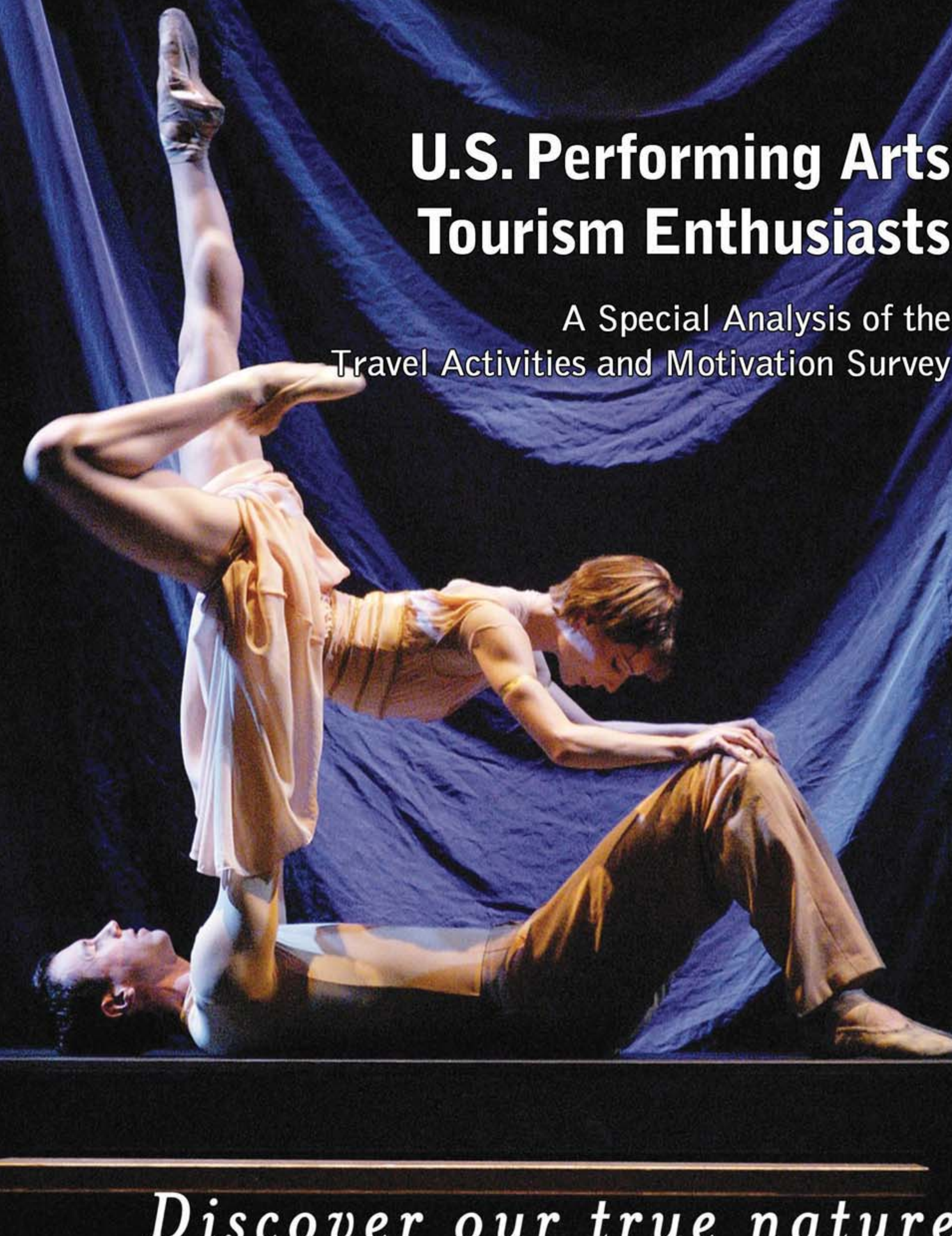

U.S. Performing Arts Tourism Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey

TAMS

Discover our true nature

CANADIAN TOURISM COMMISSION
COMMISSION CANADIENNE DU TOURISME

Canada

U.S. Performing Arts Tourism Enthusiasts

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

Prepared for:

The Canadian Tourism Commission (CTC)

Prepared by:

Research Resolutions
& Consulting Ltd.

