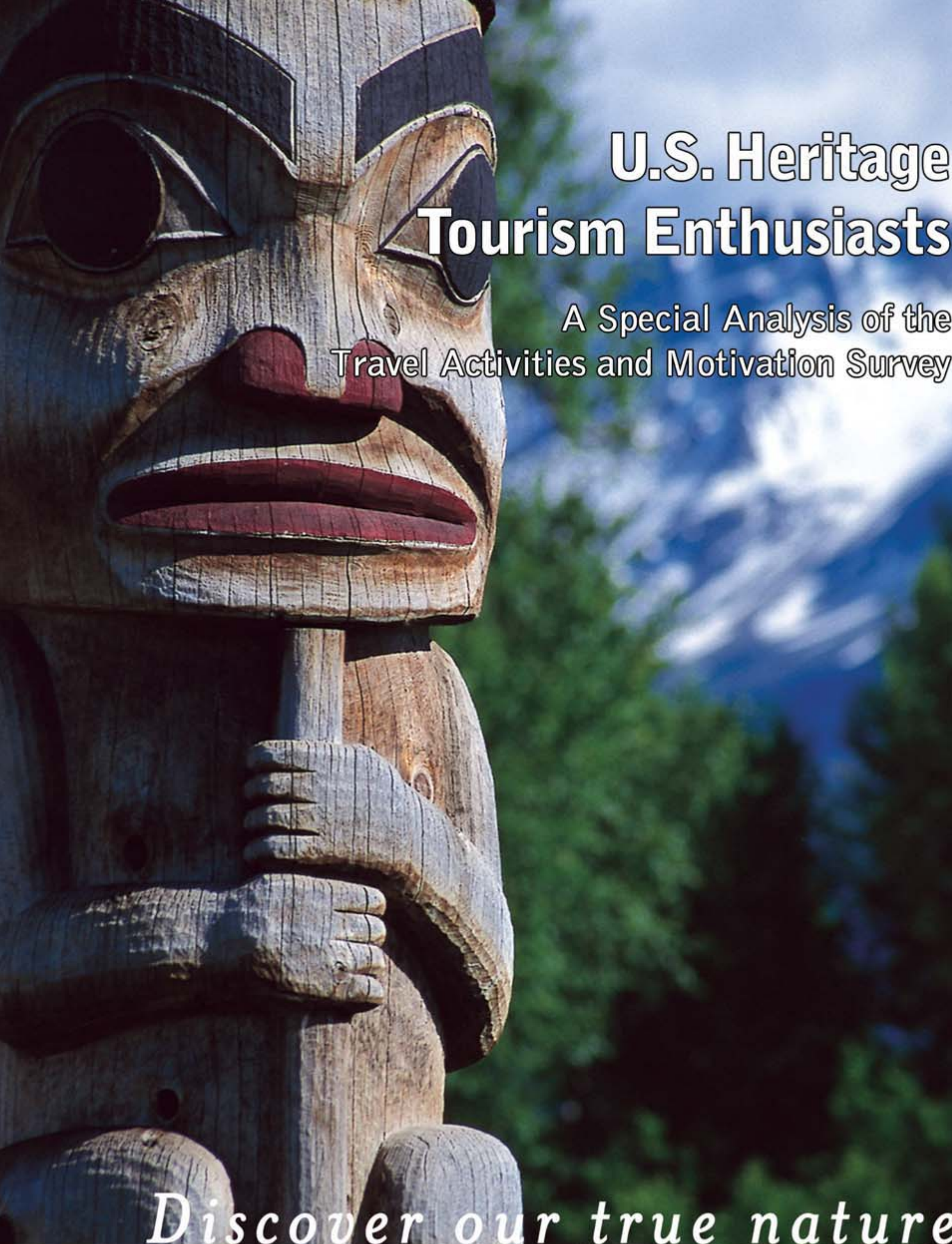
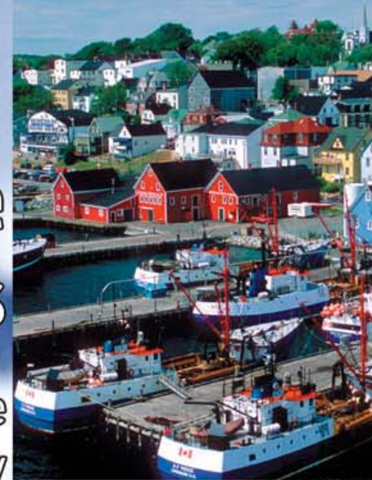


U.S. Heritage Tourism Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey



TAMS

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Canadian Tourism Commission

Commission canadienne du tourisme

Canada

U.S. Heritage Tourism Enthusiasts

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

Prepared for:

The Canadian Tourism Commission (CTC)

Prepared by:

Research Resolutions
& Consulting Ltd.

