is the Heritage Enthusiast segment (8.3 million). The U.S.A. Visual Arts Enthusiast market for Canada is about the same size as is the soft outdoor adventure segment (7.1 million).

Since Canada attracts the majority of its U.S.A. market from border states, it is not surprising that one-quarter of Visual Arts Tourism Enthusiasts, or 1.8 million of these Americans live in Tier I states – those immediately adjacent to the Canadian border. Less than one-fifth of *all* adult Americans live in these Tier I states (18%).

Visual Arts Tourism Enthusiasts who come to Canada are also much more likely to live in mid-tier states (34%) than is the American adult population as a whole (28%) and, to a lesser extent, than is evident within the entire flow of recent American tourists to Canada (32%). In contrast, visual arts travellers are *under*-represented in U.S.A. long haul states (Tier III). Over half of the U.S.A. adult population lives in Tier III states (54%), but only about two-fifths of Visual Arts Tourism Enthusiasts do so (41%).

Visual Arts Tourism Enthusiasts travel to Ontario and the three prairie provinces at much the same rate as do Americans with any recent Canadian experience, but exhibit a special interest in Atlantic Canada, Quebec, and British Columbia. Like the "typical" American visitor to Canada, these visual arts enthusiasts are most apt to have visited Ontario in the past couple of years (55%). About one-third claim to have been to British Columbia (36%) and/or Quebec (34%) over this time period. Smaller proportions have visited Atlantic Canada (16%) and the Prairie provinces – Alberta (10%) and Manitoba/Saskatchewan (7%).

There is a robust competitive environment for Canada within the Visual Arts Tourism Enthusiasts segment. These tourists display an almost universal tendency to take leisure trips *within* the United States and are also apt to travel to Mexico or the Caribbean. They have an especially strong interest in European destinations. In fact, Visual Arts tourists' interest in destinations outside North America is appreciably higher than the "typical" U.S.A. traveller to Canada, reinforced, no doubt, by their cultural interests.

2.2 Visual Arts Tourism Enthusiasts: Demographic Characteristics

Visual Arts Tourism Enthusiasts are somewhat more likely to be women (53%) than men (47%). They span the age spectrum and closely resemble the age profile of all recent American travellers to Canada. As such, approximately 1-in-4 visual arts enthusiasts are between the ages of 18 and 34 years, and about 1-in-5 fall into the 35 to 44 or 45 to 54 year age groups. Close to one-third are at least 55 years of age.

Most Visual Arts Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Only one-quarter of them are likely to be in the market for tourism experiences that take into account the interests and needs of teenagers or children.

Visual Arts Tourism Enthusiasts have income levels well above the "typical" U.S.A. traveller to Canada, with an average household income of $72,500 (US$) compared to $65,200 (US$) for the typical U.S.A. leisure visitor to Canada (1998 dollars). They are also much more likely than is the typical American traveller to Canada to have a university degree (41%) or other post-secondary education (46%).

2.3 Cultural Activities

By definition, Visual Arts Tourism Enthusiasts participate in multiple visual arts 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. Almost all of them have gone to an art gallery or art show, and shopped or browsed in local arts and crafts studios while on recent trips. Attendance at an international film festival emerges as a *niche* activity within this market segment – only 1-in-12 claim to have gone to this type of festival on a trip in the past couple of years (8%).

Other cultural activities used to define *performing arts* and *heritage* market segments are also popular travel activities for Visual Arts Tourism Enthusiasts. Three-quarters of these visual arts enthusiasts have gone to general history museums, two-thirds have gone to live theatre performances and about half have been to science and technology museums, historic sites, farmers' fairs or markets, and local festivals or fairs while on recent trips.

2.4 Overlap With Other Activity-Based Segments

U.S.A. Visual Arts Tourism Enthusiasts with recent leisure travel experiences in Canada have relatively wide-ranging tourism interests, with a particular emphasis on other *cultural* activities.

The 7.0 million Visual Arts Tourism Enthusiasts share the travel interests of Heritage Enthusiasts – three-fifths fall into this market segment (4.4 million). To a lesser extent, visual arts aficionados also fit the activity profile of Performing Arts Tourism Enthusiasts (41%, or 2.9 million) and Wine & Culinary Enthusiasts (38%, or 2.6 million). A sizeable minority of these visual arts seekers are found among outdoor adventure tourists (33%, or 2.3 million).

These overlaps suggest considerable opportunities for cross-market packaging and promotion of indoor and outdoor tourism products within the U.S.A. Visual Arts Tourism Enthusiast market.

2.5 Image Challenges & Media Sources

Canada is most highly rated by Visual Arts Tourism Enthusiasts from the U.S.A. for attributes that support an *outdoors* rather than a *cultural* or *urban* image:

- A place with beautiful scenery;
- Clean and well cared for;
- A place with lots of things for mature adults to see and do;
- 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 friendly people; and
- A place that is safe for visitors.

Americans in the visual arts-oriented market segment are generally positive in their impressions of Canada for respecting the natural environment, being one of the best destinations for outdoor activities, having ample activities for young people, and as a summer destination.

They have less favourable impressions of Canada for value for money, as a place to experience different cultures, for historic sites and important places in history, for Aboriginal culture and for romance. Americans in the Visual Arts Tourism Enthusiast segment are least positive about Canada as a destination with a popular or trendy image and as a winter destination.