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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 **Performing Arts Tourism Enthusiasts** – Americans who have taken leisure trips to Canada and exhibit a particular interest in cultural performances when they travel. As such, they have taken leisure trips to Canada and, in many cases, to other destinations in the past couple of years. They have taken at least one trip that focussed on experiencing different cultures/ways of life or experiencing city life and have included at least three of the following activities on their travels:

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

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

In addition to a *current* profile of Performing Arts Tourism Enthusiasts, the TAMS survey has been modified to permit an assessment of the impacts of an aging population on market potential for this group. Using population projections for 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. Performing Arts Tourism Enthusiast market.

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

2. Executive Summary

2.1 Performing Arts Tourism Enthusiasts: Market Size

Of the 200.4 million American adults in 2000, about 15.6 million are Performing Arts Tourism Enthusiasts (8%). 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 performing arts attractions and events is approximately 3.8 million adults.

At 3.8 million, these Performing Arts Tourism Enthusiasts represent appreciably fewer Americans than do other culture-based market segments of special interest to the CTC, e.g., Heritage and Visual Arts Enthusiasts and than the outdoor-oriented market segments.

Since Canada attracts the majority of its U.S.A. market from border states, it is not surprising that more than one-quarter of Performing Arts Tourism Enthusiasts, or one 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%).

Performing Arts Tourism Enthusiasts who come to Canada are also much more likely to live in mid-tier states (36%) 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, performing 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 one-third of Performing Arts Tourism Enthusiasts do so (37%).

With the notable exception of Quebec's especially strong attraction for them, Performing Arts Tourism Enthusiasts travel to Canada's regions in much the same way as do Americans with any recent Canadian experience. As such, they are most apt to have visited Ontario in the past couple of years (58%), Quebec (41%), followed by British Columbia (30%). Smaller proportions visited Atlantic Canada (16%) and the Prairie provinces – Alberta (8%) and Manitoba/Saskatchewan (6%).

There is a robust competitive environment for Canada within the Performing 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, Performing 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 Performing Arts Tourism Enthusiasts: Demographic Characteristics

Performing Arts Tourism Enthusiasts are almost equally likely to be men and women. They span the age spectrum but are somewhat more concentrated in the 55 years or older age group than is the U.S. travelling population as a whole.

Most Performing Arts Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Fewer than one-quarter of them are likely to be in the market for performance-based tourism experiences that take into account the interests and needs of teenagers or children (22%).

Performing Arts Tourism Enthusiasts have income levels well above the "typical" U.S.A. traveller to Canada, with an average household income of $71,900 (US$) 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 (47%).

2.3 Performance-based Activities

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

Activities Engaged in by more than 50 per cent of Performing Arts Tourism Enthusiasts

- Theatre (92%)
- Classical music concerts (66%)
- Jazz music concerts (52%)
- Ballet/other dance performances (50%)

Other performances that attract between 20 per cent and 30 per cent of these tourists include opera (44%), music festivals (42%), theatre festivals (40%), and, less commonly literary festivals (20%) and musical attractions such as Jazzland (20%).

2.4 Overlap With Other Activity-Based Segments

U.S.A. Performing 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 3.8 million Performing Arts Tourism Enthusiasts share the travel interests of Visual Arts Enthusiasts – three-quarters fall into this market segment (2.9 million) and, to a lesser extent, with Heritage Tourism Enthusiasts (69%, or 2.6 million) and Wine and Culinary Enthusiasts (46%, or 1.7 million). A sizeable minority of these performance seekers are also found among outdoor adventure tourists (35%, or 1.3 million).

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

2.5 Image Challenges & Media Sources

Canada is most highly rated by Performing Arts Tourism Enthusiasts 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.