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Lunenburg (N. S.), a UNESCO World Heritage Site
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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 **Heritage Tourism Enthusiasts** – Americans who have taken leisure trips in Canada and exhibit a particular interest in heritage-oriented activities when they travel. As such, they have taken leisure trips in Canada and, in many cases, to other destinations in the past couple of years and have included at least four of the following activities on these trips.

- Aboriginal cultural experiences in a rural setting
- Pow Wow/other Aboriginal celebration
- Aboriginal attractions
- French Canadian cultural experiences
- carnivals such as Mardi Gras
- western theme events
- farmers' fairs or markets
- local festivals or fairs
- children's museums
- general history museums
- science or technology museums
- historical replicas of cities/towns
- historic sites
- pick your own farms / harvesting

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

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

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

2. Executive Summary

2.1 Heritage Tourism Enthusiasts: Market Size

Of the 200.4 million American adults in 2000, about 34.5 million are Heritage Tourism Enthusiasts (17%). Of these, almost 1-in-4 claim to have taken a leisure trip within Canada during the past two years or so. Thus, Canada's market for the heritage segment is approximately 8.3 million American adults.

Canada draws a disproportionately high number of its Heritage Tourism Enthusiasts from border states: 18 per cent of the total U.S.A. population live in states on the Canada/U.S. border while 28 per cent of Heritage Tourism Enthusiasts who come to Canada do so. Attracting these tourists from the long haul U.S.A. markets poses a greater challenge: 54 per cent of Americans live in Tier III states but only 40 per cent of Heritage Tourism Enthusiasts who come to Canada live in this southern band of states. At the same time, a higher proportion of Heritage tourists come from long haul markets (40%) than do travellers to Canada as a whole (35%), suggesting particular success in attracting these potentially high spending travellers with heritage products.

Heritage 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%), followed by British Columbia (33%) and Quebec (32%). Smaller proportions visit Atlantic Canada (15%) and the Prairie provinces – Alberta (10%) and Manitoba/Saskatchewan (7%).

The single exception to the "typical" destination pattern for Americans who come to Canada on leisure trips is Quebec. Possibly because of the predominance of the French language and the old world architecture of Quebec City and Old Montréal, one-third of Heritage 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 Heritage 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 (25%). They have a particularly strong interest in Europe (28%) and destinations in other countries (21%).

2.2 Heritage Tourism Enthusiasts: Demographic Characteristics

Compared to the total market for all leisure tourism experiences over the past couple of years, Heritage Tourism Enthusiasts are substantively under-represented among younger Americans, and especially among those between 18 and 34 years. This age group represents 1-in-4 U.S.A. travellers as a whole (24%) but less than 1-in-5 Heritage Tourism Enthusiasts (18%).

Most Heritage Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Fewer than one-third are likely to be in the market for heritage experiences that take into account the interests and needs of teenagers or children (30%).

Heritage Tourism Enthusiasts are also somewhat more affluent than is the "typical" American traveller in Canada, with an average household income of $71,100 (US$) compared to $65,200 (US$) for the typical leisure visitor to Canada (1998 dollars). Higher household incomes are consistent with higher levels of formal education: over one-third of Heritage Tourism Enthusiasts have at least one university degree (34%) and a further one-half (49%) have had some post-secondary education.

2.3 Heritage Activities among Heritage Tourism Enthusiasts

By definition, Heritage Tourism Enthusiasts participate in multiple heritage-related activities while on trips. They may have engaged in these activities while on a recent trip to Canada or on trips to other destinations, worldwide. The most popular heritage activities – sought by between one-half and one-third of these tourists while on a trip in the past couple of years – span museums, farmers' markets, festivals and historic sites.