Since visual arts-oriented tourism products are ideally suited to extending the shoulder and winter tourism markets for Canada because they are indoor activities, it is unfortunate that Americans in the visual arts segment do not have a more favourable impression of Canada as a place to travel in the winter. Considerable effort will likely be required to alter their impression of Canada as a winter tourism destination if these tourists are to be attracted to Canada during the winter.

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 American Automobile Association (AAA).

2.6 Impacts of Population Changes

Fundamental changes in the U.S.A.'s population structure might be taken into account in tourism planning and product development for Visual Arts Tourism Enthusiasts over the next two decades:

- As the primary market for inbound tourism from the United States, border and mid-tier state populations will grow at an appreciably *lower* rate than will the population of the U.S.A. as a whole, and particularly the southern tier of the U.S.A. At an estimated 18 per cent increase in the adult population of states that are on the Canada/ U.S.A. border by 2025 compared to a 27 per cent increase for the entire country, the pool of Americans from which Canada has to draw from for the all-important "border" market will increase at a lower rate than will more distant parts of the U.S.A. By 2025, the border state population is estimated to reach 42.3 million adults from its current level of 35.9 million.
- Older people – those who are at least 55 years of age – will represent an increasingly sizeable proportion of the American population. They currently account for over one-quarter of the adult population (27%) but will represent over one-third by 2025 (37%).
- As the population ages, the proportion of American adults living in households with children will decline. At this time, 1-in-3 adults live in households with teenagers or children (34%), but this proportion will diminish to less than 3-in-10 by 2025 (29%).

2.7 Implications for Visual Arts Tourism Enthusiasts

There will be an increase in the absolute number of Americans who will be in the market for visual arts-based activities between 2000 and 2025, from an estimated 27.6 million now to about 36.3 million in 2025.

Canada's likely share of this market – those who will seek visual arts experiences when they travel and will take leisure trips to Canada – is also expected to grow over the next two decades, from 7.0 million to 9.2 million.

2.8 Summary

The Visual Arts Tourism Enthusiast market for Canada from the U.S.A. is characterized by almost equal proportions of men and women, concentration at the older end of the age spectrum, high incomes and a high level of formal education.

Almost all of these tourists have gone to an art gallery and browsed in local arts and crafts studios when on at least one leisure trip over the past couple of years. They also are very likely to have attended live theatre performances and classical music concerts, and to have gone to general history museums, historic sites and local festivals or fairs on recent trips.

Of the market segments of special interest to the CTC, Visual Arts Tourism Enthusiasts currently represent 27.6 million adult Americans. Of these, one-quarter have taken recent leisure trips to Canada (7.0 million), leaving considerable opportunity for growth now.

The potential Visual Arts market also has considerable growth potential over the next two decades. The Canada-bound portion of visual arts-oriented tourists is expected to increase to 9.2 million between now and 2025.

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

Image building for Canada’s visual arts products over the next two decades will likely be required to increase the enthusiasm of Visual Arts Tourism Enthusiasts for destinations in Canada vis à vis the U.S.A. and Europe. If there is interest in encouraging this segment to travel to Canada in *off-peak* seasons, efforts will be required to overcome resistance to Canada as *one of the best destinations to visit in the winter*.

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

Of the 200.4 million American adults in 2000, about 27.6 million are Visual Arts Tourism Enthusiasts (14%). Of these, one-quarter claim to have taken a leisure trip to Canada during the past two years or so. Thus, the U.S.A. market for Canada's visual arts tourism products is approximately seven million adults.

Table 1: U.S.A. Visual Arts Tourism Enthusiasts – Market Size & Comparisons With Other Segments

	USA Adults	Recent Leisure Travellers in Canada	
	Total	Total	Visual Arts Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*7.0 million*
Visual Arts	**27.6**	**7.0**	**7.0**
Performing Arts	15.6	3.8	2.9
Heritage	34.5	8.3	4.4
Wine/Culinary	21.6	5.5	2.6
Soft Outdoor Adventure	35.5	7.1	2.3
Hard Outdoor Adventure	15.7	3.2	1.4
Winter Outdoors (excluding alpine skiing)	15.0	3.7	1.3
Alpine Skiing	21.4	4.6	1.7

Source: Special TAMS Tabulations, page 7-1. See Appendix for unweighted base sizes.

At 7.0 million, these Visual Arts Tourism Enthusiasts represent appreciably more Americans than does the Performing Arts market segment but is not as large as is the Heritage Enthusiast segment of special interest to the CTC. The U.S.A. Visual Arts Enthusiast market for Canada is about the same size as is the soft outdoor adventure segment.

Visual Arts Tourism Enthusiasts with recent Canadian leisure travel experiences share the tourism activity interests of Heritage and Performing Arts Enthusiasts and of wine/culinary tourists. Two-thirds of Visual Arts Tourism Enthusiasts are also in the Heritage market segment (63%, or 4.4 million); two-fifths have a tourism activity profile that is consistent with Performing Arts Enthusiasts (41%, or 2.9 million) and, to a lesser extent, with Wine and Culinary Enthusiasts (38%, or 2.6 million). A sizeable portion of American visual arts-oriented tourists are also likely to seek outdoor adventure tourism activities on their travels (33%, or 2.3 million). These overlaps suggest considerable opportunities for cross-market packaging and promotion *within* cultural and wine/culinary tourism product areas for U.S.A. Visual Arts Tourism Enthusiasts.

Within the subset of all American adults who take leisure trips in Canada and participate in at least one cultural activity – estimated to be approximately 23.5 million – the Visual Arts Tourism Enthusiast segment represents close to one-third. This proportion is considerably larger than that evident for performing arts tourists (16%) and close to parity with the heritage tourist group.