American performance-goers are generally positive in their impressions of Canada for having lots of things for families to do, for its friendly people, for being safe, 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 Performing Arts Tourism Enthusiast segment are least positive about Canada as a destination with a popular or trendy image and as a winter destination.

Since many performance-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 comparatively few Americans in the performing arts segment have a 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.

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 Performing 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 Performing Arts Tourism Enthusiasts

There will be an increase in the absolute number of Americans who will be in the market for performance-based activities between 2000 and 2025, from an estimated 15.6 million now to about 19.6 million in 2025. Canada's likely share of this market – those who will seek cultural performances when they travel and will take leisure trips to Canada – is also expected to grow over the next two decades, from 3.8 million to 5.1 million.

At 35 per cent, this growth rate is 30 per cent **higher** than would have been expected given today's population structure.

2.8 Summary

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

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

Of the market segments of special interest to the CTC, Performing Arts Tourism Enthusiasts currently represent 15.6 million adult Americans. Of these, one-quarter have taken recent leisure trips to Canada (3.8 million), leaving considerable opportunity for growth.

The potential Performing Arts market also has growth potential over the next two decades, in large part because it appeals to older Americans. The Canada-bound portion of performance-oriented tourists is expected to increase to 5.1 million between now and 2025.

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

Image building for Canada's performing arts products over the next two decades will likely be required to increase the enthusiasm of Performing Arts Tourism Enthusiasts for destinations in Canada vis à vis the U.S.A. and Europe. 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. Performing Arts Tourism Enthusiasts – 2000

3.1 Market Size & Overlap With Other Activity Groups

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

Of the 200.4 million American adults in 2000, about 15.6 million are Performing Arts Tourism Enthusiasts (8%). 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 performing arts tourism products is approximately 3.8 million adults.

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

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Performance Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*3.8 million*
Performing Arts	**15.6**	**3.8**	**3.8**
Heritage	34.5	8.3	2.6
Wine/Culinary	21.6	5.5	1.7
Visual Arts	27.6	7.0	2.9
Soft Outdoor Adventure	35.5	7.1	1.3
Hard Outdoor Adventure	15.7	3.2	0.9
Winter Outdoors (excluding alpine skiing)	15.0	3.7	1.0
Alpine Skiing	21.4	4.6	1.0

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

At 3.8 million, these Performing Arts Tourism Enthusiasts represent appreciably fewer Americans than do other culture-based market segments of special interest to the CTC, e.g., Heritage and Visual Arts Enthusiasts and than the outdoor-oriented market segments.

Performing Arts Tourism Enthusiasts with recent Canadian leisure travel experiences share interests of Visual Arts Enthusiasts – three-quarters are also in this market segment (2.9 million). They also have a tourism activity profile that is consistent with Heritage Enthusiasts (69%, or 2.6 million) and, to a lesser extent, with Wine and Culinary Enthusiasts (46%, or 1.7 million). American performance-oriented tourists are, however, not especially likely to seek outdoor adventure tourism activities on their travels (35%, or 1.3 million). These overlaps suggest considerable opportunities for cross-market packaging and promotion *within* cultural and wine/culinary tourism product areas for U.S.A. Performing 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 Performing Arts Tourism Enthusiast segment represents about one-sixth. This proportion is considerably lower than that evident for heritage or visual arts tourist groups, those with a keen interest in soft outdoor adventure and those who seek wine and culinary experiences when on trips.

Table 2: Market Share of Key Segments

	USA Adults	Recent Leisure Travellers in Canada	
Millions of Adults 18+	Total	Total	Any Cultural Activities
Performing Arts	**8%**	**14%**	**16%**
Heritage	17%	32%	35%
Wine/Culinary	11%	21%	23%
Visual Arts	14%	27%	30%
Soft Outdoor Adventure	18%	27%	28%
Hard Outdoor Adventure	8%	12%	19%
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 more than one-quarter of Performing Arts Tourism Enthusiasts, or one 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 Performing Arts Tourism Enthusiasts are over-represented in the *near* markets.