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

- General history museums (81%)
- Farmers' fairs or markets (68%)
- Local festivals or fairs (67%)
- Science & tech museums (64%)
- Historic sites (63%)
- Historical replicas of cities (55%)

Other heritage activities that attract between 10 per cent and 30 per cent of Heritage Tourism Enthusiasts include children's museums, Aboriginal cultural experiences or attractions, French Canadian cultural experiences, harvesting, western theme events, and carnivals such as Mardi Gras.

Activities Engaged in by 10 per cent to 30 per cent of Heritage Tourism Enthusiasts

- Children's museums (28%)
- Aboriginal attractions (28%)
- French Canadian cultural experiences (26%)
- Pick-your-own farms/harvesting (25%)
- Aboriginal cultural experiences (23%)
- Western theme events (21%)
- Carnivals (15%)
- Pow Wows/Aboriginal celebrations (12%)

2.4 Overlap With Other Activity-Based Segments

U.S.A. Heritage Tourism Enthusiasts with recent leisure travel experiences in Canada have relatively wide-ranging tourism interests. Over half of this market segment are also Visual Arts Enthusiasts (4.4 million), more than one-third fall into the Wine and Culinary Enthusiast market (3.1 million) and slightly fewer are also Performing Arts Enthusiasts (2.6 million).

Nature-based tourism experiences also appeal to Heritage tourists – over one-third are Soft Outdoor Adventure Enthusiasts (2.9 million).

These overlaps suggest considerable opportunities for cross-market packaging and promotion of indoor and outdoor tourism products within the Heritage Tourism Enthusiast market that comes to Canada from the U.S.A.

2.5 Image Challenges & Media Sources

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

- A place with beautiful scenery;
- Clean and well cared for;
- A great place for fishing;
- 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;
- A great place for hunting.

Ratings for having many cultural attractions and events and seeing important historical sites and significant places in history, along with being a place to experience different cultures and ways of life, fall below the many outdoor-oriented characteristics including those highlighted above. These heritage and culture-oriented attributes achieve lower levels of support from Heritage Tourism Enthusiasts from the U.S.A. than do dimensions such as one of best destinations for outdoor activities, experiencing adventure and excitement, being safe for visitors, being clean and well cared for, friendliness, and a destination with a lot for young people to see and do.

Americans are only moderately impressed with Canada as a location in which to experience different cultures, see historic sites and important places in history, and Aboriginal culture. Those in the Heritage Tourism Enthusiast segment are least positive about Canada as a destination with a popular or trendy image and as one to visit in the winter.

Image building and product awareness messages to Heritage Tourism Enthusiasts are likely to achieve the highest reach in daily and weekend editions of local newspapers, including the travel sections of these editions and through the American Automobile Association (AAA). Membership lists from art galleries, museums, botanical gardens and zoos might also be useful tools for reaching Heritage Tourism Enthusiasts in the U.S.A. since they are members of these types of organizations at much higher rates than is the typical American adult.

2.6 Impacts of Population Changes

Three fundamental changes in the U.S.A. population structure might be taken into account in tourism planning and product development in Canada 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 decline to less than 3-in-10 by 2025 (29%).

2.7 Implications for Heritage Tourism Enthusiasts

There will be an increase in the absolute number of Americans who will be in the market for heritage activities between 2000 and 2025, from an estimated 34.5 million now to about 47.1 million in 2025. Canada's likely share of this market – those who will seek heritage experiences and take leisure trips to Canada – is also expected to grow substantively, from 8.3 million to 12.3 million.

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

Assuming that behaviour patterns evident in 2000 are sustained to 2025, the Heritage segment will be the largest of the market segments identified by the CTC as ones of special interest. At a predicted 12.3 million heritage tourists who take leisure trips to Canada by 2025, this segment is expected to out-perform Visual Arts Enthusiasts (9.2 million), Soft Outdoor Adventure Enthusiasts (8.8 million), wine/culinary tourists (7.5 million) and Performing Arts Enthusiasts (5.1 million) by wide margins.

2.8 Summary

The Heritage Tourism Enthusiast market for Canada from the U.S.A. is characterized by its relative age, affluence and post-secondary education.

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

Of the activity segments of special interest to the CTC, Heritage Tourism Enthusiasts currently represent the largest pool of potential visitors for Canada's tourism businesses – 34.5 million adult Americans. Of this sizeable pool, only 1-in-4 have taken recent leisure trips to Canada (8.3 million), leaving considerable opportunity for growth.