Table 2: Market Share of Key Segments

	USA Adults	Recent Leisure Travellers to Canada	
Millions of Adults 18+	Total	Total	Any Cultural Activities
Visual Arts	**14%**	**27%**	**30%**
Performing Arts	8%	14%	16%
Heritage	17%	32%	35%
Wine/Culinary	11%	21%	23%
Soft Outdoor Adventure	18%	27%	28%
Hard Outdoor Adventure	8%	12%	13%
Winter Outdoors (excluding alpine skiing)	8%	14%	15%
Alpine Skiing	11%	18%	18%

Source: Special TAMS Tabulations, Table 7-1. See Appendix for unweighted base sizes.

3.2 Where They Live and Where They Travel

Since Canada attracts the majority of its U.S.A. market from border states, it is not too surprising that one-quarter of Visual Arts Tourism Enthusiasts, or 1.8 million of these Americans live in Tier I states – those immediately adjacent to the Canadian border. Less than one-fifth of all adult Americans live in these Tier I states (18%). Thus, Americans who come to Canada and are Visual Arts Tourism Enthusiasts are over-represented in the *near* markets but not to the extent that is evident for the "typical" recent American visitor to Canada (33%).

Visual Arts Tourism Enthusiasts who come to Canada are also much more likely to live in mid-tier states (34%) than is the American adult population as a whole (28%). In contrast, visual arts travellers are *under*-represented in U.S.A. long haul states (Tier III). Over half of the U.S.A. adult population lives in Tier III states (54%), but only about two-fifths of Visual Arts Tourism Enthusiasts do so (41%).

Table 3: Geographic Distribution of U.S.A. Visual Arts Tourism Enthusiasts

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Visual Arts Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*7.0 million*
Tier I (Border States)	18%	33%	25%
Tier II	28%	32%	34%
Tier III	54%	35%	41%

Source: Special TAMS Tabulations, pages 1-5; 23-5. Percentages may not add to 100% due to rounding.

South Atlantic is the only U.S. Census region to produce a noticeably higher proportion of Visual Arts Tourism Enthusiasts with Canadian experience than would be expected in light of the country's population distribution as a whole or the "typical" American traveller to Canada. This region, including the Washington D.C. area, provides about 1-in-8 adult tourists to Canada over a two year period but supports 1-in-5 Visual Arts Tourism Enthusiasts with recent Canadian travel experience.

In contrast, these visual arts tourism aficionados are under-represented in the Mid-Atlantic region (15%) relative to the typical pattern of U.S. travel to Canada over the past two years (19%). The Mid-Atlantic region includes key border markets such as New York and Pennsylvania. For more regional information, please refer to Summary Table A-2, appended.

Visual Arts Tourism Enthusiasts travel to Ontario and the three prairie provinces at much the same rate as do Americans with any recent Canadian experience, but exhibit a special interest in Atlantic Canada, Quebec, and British Columbia. Like the "typical" American visitor to Canada, these visual arts enthusiasts are most apt to have visited Ontario in the past couple of years (55%). About one-third claim to have been to British Columbia (36%) and/or Quebec (34%) over this time period. Smaller proportions have visited Atlantic Canada (16%) and the Prairie provinces – Alberta (10%) and Manitoba/Saskatchewan (7%).

There is a robust competitive environment for Canada within the Visual Arts Tourism Enthusiasts segment. These tourists display an almost universal tendency to take leisure trips *within* the United States (95%) and are also apt to travel to Mexico or the Caribbean (26%). They have an especially strong interest in European destinations (34%) and those in other countries (25%). In fact, Visual Arts tourists' interest in destinations outside North America is appreciably higher than the "typical" U.S.A. traveller to Canada, reinforced, no doubt, by their cultural interests.

Table 4: U.S.A. Visual Arts Tourism Enthusiasts – Destinations Visited in Past 2 Years

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Visual Arts Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*7.0 million*
Canadian Destinations	13%	100%	100%
Atlantic Canada	2%	12%	16%
Quebec	3%	25%	34%
Ontario	7%	55%	55%
Manitoba/Saskatchewan	1%	7%	7%
Alberta	1%	10%	10%
British Columbia	4%	30%	36%
Territories	1%	4%	3%
Other Destinations			
Any U.S.A. Destination	69%	93%	95%
Mexico/Caribbean	15%	25%	26%
U.K./Other Europe	8%	18%	34%
Other Countries	7%	15%	25%
Any Non- U.S.A. (NET)	31%	100%	100%

Source: Special TAMS Tabulations, pages 2; 24. Percentages do not add to 100% because of multiple destinations.

3.3 Demographic Characteristics of Visual Arts Tourism Enthusiasts

Visual Arts Tourism Enthusiasts are somewhat more likely to be women (53%) than men (47%). They span the age spectrum and closely resemble the age profile of all recent American travellers to Canada. As such, approximately 1-in-4 visual arts enthusiasts are between the ages of 18 and 34 years, and about 1-in-5 fall into the 35 to 44 or 45 to 54 year age groups. Close to one-third are at least 55 years of age. The close resemblance between the visual arts market segment and U.S. travellers to Canada as a whole explains why the average ages of these tourists are the same – about 47 years.