Performing Arts Tourism Enthusiasts who come to Canada are also much more likely to live in mid-tier states (36%) 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, performing 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 one-third of Performing Arts Tourism Enthusiasts do so (37%).

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

	USA ADULTS	RECENT LEISURE TRAVELLERS TO CANADA	
	TOTAL	TOTAL	PERFORMANCE ENTHUSIASTS
Adults 18+	*200.4 million*	*26.3 million*	*3.8 million*
Tier I (Border States)	18%	33%	27%
Tier II	28%	32%	36%
Tier III	54%	35%	37%

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

U.S. Census regions that have somewhat higher proportions of Performing Arts Tourism Enthusiasts with Canadian experience than would be expected in light of the country's population distribution as a whole include East North Central, Mid-Atlantic and South Atlantic. East North Central includes major population centres such as Illinois, Michigan and Ohio. This region represents 16 per cent of the total U.S. population but 22 per cent of Performing Arts Tourism Enthusiasts. Mid-Atlantic, including New York, Pennsylvania and New Jersey, constitutes 14 per cent of the U.S. adult population but 18 per cent of performance enthusiasts who travel to Canada. Similarly, South Atlantic represents 18 per cent of the population and 21 per cent of performance-oriented tourists.

Conversely, West South Central, including Texas is the only region in which Performing Arts Tourism Enthusiasts seem to be significantly under-represented (11% of total population; 4% of Performing Arts Tourism Enthusiasts). For more regional information, please refer to Summary Table A-2, appended.

With the notable exception of Quebec, Performing Arts Tourism Enthusiasts travel to Canada's regions in much the same way as do Americans with any recent Canadian experience. As such, they are most apt to have visited Ontario in the past couple of years (58%), Quebec (41%), followed by British Columbia (30%). Smaller proportions visit Atlantic Canada (16%) and the Prairie provinces – Alberta (8%) and Manitoba/Saskatchewan (6%).

As noted above, the single exception to the "typical" destination pattern for Americans who come to Canada on leisure trips is Quebec. Possibly because of the availability of many cultural performance venues in Montréal, two-fifths of Performing Arts Tourism Enthusiasts from the U.S.A. are drawn to Quebec but only one-quarter of the general American travelling public that comes to Canada includes Quebec on its itineraries.

There is a robust competitive environment for Canada within the Performing Arts Tourism Enthusiasts segment. These tourists display an almost universal tendency to take leisure trips *within* the United States (96%) and are also apt to travel to Mexico or the Caribbean (34%). They have an especially strong interest in European destinations (37%) and those in other countries (21%). In fact, Performing 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. Performing Arts Tourism Enthusiasts – Destinations Visited in Past 2 Years

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Performance Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*3.8 million*
Canadian Destinations	13%	100%	100%
Atlantic Canada	2%	12%	16%
Quebec	3%	25%	41%
Ontario	7%	55%	58%
Manitoba/Saskatchewan	1%	7%	6%
Alberta	1%	10%	8%
British Columbia	4%	30%	30%
Territories	1%	4%	3%
Other Destinations			
Any U.S.A. Destination	69%	93%	96%
Mexico/Caribbean	15%	25%	34%
U.K./Other Europe	8%	18%	37%
Other Countries	7%	15%	21%
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 Performing Arts Tourism Enthusiasts

Performing Arts Tourism Enthusiasts are equally likely to be men and women. They span the age spectrum with concentration in the 55 years or older age group.

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

	Recent Leisure Travellers to Canada	
	Total	Performance Enthusiasts
Adults 18+	*26.3 million*	*3.8 million*
Men	51%	49%
Women	49%	51%
18 - 34 years	24%	22%
35 - 44 years	20%	18%
45 - 54 years	20%	18%
55 - 64 years	14%	19%
65+ years	17%	18%
Average Age	47.3 years	49.2 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, performance-goers are somewhat over-represented among Americans between 55 and 64 years. This age group represents 1-in-7 U.S. travellers to Canada as a whole (14%) but close to one-fifth of Performing Arts Tourism Enthusiasts (19%). The over-representation at the older end of the age spectrum likely explains why – at 49 years – the average age of Performing Arts Tourism Enthusiasts is somewhat higher than is the average for “typical” American visitors to Canada (47 years).