The potential in-bound American market has considerable growth potential over the next two decades, in large part because it appeals to older people – the segment that will experience the greatest "growth spurt" between now and 2025.

There is a relatively strong link between Heritage Tourism Enthusiasts and outdoor enthusiasts that could be used for cross-marketing and packaging. Such efforts may have to take into account the need for varying levels of physical exertion so that tourism businesses can continue to attract the energetic, action-oriented youth and family markets but can also attract the increasing number of older Americans who may retain their interest in the outdoors but will require gentler outdoor experiences.

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

3. U.S.A. Heritage Tourism Enthusiasts – 2000

3.1 Market Size & Overlap With Other Activity Groups

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

Of the 200.4 million American adults in 2000, about 34.5 million are Heritage Tourism Enthusiasts (17%). Of these, about one-quarter claim to have visited Canada on a leisure trip in the past two years. Thus, the market for Canada's heritage products is about 8.3 million American adults (8,326,000).

Of the activity-based market segments of special interest to the CTC, Heritage Enthusiasts (34.5 million) are second only to Soft Outdoor Adventure Enthusiasts, followed at a considerable distance by Visual Arts Enthusiasts (27.6 million) and alpine skiers (21.4 million).

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

	USA Adults	Recent Leisure Travellers in Canada	
	Total	Total	Heritage Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*8.3 million*
Heritage	**34.5**	**8.3**	**8.3**
Wine/Culinary	21.6	5.5	3.1
Performing Arts	15.6	3.8	2.6
Visual Arts	27.6	7.0	4.4
Soft Outdoor Adventure	35.5	7.1	2.9
Hard Outdoor Adventure	15.7	3.2	1.6
Winter Outdoors (excluding alpine skiing)	15.0	3.7	1.7
Alpine Skiing	21.4	4.6	1.7

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

Within the sub-group of Americans who have recent travel experience in Canada, the 8.3 million Heritage Tourism Enthusiasts represent the largest single market segment evaluated in this project. Other major market segments include Visual Arts (7.0 million) and Soft Outdoor Adventure Enthusiasts (7.1 million).

Heritage Tourism Enthusiasts with recent Canadian leisure travel experiences have relatively wide-ranging tourism interests. One-half of these Americans are also Visual Arts Enthusiasts and about one-third are Soft Outdoor Adventure Enthusiasts, Wine/Culinary Enthusiasts and/or Performing Arts Enthusiasts. These overlaps suggest packaging, product development and marketing opportunities: sub-groups within the Heritage Tourism Enthusiast segment might be attracted by *combinations* of products that meet their interests in museums, galleries, Aboriginal events, theatre, other live performances, and food and wine experiences as well as their interests in the outdoors.

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 Americans – the Heritage Tourism Enthusiast segment represents about one-third. This proportion is higher than that evident for any of the other segments of stated interest to the CTC.

Table 2: Market Share of Key Segments

	USA Adults	Recent Leisure Travellers in Canada	
Millions of Adults 18+	**Total**	**Total**	**Any Cultural Activities**
Heritage	17%	32%	35%
Wine/Culinary	11%	21%	23%
Performing Arts	8%	14%	16%
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, page 7-1.

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 Heritage Tourism Enthusiasts, or 2.3 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 Heritage Tourism Enthusiasts are over-represented in the *near* markets.

Heritage Tourism Enthusiasts who live in the mid-tier states are at close to parity with the proportion of the American adult population that live in these states and with the flow of Americans to Canada as a whole. In contrast, heritage travellers are more apt to live in U.S.A. *long haul* states (Tier III) than is the U.S.A. visitor market to Canada in total (40% for Heritage Tourism Enthusiasts versus 35% for all leisure travellers to Canada). Despite the relative success in attracting long haul American visitors to Canada evident within the heritage sector, Americans who live furthest from Canada are under-represented. Over half of the U.S.A. population lives in Tier III states (54%), suggesting that while Canada is making important inroads among Heritage Tourism Enthusiasts (40%), there is still opportunity for growth in this potentially lucrative long haul market.