Table 5: Demographics of U.S.A. Visual Arts Tourism Enthusiasts – Gender & Age

	RECENT LEISURE TRAVELLERS TO CANADA	
	TOTAL	VISUAL ARTS ENTHUSIASTS
Adults 18+	*26.3 million*	*7.0 million*
Men	51%	47%
Women	49%	53%
18 - 34 years	24%	23%
35 - 44 years	20%	20%
45 - 54 years	20%	19%
55 - 64 years	14%	16%
65+ years	17%	15%
Average Age	47.3 years	47.4 years

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

Visual Arts Tourism Enthusiasts span the income spectrum, with about two-fifths falling into a relatively low income group (under $40,000 US) and the same proportion claiming to have a household income in the $40,000 to $60,000 US range (22%). One-third have incomes that fall between $60,000 to $100,000 US (33%). Incomes in excess of $100,000 are characteristic of one-quarter of these visual arts enthusiasts (25%).

Table 6: Demographics of U.S.A. Visual Arts Tourism Enthusiasts – Income & Education

	Recent Leisure Travellers to Canada	
	Total	Visual Arts Enthusiasts
Adults 18+	*26.3 million*	*7.0 million*
Household Income (US$)		
Under $40,000	26%	21%
$40,000 - $59,999	24%	22%
$60,000 - $99,999	31%	33%
$100,000 or more	19%	25%
Average	$65,200 US	$72,500 US
Education		
Some Secondary or Less	6%	2%
Completed Secondary	19%	11%
Some Post Secondary	45%	46%
Graduated University	30%	41%

Source: Special TAMS Tabulations, pages 4, 5-2; 29,30-1/2. Income is percentaged among those stating and shown in 1998 U.S. dollars.

More visual arts tourists have incomes in the $60,000+ bracket (58%) than is the case for American travellers to Canada as a whole (50%), likely explaining why the average household income for Visual Arts Tourism Enthusiasts – $72,500 (US$) – is higher than all U.S. travellers to Canada ($65,200 US$).

Although higher household incomes are consistent with higher levels of formal education, an even greater proportion of Visual Arts Tourism Enthusiasts have at least one university degree (41%) than might be expected in light of their income levels. This level of university graduates is much higher than is found among American leisure travellers to Canada as a whole (30%). In addition to the many university graduates, almost half of the members of the visual arts tourism segment have had some other post-secondary education (46%).

Most Visual Arts Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Only one-quarter might be in the market for art gallery exhibitions or craft displays that take into account the interests and needs of teenagers or children (25%) and even fewer might seek content appropriate for children twelve years of age or under (17%).

Table 7: Demographics of U.S.A. Visual Arts Tourism Enthusiasts – Household Composition

	Recent Leisure Travellers to Canada	
	Total	Visual Arts Enthusiasts
Adults 18+	*26.3 million*	*7.0 million*
Adult Only	71%	75%
Any Teens/Children	29%	25%
Any Children under 12	22%	17%

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

3.4 Travel Activities Among Visual Arts Tourism Enthusiasts

3.4.1 Visual Arts Activities

Of the three activities used to define Visual Arts Tourism Enthusiasts, art galleries and local arts and crafts studios are almost universally popular within the market segment. Almost all of these enthusiasts claim to have engaged in these activities on a leisure trip in the past couple of years. Considerably fewer have been to an international film festival on a recent trip (8%). It is important to note that even though these Visual Arts Tourism Enthusiasts travelled to Canada during the past several years, the survey findings do not provide an indication of whether their art gallery or craft studio experiences or any other activities discussed in this report took place on a *Canadian* trip.

Table 8: U.S.A. Visual Arts Tourism Enthusiasts – Activities Used To Define Market Segment

	Visual Arts Enthusiasts
Adults 18+	*7.0 million*
Visual Arts	
Local arts & crafts studios	99%
Art galleries	99%
International film festivals	8%

Source: Special TAMS Tabulations, pages 9-1/5.

3.4.2 Heritage and Performing Arts Activities

Visual Arts tourists are also likely to engage in many of the activities used to define the *heritage* tourism market segment. In fact, 3-in-4 Visual Arts Tourism Enthusiasts also go to general history museums when travelling. Other popular *heritage* activities include science and technology museums, historic sites, farmers' fairs or markets, and local festivals or fairs. These experiences are sought by at least half of Visual Arts Tourism Enthusiasts. Somewhat fewer of the Americans in this market segment seek replicas of cities or towns while on their travels.

Table 9: U.S.A. Visual Arts Tourism Enthusiasts – Heritage Activities

	VISUAL ARTS ENTHUSIASTS
Adults 18+	*7.0 million*
General history museums	74%
Science & tech museums	58%
Historic sites	56%
Farmers' fairs or markets	55%
Local festivals or fairs	50%
Historical replicas of cities/towns	41%
French Canadian cultural experiences	24%
Children's museums	24%
Aboriginal attractions	21%
Pick your own farms / harvesting	19%
Aboriginal cultural experiences in remote or rural setting	19%
Western theme events	15%
Carnivals such as Caribana/ Mardi Gras or Rio's Carnival	12%
Pow Wow/other Aboriginal celebrations	11%

Source: Special TAMS Tabulations, page s 9-1/4

French Canadian cultural activities, children's museums, Aboriginal attractions or cultural experiences and harvesting or "pick-your-own" farms are included on trip itineraries by one-quarter to one-fifth of these American tourists.

Going to live theatre performances – an activity used to define Performing Arts Tourism Enthusiasts – is also quite popular among members of the Visual Arts Tourism Enthusiast segment (64%). Between one-quarter and one-third of the visual art segment also go to classical music concerts, dance performances and/or jazz concerts while on trips.