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

	Recent Leisure Travellers to Canada	
	Total	Performance Enthusiasts
Adults 18+	*26.3 million*	*3.8 million*
Household Income (US$)		
Under $40,000	26%	21%
$40,000 - $59,999	24%	21%
$60,000 - $99,999	31%	36%
$100,000 or more	19%	22%
Average	$65,200 US	$71,900 US
Education		
Some Secondary or Less	6%	1%
Completed Secondary	19%	9%
Some Post Secondary	45%	47%
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.

Performing Arts Tourism Enthusiasts span the income spectrum, with close to 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 (21%). One-third have incomes that fall between $60,000 to $100,000 US$ (36%). Incomes in excess of $100,000 are characteristic of more than one-fifth of these performance enthusiasts (22%).

More performance tourists have incomes in the $60,000 plus bracket (58%) than is the case for American travellers to Canada as a whole (50%), likely explaining why the average household income for Performing Arts Tourism Enthusiasts – $71,900 (US$) – 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 Performing 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 performance tourism segment have had some other form of post-secondary education (47%).

Most Performing Arts Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Fewer than one-quarter might be in the market for performances on their trips that take into account the interests and needs of teenagers or children (22%) and even fewer might seek performances for children twelve years of age or under (17%).

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

	Recent Leisure Travellers to Canada	
	Total	Performance Enthusiasts
Adults 18+	*26.3 million*	*3.8 million*
Adult Only	71%	78%
Any Teens/Children	29%	22%
Any Children under 12	22%	17%

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

3.4 Travel Activities Among Performing Arts Tourism Enthusiasts

3.4.1 Performing Arts Activities

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

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

	Performance Enthusiasts
Adults 18+	*3.8 million*
Theatre	92%
Classical music concerts	66%
Jazz music concerts	52%
Ballet or other dance	50%
Opera	44%
Music festivals	42%
Theatre festivals	40%
Literary festivals	20%
Musical attractions such as Jazzland	20%

Source: Special TAMS Tabulations, page s 9-1/2

Other popular *defining* activities include classical music concerts (66%) as well as jazz concerts, and ballet. These experiences are sought by at least one-half of Performing Arts Tourism Enthusiasts while on recent trips.

Approximately two-fifths of the Americans in this market segment seek out opera, music and/or theatre festivals and one-fifth go to literary festivals or musical attractions such as Jazzland as part of their itineraries.

3.4.2 Heritage and Visual Arts Activities

Performing Arts tourists are also likely to engage in many of the activities used to define the *heritage* tourism market segment. In fact, 3-in-4 Performing Arts Tourist Enthusiasts also go to general history museums and close to 2-in-3 go to science and technology museums when travelling. Other popular *heritage* activities include historic sites, local festivals and fairs, and farmers' fairs or markets. These experiences are sought by at least one-half of Performing Arts Tourism Enthusiasts.

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

	PERFORMANCE ENTHUSIASTS
Adults 18+	*3.8 million*
General history museums	78%
Science & tech museums	63%
Historic sites	60%
Local festivals or fairs	59%
Farmers' fairs or markets	57%
Historical replicas of cities/towns	42%
French Canadian cultural experiences	29%
Children's museums	26%
Aboriginal attractions	25%
Pick your own farms / harvesting	24%
Aboriginal cultural experiences in remote or rural setting	22%
Carnivals such as Caribana/ Mardi Gras or Rio's Carnival	18%
Western theme events	15%
Pow Wow/other Aboriginal celebrations	13%

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

Two-fifths of the Americans in this market segment go to historic replicas of cities or towns on their travels. Likely as a function of their predisposition to go to Quebec on their Canadian trips, 3-in-10 Performing Arts Tourism Enthusiasts claim to explore French Canadian cultural activities on their travels.

Not surprisingly in light of the adult-only composition of their households, these performance-goers do not express particular interest in children's museums. They are also comparatively uninterested in harvesting or "pick-your-own" farm experiences, Aboriginal cultural events and attractions or in western theme events.