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

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Heritage Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*8.3 million*
Tier I (Border States)	18%	33%	28%
Tier II	28%	32%	33%
Tier III	54%	35%	40%

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

The only region that has a noticeably higher proportion of Heritage Tourism Enthusiasts with Canadian experience than would be expected in light of the U.S. population distribution as a whole is East North Central. This region includes major population centres such as Illinois, Michigan and Ohio and represents 16 per cent of total population but 22 per cent of Heritage Tourism Enthusiasts. Conversely, West South Central, including Texas is the only region in which Heritage Tourism Enthusiasts seem to be significantly under-represented (11% of total population; 7% of Heritage Tourism Enthusiasts). For more regional information, please refer to Summary Table A-2, appended.

Heritage 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%), followed by British Columbia (33%) and Quebec (32%). Smaller proportions visit Atlantic Canada (15%) and the Prairie provinces – Alberta (10%) and Manitoba/Saskatchewan (7%).

The single exception to the "typical" destination pattern for Americans who come to Canada on leisure trips is Quebec. Possibly because of the predominance of the French language and the old world architecture of Quebec City and Old Montréal, one-third of Heritage 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 Heritage 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 (25%). They have a strong interest in European destinations (28%) and those in other countries (21%). In fact, heritage tourists' interest in destinations outside North America is appreciably higher than the "typical" U.S.A. traveller to Canada, reinforced, no doubt, by their interest in exploring other cultures and ways of life.

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

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Heritage Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*8.3 million*
Canadian Destinations	13%	100%	100%
Atlantic Canada	2%	12%	15%
Quebec	3%	25%	32%
Ontario	7%	55%	58%
Manitoba/Saskatchewan	1%	7%	7%
Alberta	1%	10%	10%
British Columbia	4%	30%	33%
Territories	1%	4%	3%
Other Destinations			
Any U.S.A. Destination	69%	93%	96%
Mexico/Caribbean	15%	25%	25%
U.K./Other Europe	8%	18%	28%
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 per cent because of multiple destinations.

3.3 Demographic Characteristics of Heritage Tourism Enthusiasts

Heritage Tourism Enthusiasts are almost equally likely to be men and women and are slightly more concentrated at the older end of the adult age spectrum than are American leisure travellers to Canada as a whole. Over 1-in-3 of them are at least 55 years of age.

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

	Recent Leisure Travellers in Canada	
	Total	Heritage Enthusiasts
Adults 18+	*26.3 million*	*8.3 million*
Men	51%	51%
Women	49%	49%
18 - 34 years	24%	18%
35 - 44 years	20%	22%
45 - 54 years	20%	20%
55 - 64 years	14%	16%
65+ years	17%	18%
Average Age	47.3 years	48.9 years

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

Compared to the total market for all leisure tourism experiences over the past couple of years, U.S.A. Heritage Tourism Enthusiasts are substantively under-represented among younger Americans, and especially among those between 18 and 34 years of age. This age group represents 1-in-4 American travellers as a whole (24%) but less than 1-in-5 Heritage Tourism Enthusiasts (18%). Under-representation at the younger end of the age spectrum brings the average age of Heritage Tourism Enthusiasts to about 49 years – somewhat older than the 47 years average age for American leisure tourists to Canada in total.

Heritage Tourism Enthusiasts span the income and education spectrums, with about one-fifth falling into a relatively low income group (under $40,000 US), the same proportion claiming to have household incomes in the $40,000 to $60,000 range (US$, 22%) and one-third indicating that their household income was between $60,000 to $100,000 (US$, 34%). Incomes in excess of $100,000 (US$) are characteristic of close to one-quarter of these heritage enthusiasts (23%).

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

	Recent Leisure Travellers in Canada	
	Total	Heritage Enthusiasts
Adults 18+	*26.3 million*	*8.3 million*
Household Income (US$)		
Under $40,000	26%	22%
$40,000 - $59,999	24%	22%
$60,000 - $99,999	31%	34%
$100,000 or more	19%	23%
Average	$65,200 US	$71,100 US
Education		
Some Secondary or Less	6%	3%
Completed Secondary	19%	13%
Some Post Secondary	45%	49%
Graduated University	30%	34%

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

This income pattern differs from that of all recent American leisure travellers to Canada: within the Heritage Tourism Enthusiast segment there are fewer *low* and *low-middle* income Americans and more *high-middle* and *high* income Americans than there are among U.S.A. travellers as a whole. The average household income for the typical American leisure visitor to Canada is $65,200 (US$) and the average for the sub-group with a particular interest in heritage is $71,100 (US$).