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

Table 10: U.S.A. Visual Arts Tourism Enthusiasts – Performing Arts Activities

	VISUAL ARTS ENTHUSIASTS
Adults 18+	*7.0 million*
Theatre	64%
Classical music concerts	34%
Ballet or other dance	28%
Jazz music concerts	24%
Opera	22%
Music festivals	19%
Theatre festivals	19%
Musical attractions such as Jazzland	14%
Literary festivals	9%

Source: Special TAMS Tabulations, pages 9-1/2

3.4.3 Other Attraction-Based Activities

Approximately three-fifths of the Americans who travelled to Canada in the past couple of years and are Visual Arts Tourism Enthusiasts claim to have gone to zoos, botanical gardens and/or aquariums while on trips in the recent past. Casinos (40%), followed by planetariums (30%) 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 U.S. visual arts market to Canada's destinations.

Table 11: U.S.A. Visual Arts Tourism Enthusiasts – Other Activities

	VISUAL ARTS ENTHUSIASTS
Adults 18+	*7.0 million*
Zoos	59%
Aquariums	56%
Botanical gardens	56%
Casinos	40%
Planetariums	30%
Horse races	16%
Auto races	11%

Source: Special TAMS Tabulations, pages 9-3/5.

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 Visual Arts Tourism Enthusiasts (37%). About one-third of these visual arts-oriented tourists also claim to have gone cycling and approximately one-quarter went kayaking or canoeing and/or alpine skiing on recent leisure trips.

Table 12: U.S.A. Visual Arts Tourism Enthusiasts – Outdoor Activities Used To Define Soft Outdoor Adventure Market Segment

	VISUAL ARTS ENTHUSIASTS
Adults 18+	*7.0 million*
Hiking/backpacking in wilderness settings	37%
Cycling	30%
Kayaking or canoeing	25%
Downhill skiing	23%
Horseback riding	21%
Motor boating	19%
Sailing	17%
Cross-county skiing	13%
Snowmobiling	6%
Hot air ballooning	4%
Snowboarding	4%
Motorcycling	4%
Wind surfing	2%

Source: Special TAMS Tabulations, Table 8.

Other outdoor activities have even greater appeal to Visual 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 (55%) and wildflower viewing (51%).

Whale watching, fishing, bird watching, and golfing attracted approximately one-quarter of these Americans while on their travels over the past couple of years.

Table 13: U.S.A. Visual Arts Tourism Enthusiasts – Other Outdoor Activities

	VISUAL ARTS ENTHUSIASTS
Adults 18+	*7.0 million*
Wildlife viewing	55%
Wildflowers / flora viewing	51%
Whale watching	28%
Fishing	26%
Bird watching	25%
Golfing	24%
Seeing northern lights/other artic experiences	9%

Source: Special TAMS Tabulations, Table 8.

3.5 Ratings of Canada

Visual 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 Americans in the Visual Arts Tourism Enthusiast segment who refrain from offering an opinion.

In this context, Canada is most highly rated by Visual Arts Tourism Enthusiasts from the U.S.A. for attributes that support an *outdoors* rather than a *cultural* or *urban* image:

- A place with beautiful scenery;
- Clean and well cared for;
- A place with lots of things for mature adults to see and do;
- 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 friendly people; and
- A place that is safe for visitors.

Visual art enthusiasts who provide a rating of Canada's *fishing* and/or *hunting* have very favourable opinions of Canada for these activities, but sizeable proportions of Americans refrain from rating the country on these dimensions.

Americans in the visual arts-oriented market segment are generally positive in their impressions of Canada for *respecting the natural environment*, being one of the *best destinations for outdoor activities*, having ample *activities for young people*, and as a *summer destination.*

They have less favourable impressions of Canada for *value for money*, as a place *to experience different cultures*, for *historic sites and important places in history*, for *Aboriginal culture* and for *romance*. Americans in the Visual Arts Tourism Enthusiast segment are least positive about Canada as a destination with *a popular or trendy* image and as a *winter destination.*

Since visual arts-oriented tourism products are ideally suited to extending the shoulder and winter tourism markets for Canada because they are *indoor* activities, it is unfortunate that Americans in the visual arts segment do not have a more positive impression of Canada as a place to travel in the winter. Considerable effort will likely be required to alter this impression of Canada as a *winter tourism destination* if these tourists are to be attracted to Canadian destinations in the winter.

Table 14: U.S.A. Visual Arts Tourism Enthusiasts – Attitudes Toward Canada

	Recent Leisure Travellers to Canada		
	Total	Visual Arts Enthusiasts	
Adults 18+	*26.3 million*	*7.0 million*	
	Average #	Average #	Can't Rate %
Beautiful scenery	9.2	9.2	3%
Clean/well cared for	8.7	8.8	4%
Great place for fishing	8.7	8.8	37%
Lots for mature adults	8.6	8.6	8%
Great place to relax	8.6	8.6	6%
Great place for hunting	8.4	8.6	55%
Lots for families	8.5	8.5	13%
Place with friendly people	8.4	8.5	5%
Safe for visitors	8.3	8.5	9%
Respects natural environment	8.5	8.4	10%
One of best destinations for outdoor activities	8.2	8.3	18%
Lots for young adults	8.1	8.2	26%
One of best summer destinations	8.1	8.2	11%
Great place to experience adventure & excitement	8.0	8.1	16%
Place with interesting shops	8.0	8.1	8%
Many cultural events & attractions	7.8	8.0	10%
Great place to experience city life	7.7	8.0	7%
Offers excellent value for money	7.9	8.0	7%
Great place to experience different cultures	7.6	7.6	10%
Great place to see historic sites	7.5	7.5	7%
Great place for Aboriginal culture	7.4	7.5	33%
Great place to experience "good life"	7.1	7.3	19%
Place for romance	7.2	7.3	26%
Popular, trendy place	6.6	6.6	21%
One of best winter destinations	6.3	6.0	19%

*Source: Special TAMS Tabulations, Table 13. 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 Visual Arts Tourism Enthusiasts

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

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

Americans in the Visual Arts Tourism Enthusiast segment are avid local newspaper readers (90%). Furthermore, almost two-thirds of them claim to read the travel section of weekday editions of daily newspapers on a regular basis and three-quarters claim to read or look through the travel section of the weekend editions of a local newspaper.