Performing Arts Tourism Enthusiasts are also apt to shop or browse in local arts and crafts studios (84%) and go to art galleries (82%) while on their trips.

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

	PERFORMANCE ENTHUSIASTS
Adults 18+	*3.8 million*
Visual Arts	
Local arts & crafts studios	84%
Art galleries	82%
International film festivals	11%

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

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

3.4.3 Other Attraction-Based Activities

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

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

	PERFORMANCE ENTHUSIASTS
Adults 18+	*3.8 million*
Zoos	67%
Aquariums	62%
Botanical gardens	60%
Casinos	41%
Planetariums	36%
Horse races	23%
Auto races	13%

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 Performing Arts Tourism Enthusiasts (36%). About one-third of these performance seekers also claim to have gone cycling and approximately one-quarter went motor boating, kayaking or canoeing and/or alpine skiing on recent leisure trips.

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

	PERFORMANCE ENTHUSIASTS
Adults 18+	*3.8 million*
Hiking/backpacking in wilderness settings	36%
Cycling	33%
Kayaking or canoeing	28%
Horseback riding	27%
Motor boating	24%
Downhill skiing	23%
Sailing	19%
Cross-county skiing	17%
Snowmobiling	9%
Hot air ballooning	7%
Snowboarding	3%
Motorcycling	3%
Wind surfing	2%

Source: Special TAMS Tabulations, Table 8.

Other outdoor activities have even greater appeal to Performing Arts Tourism Enthusiasts. They tend to be encounters with the outdoors that are less strenuous than those used to define Soft Outdoor Adventure Enthusiasts – activities such as wildlife (54%) and wildflower viewing (50%).

Fishing, whale watching, golfing and bird watching attract between one-quarter and one-third of these performance-goers while on their travels over the past couple of years.

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

	PERFORMANCE ENTHUSIASTS
Adults 18+	*3.8 million*
Wildlife viewing	54%
Wildflowers / flora viewing	50%
Fishing	30%
Whale watching	29%
Golfing	28%
Bird watching	26%
Seeing northern lights/other artic experiences	9%

Source: Special TAMS Tabulations, Table 8.

3.5 Ratings of Canada

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

In this context, Canada is most highly rated by Performing 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.

Performance-goers 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.

American performance-goers 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 Performing Arts Tourism Enthusiast segment are least positive about Canada as a destination with *a popular or trendy* image and as a *winter destination.*

Since many performance-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 performing 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 this impression of Canada as a *winter tourism destination.*

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

	Recent Leisure Travellers to Canada		
	Total	Performance Enthusiasts	
Adults 18+	*26.3 million*	*3.8 million*	
	Average #	Average #	Can't Rate %
Beautiful scenery	9.2	9.2	3%
Clean/well cared for	8.7	8.9	3%
Great place for fishing	8.7	8.9	40%
Lots for mature adults	8.6	8.8	9%
Great place to relax	8.6	8.7	5%
Lots for families	8.5	8.6	15%
Place with friendly people	8.4	8.6	4%
Great place for hunting	8.4	8.6	50%
Safe for visitors	8.3	8.6	10%
Respects natural environment	8.5	8.4	10%
One of best destinations for outdoor activities	8.2	8.4	14%
Lots for young adults	8.1	8.3	22%
One of best summer destinations	8.1	8.3	10%
Great place to experience adventure & excitement	8.0	8.2	13%
Place with interesting shops	8.0	8.2	7%
Many cultural events & attractions	7.8	8.2	9%
Great place to experience city life	7.7	8.2	7%
Offers excellent value for money	7.9	8.1	10%
Great place to experience different cultures	7.6	7.9	9%
Great place to see historic sites	7.5	7.7	9%
Great place for Aboriginal culture	7.4	7.5	32%
Great place to experience "good life"	7.1	7.5	14%
Place for romance	7.2	7.3	22%
Popular, trendy place	6.6	6.8	21%
One of best winter destinations	6.3	6.2	17%

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".