Higher household incomes are consistent with higher levels of formal education: more than 1-in-3 Heritage Tourism Enthusiasts have at least one university degree (34%) and a further half have had some post-secondary education (49%).

Most Heritage Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Close to one-third are likely to be in the market for heritage experiences that take into account the interests and needs of teenagers or children (30%). While adult-only households predominate among Heritage Tourism Enthusiasts (70%), almost one-quarter of these Americans live in households with children under twelve years of age (23%). The household composition of this market segment is almost identical to that of the typical American leisure tourist to Canada.

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

	Recent Leisure Travellers in Canada	
	Total	Heritage Enthusiasts
Adults 18+	*26.3 million*	*8.3 million*
Adult Only	71%	70%
Any Teens/Children	29%	30%
Any Children under 12	22%	23%

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

3.4 Travel Activities Among Heritage Tourism Enthusiasts

3.4.1 Heritage Activities

Of the activities used to define Heritage Tourism Enthusiasts, general history museums are the most popular. Approximately 8-in-10 of these enthusiasts claim to have gone to one of these attractions on a leisure trip in the past couple of years. It is important to note that even though these Heritage Tourism Enthusiasts travelled within Canada during the past several years, the survey findings do not provide an indication of whether their museum experiences or any other activities discussed in this report took place on a *Canadian* trip.

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

	Heritage Enthusiasts
Adults 18+	*8.3 million*
General history museums	81%
Farmers' fairs or markets	68%
Local festivals or fairs	67%
Science & tech museums	64%
Historic sites	63%
Historical replicas of cities/towns	55%
Children's museums	28%
Aboriginal attractions	28%
French Canadian cultural experiences	26%
Pick your own farms/harvesting	25%
Aboriginal cultural experiences in remote or rural setting	23%
Western theme events	21%
Carnivals such as Caribana/Mardi Gras or Rio's Carnival	15%
Pow Wow/other Aboriginal celebrations	12%

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

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

About one-quarter of the Americans in this market segment say they go to children's museums, Aboriginal attractions, seek French Canadian cultural activities, harvesting or "pick-your-own" farm experiences or take in Aboriginal cultural experiences in remote settings while on their travels. Western theme events such as the Calgary Stampede capture the interest of approximately 1-in-5 Heritage Tourism Enthusiasts and fewer claim to go to carnivals such as Caribana or Mardi Gras or to Pow Wows or other Aboriginal celebrations

3.4.2 Performing & Visual Arts Activities

Heritage Tourism Enthusiasts are also apt to attend live theatre productions while on their trips (57%), but are less enthusiastic about music: classical music concerts (28%), jazz concerts (22%), music festivals (20%), and opera (15%). About one-fifth go to dance performances (22%) and even fewer go to theatre festivals while on trips (17%). These participation rates in travel activities that characterize American Performing Arts Enthusiasts reflect the substantive degree of overlap between the Heritage and Performing Arts segments and suggest a special enthusiasm for live theatre.

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

	HERITAGE ENTHUSIASTS
Adults 18+	*8.3 million*
Performing Arts	
Theatre	57%
Classical music concerts	28%
Jazz music concerts	22%
Ballet or other dance	22%
Music festivals	20%
Theatre festivals	17%
Opera	15%
Musical attractions such as Jazzland	13%
Literary festivals	9%
Visual Arts	
Local arts & crafts studios	79%
Art galleries	66%
International film festivals	5%

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

While they may seek out live theatre when they travel, Heritage Tourism Enthusiasts are appreciably more inclined to shop or browse in local arts and crafts studios (79%) and are somewhat more likely to go to art galleries while on their trips (66%). Again, these high levels of overlap with activities used to define the Visual Arts Enthusiast segment are suggestive of cross-marketing and packaging opportunities for American heritage visitors.

3.4.3 Other Attraction-Based Activities

American travellers, regardless of which segment they fall into, seem especially fond of going to zoos and aquariums on their travels. Thus, it is not surprising that over half of those who have visited Canada in the past couple of years and are Heritage Tourism Enthusiasts claim to have sought these attractions while on trips in the recent past.