Table 15: U.S.A. Visual Arts Tourism Enthusiasts – Print Media Read Regularly

	VISUAL ARTS ENTHUSIASTS
Adults 18+	*7.0 million*
Daily Newspaper (Any)	**90%**
Weekday edition	79%
Travel section of weekday edition	62%
Weekend edition	85%
Travel section of weekend edition	75%
Community newspapers	77%
Any Magazines	**96%**
News magazines	57%
Travel magazines	53%
National Geographic	46%
Hobby magazines	43%
Fashion/homemaking magazines	35%
General interest/city life magazines	28%
Sports magazines	25%

Source: Special TAMS Tabulations, page 14.

Visual arts-oriented tourists are also avid magazine readers (96%). The most widespread regular readership is captured by *news* and *travel* magazines, followed by National Geographic and hobby magazines. The National Geographic readership level is appreciably higher than that evident for American adults as a whole (30%), but on par with members of other cultural enthusiast segments such as Heritage and Performing Arts tourists.

Daily and weekend newspapers may have better reach among Visual Arts Tourism Enthusiasts than does any particular type of television programming. Almost two-thirds of these tourists say they watch televised movies on a regular basis and over half claim to watch the early evening news, nature shows, professional sports broadcasts, evening dramas and sitcoms.

Table 16: U.S.A. Visual Arts Tourism Enthusiasts – Television Programs Viewed Regularly

	VISUAL ARTS ENTHUSIASTS
Adults 18+	*7.0 million*
Movies	65%
Early evening news	59%
Nature shows	57%
Professional sports	53%
Evening drama	53%
Evening sitcoms	51%
Late evening news	46%
Morning news	41%
Instructional/hobby shows	34%
Daytime programs on weekdays	15%

Source: Special TAMS Tabulations, page 16.

Visual Arts Tourism Enthusiasts belong to art galleries or museums (30%) and zoos or botanical gardens (18%) at appreciably higher rates than do Americans at large (9%, each). Nature organizations also have appreciably higher rates of membership among visual arts-oriented tourists in the U.S.A. (15%) than is evident among the American population as a whole (7%). These findings suggest that mailing lists of these types of organizations might prove useful as communication tools to reach these art gallery tourists from the U.S.A.

Over half of Visual Arts Tourism Enthusiasts are also members of an auto club (e.g., AAA). Since most Americans drive to their destinations in Canada, this type of organization may also offer marketers a viable communications conduit to this market.

Table 17: U.S.A. Visual Arts Tourism Enthusiasts – Club/Organization Memberships

	VISUAL ARTS ENTHUSIASTS
Adults 18+	*7.0 million*
Auto club	61%
Sports club	33%
Art gallery/museum	30%
Nature organization	15%
Zoo/botanical garden	18%
Gardening club	4%

Source: Special TAMS Tabulations, page 17.

4. Projections to 2025

4.1 Introduction

In 2000, there were approximately 200.4 million Americans 18 years of age or older. The U.S. Census Bureau projects that this number will increase to 254.3 million by the year 2025, for an increase of 27 per cent. When this population increase is applied to the TAMS data, estimates of market size and characteristics in 2025 can be estimated, assuming that people in various age, gender and regional groups behave in 2025 as they did in 2000.

Because the population will not grow at the same rate among all age groups or in all regions of the United States, tourism businesses and marketers should anticipate and prepare for changes in travel activities and interests in the U.S.A. market over the next two decades. In this chapter, some important structural shifts are described for the United States as a whole. Subsequently, expected change in the in-bound Visual 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

U.S.A. Adult Population – Gender & Age

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
	2000	2025		
Adults 18+	*200.4 million*	*254.3 million*		
Men	48%	48%	27%	2%
Women	52%	52%	26%	-2%
18 - 34 years	30%	27%	14%	-50%
35 - 44 years	21%	17%	-1%	-103%
45 - 54 years	17%	16%	17%	-35%
55 - 64 years	11%	13%	47%	76%
65+ years	16%	24%	84%	211%

Source: Special TAMS U.S.A. Tabulations, Table 1.

Percentage of Adult Population In . . . 2000 Proportion of American 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 30 per cent of all adults living in the U.S.A., or 60.7 million of the 200.4 million American adults (2000).

Percentage of Adult Population In . . . 2025 Proportion of American adults in 2025 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 27 per cent of all adults living in the U.S.A., or 68.9 million of the 254.3 million American adults (2025).

Growth Rate from 2000 to 2025 Anticipated rate of change in the number of American adults who will fit the demographic or behavioural characteristic by 2025. **Example:** the 68.9 million 18 – 34 year olds in 2025 is 14 per cent higher than the 60.7 million 18 – 34 year olds in 2000.