3.6 Ways to Reach Performing Arts Tourism Enthusiasts

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

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

Americans in the Performing 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. Performing Arts Tourism Enthusiasts – Print Media Read Regularly

	PERFORMANCE ENTHUSIASTS
Adults 18+	*3.8 million*
Daily Newspaper (Any)	90%
Weekday edition	81%
Travel section of weekday edition	64%
Weekend edition	87%
Travel section of weekend edition	77%
Community newspapers	83%
Any Magazines	97%
Travel magazines	59%
News magazines	54%
National Geographic	51%
Hobby magazines	41%
Fashion/homemaking magazines	39%
General interest/city life magazines	35%
Sports magazines	30%

Source: Special TAMS Tabulations, page 14.

Performance-goers are also avid magazine readers (97%). The most widespread regular readership is captured by *travel* magazines, followed by those that focus on *news*. National Geographic has regular readership among half of these performance-oriented tourists. 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 Visual Arts tourists.

Daily and weekend newspapers may have better reach among Performing 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 close to this proportion claim to watch the early evening news and nature shows. Professional sports broadcasts, evening dramas and sitcoms and the late evening news are viewed regularly by about one-half of these Americans.

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

	PERFORMANCE ENTHUSIASTS
Adults 18+	*3.8 million*
Movies	65%
Early evening news	60%
Nature shows	58%
Professional sports	52%
Evening drama	49%
Late evening news	48%
Evening sitcoms	47%
Morning news	44%
Instructional/hobby shows	31%
Daytime programs on weekdays	14%

Source: Special TAMS Tabulations, page 16.

Performing Arts Tourism Enthusiasts belong to art galleries or museums (33%) and zoos or botanical gardens (20%) at appreciably higher rates than do Americans at large (9%, each). Nature organizations also have appreciably higher rates of membership among performance-oriented tourists in the U.S.A. (16%) 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 performance-oriented tourists from the U.S.A.

Over three-fifths of Performing 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. Performing Arts Tourism Enthusiasts – Club/Organization Memberships

	PERFORMANCE ENTHUSIASTS
Adults 18+	*3.8 million*
Auto club	62%
Sports club	36%
Art gallery/museum	33%
Zoo/botanical garden	20%
Nature organization	16%
Gardening club	5%

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 Performing Arts Tourism Enthusiast market is discussed.

4.2 An Aid to the Reader

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

Sample Table

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.

% 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).

% 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 Performing Arts Tourism Enthusiasts

The total Performing Arts Tourism Enthusiast market in the U.S.A. is predicted to grow from 15.6 million in 2000 to 19.6 million by 2025.

An even more dramatic increase is evident for changes in the subset of this segment that takes leisure trips to Canada. This population is expected to increase from 3.8 million now to 5.1 million in 2025. At 35 per cent, this growth rate is about 30 per cent **higher** than would have been expected given today's population structure.

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 Performing Arts and 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 Performing Arts Enthusiasts	15.6	19.6	26%	-4%
Performing Arts Enthusiasts Who Take Leisure Trips to Canada	**3.8**	**5.1**	**35%**	**30%**
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%
Other Winter Outdoors	3.7	4.7	26%	-2%
Heritage Enthusiasts	8.3	12.3	47%	76%
Visual Arts Enthusiasts	7.0	9.2	31%	16%
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. The activity list for each segment is provided in the footnotes to this report.

5.3 Additional Summary Tables

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

	USA ADULTS	RECENT TRAVELLERS TO CANADA	
	TOTAL 200.4 MILLION	TOTAL 26.3 MILLION	PERFORMANCE ENTHUSIASTS 3.8 MILLION
New England	5%	8%	6%
Mid Atlantic	14%	19%	18%
South Atlantic	18%	12%	21%
East North Central	16%	23%	22%
West North Central	7%	5%	3%
East South Central	6%	3%	3%
West South Central	11%	5%	4%
Mountain	6%	6%	8%
Pacific	15%	18%	15%

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