Table 10: U.S.A. Heritage Tourism Enthusiasts – Other Activities

	HERITAGE ENTHUSIASTS
Adults 18+	*8.3 million*
Zoos	66%
Aquariums	59%
Botanical gardens	57%
Casinos	44%
Planetariums	31%
Horse races	19%
Auto races	13%

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

Botanical gardens and casinos are also relatively common travel experiences among Heritage Tourism Enthusiasts, with over half claiming to have visited a botanical garden and over 2-in-5 saying they have gone to a casino while on a trip over the past two years or so.

3.4.4 Outdoor Activities

Of the outdoor activities used to define the CTC's *Soft Outdoor Adventure Enthusiast* market segment, hiking and backpacking in wilderness settings is the most popular among Heritage Tourism Enthusiasts from the U.S.A. (38%). About one-third of these heritage experience seekers also claim to go cycling and one-quarter go kayaking or canoeing, motor boating or horseback riding while on trips. Alpine skiing also has a following within the Heritage Tourism Enthusiast market, attracting about one-fifth of these Americans on trips over the past couple of years engaging in this sport.

Table 11: U.S.A. Heritage Tourism Enthusiasts – Outdoor Activities Used To Define Soft Outdoor Adventure Market Segment

	HERITAGE ENTHUSIASTS
Adults 18+	*8.3 million*
Hiking/backpacking in wilderness settings	38%
Cycling	33%
Kayaking or canoeing	24%
Motor boating	24%
Horseback riding	23%
Downhill skiing	19%
Sailing	14%
Cross-county skiing	12%
Snowmobiling	9%
Motorcycling	5%
Hot air ballooning	4%
Snowboarding	3%
Wind surfing	1%

Source: Special TAMS Tabulations, Table 8.

Other outdoor activities have even greater appeal to Heritage Tourism Enthusiasts. They tend to be encounters with the outdoors that are less strenuous than those used to define Soft Outdoor Adventure Enthusiasts – activities such as wildlife (58%) and wildflower viewing (53%).

Fishing attracts about one-third of Heritage Tourism Enthusiasts while golfing, bird and/or whale watching attract about one-quarter of these Americans. About half this proportion claim to have sought white water rafting experiences on trips in the past couple of years (15%).

Table 12: U.S.A. Heritage Tourism Enthusiasts – Other Outdoor Activities

	HERITAGE ENTHUSIASTS
Adults 18+	*8.3 million*
Wildlife viewing	58%
Wildflowers / flora viewing	53%
Fishing	35%
Golfing	27%
Whale watching	27%
Bird watching	25%
White water rafting	15%
Seeing northern lights/other artic experiences	10%
Scuba diving	10%

Source: Special TAMS Tabulations, pages 8-1/5.

3.5 Ratings of Canada

Heritage Tourism Enthusiasts from the U.S.A. who have visited Canada in the past couple of years 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 Heritage Tourism Enthusiast segment who refrain from offering an opinion.

In this context, Canada is most highly rated by Heritage Tourism Enthusiasts from the U.S.A. for attributes that support an *outdoors* image rather than ones that support a *heritage* image:

- A place with beautiful scenery;
- Clean and well cared for;
- A great place for fishing;
- 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;
- A great place for hunting.

It should be noted that a considerable minority of Heritage Tourism Enthusiasts are unable or unwilling to rate Canada for its fishing and hunting. Nonetheless, among those who do offer a rating, these dimensions achieve appreciably higher image ratings than do attributes associated with the cultural opportunities Canada has to offer.

In fact, ratings for having many cultural attractions and events and seeing important historical sites and significant places in history, along with being a place to experience different cultures and ways of life, fall below many outdoor-oriented characteristics including those highlighted above. These heritage and culture-oriented attributes achieve lower levels of support from Heritage Tourism Enthusiasts than do dimensions such as one of best destinations for outdoor activities, experiencing adventure and excitement, being safe for visitors, being clean and well cared for, friendliness, and a destination with a lot for young people to see and do.

Americans are only moderately impressed with Canada as a location in which to experience different cultures, see historic sites and important places in history, and Aboriginal culture. Those in the Heritage Tourism Enthusiast segment are least positive about Canada as a destination with a popular or trendy image and as one to visit in the winter.