Impact of 2025 Population Structure on Growth Rate How much the structure of the population projected for 2025 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 (14%) will be 50 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 2025, there would have been 77.0 million young adults in the U.S.A., or 27 per cent more than there were in 2000 but changes in the population structure bring this number down to 68.9 million or 14 per cent more than there were in 2000, for a difference in the growth rate [14%/27%] of –50 per cent.

4.3 Regional Changes in the USA Market

The adult population in different parts of the country will change at different rates, with those that border Canada experiencing the *lowest* growth rate (18%) and those furthest from the border experiencing the highest growth rate (37%).

While states that are immediately adjacent to Canada's border will increase in population over the next two decades, they will do so at a rate of growth that is one-third lower than would have occurred if the population structure of 2000 were to remain intact through 2025. The middle tier states, including some of Canada's major markets such as Pennsylvania, Illinois, Ohio, Massachusetts and the Washington D.C. area will also represent a smaller share of the total USA market than they do now, with a decline in the anticipated growth rate of more than half. In contrast, southern states – those that are more challenging markets for Canada – will increase as a proportion of the total USA adult population, and will grow at a 38 per cent higher rate than would have been anticipated given the current population structure (see Appendix for the states included in each of the three tiers).

Table 18: Shifts in USA Adult Population

	U.S.A. Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Adults 18+ in millions	2000	2025		
Total USA	**200.4**	**254.3**	**27%**	
Tier I (Canada's Border)	35.9	42.3	18%	-34%
Tier II	56.6	64.0	13%	-51%
Tier III	108.0	148.0	37%	38%

Source: Special TAMS U.S.A. Tabulations, Table 5. See Appendix for definition of Tiers.

Mountain and Pacific region states will experience the most dramatic growth over the next two decades. The Mountain region will grow from about 12.1 million adults to 17.4 million by 2025 while the three Pacific states – California, Oregon and Washington – will increase from about 30 million now to over 44 million in two decades. Almost 35 million of these American adults will live in California (see summary table A-3, appended for population estimates for each U.S. Census region).

4.4 Demographic Changes in the USA Market

Changes to the demographic profile of Americans over time are apt to have an especially dramatic impact on Canada's tourism volume and value, and the types of activities our American neighbours will seek on their 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 slightly to just over 1-in-4 adult Americans by 2025;
- Americans in their "family" years (35 – 44) will fall from just over 1-in-5 members of the adult population to about 1-in-6;
- Middle-aged Americans (45 – 54) will hold steady as a proportion of the total population, from 17 per cent to 16 per cent in 2025;
- Starting at about age 55, the pattern shifts with older people representing *higher* proportions of the adult population in the U.S.A. in 2025 than they do now. The increase is most prominent among Americans 65 years of age or older. This cohort currently represents about one-sixth of the adult population but by 2025 it is expected to represent one-quarter.

In absolute numbers, the young adult population (18 – 34 years) will shift from about 60.7 million to 68.9 million between 2000 and 2025. This young cohort is growing at a rate that is 50 per cent lower than would have been expected if the structure of the population had remained constant between 2000 and 2025. Thus, the impact of changes in the population mix in the U.S.A. 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 marginal decrease in the absolute numbers of Americans in the 35 to 44 year age bracket – from 42.4 million in 2000 to 42.0 million in 2025.

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 Americans by 2025 as they do now, or 59.8 million instead of the current 32.5 million.

Table 19: U.S.A. Adult Population – Gender & Age

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
	2000	2025		
Adults 18+	*200.4 million*	*254.3 million*		
Men	48%	48%	27%	2%
Women	52%	52%	26%	-2%
18 - 34 years	30%	27%	14%	-50%
35 - 44 years	21%	17%	-1%	-103%
45 - 54 years	17%	16%	17%	-35%
55 - 64 years	11%	13%	47%	76%
65+ years	16%	24%	84%	211%

Source: Special TAMS U.S.A. Tabulations, Table 1.

4.4.2 Household Income & Education

The proportion of American adults with household incomes in various groups from *low* to *high income* are not expected to change substantively between now and 2025. A modest increase in the proportion of Americans who have at least some post-secondary education is anticipated over the next two decades. This change in the educational composition of the U.S.A. market may have an impact on tourism choices in the future.

Table 20: U.S.A. Adult Population – Household Income & Education

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
	2000	2025		
Adults 18+	*200.4 million*	*254.3 million*		
Household Income (US$)				
Low Income	45%	45%	26%	-4%
Low - Middle	23%	23%	26%	-2%
Middle – High	21%	21%	24%	-9%
High Income	11%	11%	25%	-7%
Education				
Some Secondary or Less	13%	11%	9%	-65%
Completed Secondary	26%	26%	24%	-10%
Some Post Secondary	40%	41%	29%	10%
Graduated University	20%	22%	36%	35%

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

4.4.3 Household Composition

The 2025 age mix of Americans 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 over 1-in-4 (27%) to less than 1-in-4 (23%). Conversely, those who live in adult-only households (no children or teenagers) will increase from 59 per cent to 64 per cent.

Table 21: U.S.A. Adult Population – Household Composition

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
	2000	2025		
Adults 18+	*200.4 million*	*254.3 million*		
Adult Only	59%	64%	37%	40%
Any Teens/Children	34%	29%	9%	-68%
Any Children under 12	27%	23%	8%	-70%

Source: Special TAMS U.S.A. Tabulations, Table 4.

4.5 Destination Choices

With the exception of a slight increase in the proportion of Americans who will likely travel abroad, outbound destination choices in 2025 are likely to look much as they do now, with about 1-in-7 taking leisure trips over a two year period to a Canadian destination and about the same proportion travelling to Mexico or the Caribbean. Travel by Americans to Europe will remain at just under ten percent, but the growth rate for Europe-bound travel (39%) is noticeably higher than would have been expected based on the current population structure.

Table 22: U.S.A. Adult Population – Destinations Visited on Leisure Trips in Past Couple of Years

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
	2000	2025		
Adults 18+	*200.4 million*	*254.3 million*		
Canada	13%	14%	31%	14%
Mexico/Caribbean	15%	15%	28%	5%
U.K./Europe	8%	9%	39%	46%

Source: Special TAMS U.S.A. Tabulations, Tables 24 - 31.

It is important to note that this predicted growth rate for Americans travelling to Europe (39%) is higher than the expected rate of increase in Americans travelling to Canada (31%), suggesting greater competition for Canada within the outbound U.S.A. market in the years to come.

4.6 Visual Arts Tourism Enthusiasts

The total Visual Arts Tourism Enthusiast market in the U.S.A. is predicted to grow from 27.6 million in 2000 to 36.3 million by 2025.

An even more dramatic increase is evident in the subset of this segment that takes leisure trips to Canada. This population is expected to increase from 7.0 million now to 9.2 million in 2025, for a growth rate of 31 per cent.

For purposes of contrast, the table also displays predicted growth rates for other key CTC activity-based market segments. Clearly, segments that appeal to more youthful tourists such as Soft Outdoor Adventure Enthusiasts and winter sports participants will experience lower growth rates than those such as Heritage Tourism Enthusiasts who tend to be older.

Table 23: U.S.A. Adult Population – High Intensity Activity Groups

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Adults 18+ in millions	**2000**	**2025**		
Total U.S.A. Adult Population	200.4	254.3	27%	
Total Visual Arts Enthusiasts	27.6	36.3	32%	17%
Visual Arts Enthusiasts Who Take Leisure Trips to Canada	**7.0**	**9.2**	**31%**	**16%**
Other CTC Activity Groups - Leisure Trips in Canada				
Soft Outdoor Adventure Enthusiasts	7.1	8.8	25%	-7%
Alpine Skiing	4.6	5.7	25%	-8%
Heritage Enthusiasts	8.3	12.3	47%	76%
Performing Arts Enthusiasts	3.8	5.1	35%	30%
Other Winter Outdoors	3.7	4.7	26%	-2%
Wine/Culinary Enthusiasts	5.5	7.5	35%	31%

Source: Special TAMS U.S.A. 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 U.S. TAMS Mailback Questionnaire

	UNWEIGHTED RECORDS – MAILBACK
Adult Leisure Travellers to Canada in the Past 2 Years	1,509
Soft Outdoor Adventure Enthusiasts	419
Hard Outdoor Adventure Enthusiasts	177
Wine/Culinary Enthusiasts	341
Heritage Enthusiasts	498
Performing Arts Enthusiasts	244
Visual Arts Enthusiasts	**429**
Winter Outdoors (excluding alpine skiing)	227
Alpine Skiing	254

Source: Special TAMS U.S.A. 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 Additional Summary Tables

Table A-2: U.S.A. Visual Arts Tourism Enthusiasts – Census Regions

	USA Adults	Recent Travellers to Canada	
	Total 200.4 million	Total 26.3 million	Visual Arts Enthusiasts 7.0 million
New England	5%	8%	5%
Mid Atlantic	14%	19%	15%
South Atlantic	18%	12%	20%
East North Central	16%	23%	21%
West North Central	7%	5%	4%
East South Central	6%	3%	3%
West South Central	11%	5%	7%
Mountain	6%	6%	8%
Pacific	15%	18%	18%

Source: Special TAMS Tabulations, pages 1; 23. Percentages may not add to 100% due to rounding.

Table A-3: Shifts in USA Adult Population – U.S. Census Regions

	U.S.A. Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Numbers in millions	2000	2025		
Total USA	**200.4**	**254.3**	**27%**	
New England	10.2	11.9	16%	-39%
Mid Atlantic	28.9	32.2	11%	-59%
South Atlantic	36.9	49.4	34%	26%
East North Central	32.9	36.4	10%	-61%
West North Central	13.9	16.5	19%	-30%
East South Central	12.1	15.2	25%	-5%
West South Central	21.6	29.2	35%	31%
Mountain	12.1	17.4	43%	60%
Pacific	30.4	44.3	46%	69%

Source: Special TAMS U.S.A. Tabulations, Table 5.

5.4 Definition of USA Tiers

In TAMS analysis, the following states were assigned to three tiers, based on their distance from the USA/Canada border.

Tier I (Canada's Border States): Washington, Montana, North Dakota, Minnesota, Wisconsin, Michigan, New York, Vermont, New Hampshire, Maine, Alaska.

Tier II: Oregon, Idaho, Wyoming, South Dakota, Nebraska, Iowa, Illinois, Indiana, Ohio, Pennsylvania, Massachusetts, Connecticut, Washington D.C., Virginia, Maryland.

Tier III: Nevada, Utah, Colorado, Kansas, Missouri, Kentucky, Tennessee, West Virginia, Delaware, New Jersey, Rhode Island, California, Arizona, New Mexico, Texas, Oklahoma, Arkansas, Louisiana, Mississippi, Alabama, Georgia, North Carolina, South Carolina, Florida, Hawaii.

5.5 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