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

- A place with many cultural events and attractions;
- great place for Aboriginal culture; and
- great place to experience different cultures.

In light of the considerable competition for travel to U.S. and European destinations by these Heritage Tourism Enthusiasts, efforts may be required to bolster Canada's image as a *heritage* destination.

Table 13: U.S.A. Heritage Tourism Enthusiasts – Attitudes Toward Canada

	Recent Leisure Travellers to Canada		
	Total	Heritage Enthusiasts	
Adults 18+	*26.3 million*	*8.3 million*	
	Average #	Average #	Can't Rate %
Beautiful scenery	9.2	9.3	4%
Clean/well cared for	8.7	8.9	6%
Great place for fishing	8.7	8.8	37%
Lots for mature adults	8.6	8.7	13%
Great place to relax	8.6	8.6	6%
Lots for families	8.5	8.6	13%
Place with friendly people	8.4	8.6	6%
Great place for hunting	8.4	8.6	49%
Respects natural environment	8.5	8.5	11%
Safe for visitors	8.3	8.5	12%
One of best destinations for outdoor activities	8.2	8.3	16%
Lots for young adults	8.1	8.3	28%
Great place to experience adventure & excitement	8.0	8.2	15%
One of best summer destinations	8.1	8.2	11%
Place with interesting shops	8.0	8.2	12%
Offers excellent value for money	7.9	8.2	9%
Many cultural events & attractions	7.8	8.1	11%
Great place to experience city life	7.7	7.9	11%
Great place to experience different cultures	7.6	7.8	12%
Great place to see historic sites	7.5	7.6	10%
Great place for Aboriginal culture	7.4	7.6	30%
Place for romance	7.2	7.4	27%
Great place to experience "good life"	7.1	7.4	23%
Popular, trendy place	6.6	6.6	23%
One of best winter destinations	6.3	6.2	24%

Source: Special TAMS Tabulations, page 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 Heritage Tourism Enthusiasts

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

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

Americans in the Heritage Tourism Enthusiast segment are avid local newspaper readers, with almost all of them claiming to read a weekday or weekend edition of their local paper on a regular basis (92%). Furthermore, close to two-thirds of them claim to read the travel section of weekday editions of daily newspapers regularly and three-quarters claim to read or look through the travel section of the weekend local newspaper.

Table 14: U.S.A. Heritage Tourism Enthusiasts – Print Media Read Regularly

	HERITAGE ENTHUSIASTS
Adults 18+	*8.3 million*
Daily Newspaper (Any)	**92%**
Weekday edition	84%
Travel section of weekday edition	63%
Weekend edition	88%
Travel section of weekend edition	76%
Community newspapers	80%
Any Magazines	**95%**
Travel magazines	52%
National Geographic	46%
Sports magazines	28%
Hobby magazines	47%
News magazines	51%
Fashion/homemaking magazines	33%
General interest/city life magazines	25%

Source: Special TAMS Tabulations, page 14.

These tourists are also avid magazine readers (95%), with over half reading travel magazines on a regular basis (52%). Almost the same proportion claims to read National Geographic regularly (46%). 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 Visual and Performing Arts tourists.

Daily and weekend newspapers may have better reach among Heritage Tourism Enthusiasts than does any particular type of television programming. Two-thirds of these tourists say they watch televised movies on a regular basis and close to the same proportion claim to watch nature shows regularly (63%). Professional sports broadcasts are particularly popular among these Heritage Enthusiasts (59%). The early evening news and evening dramas are also viewed regularly by at least half of Heritage Tourism Enthusiasts on a regular basis.

Table 15: U.S.A. Heritage Tourism Enthusiasts – Television Programs Viewed Regularly

	HERITAGE ENTHUSIASTS
Adults 18+	*8.3 million*
Movies	68%
Early evening news	64%
Nature shows	63%
Professional sports	59%
Evening drama	52%
Evening sitcoms	49%
Late evening news	48%
Instructional/hobby shows	44%
Morning news	44%
Daytime programs on weekdays	18%

Source: Special TAMS Tabulations, page 16.

Heritage Tourism Enthusiasts belong to art galleries or museums (25%) and zoos or botanical gardens (17%) at appreciably higher rates than do Americans at large (9%, each), suggesting that the mailing lists of these types of organizations might prove useful as communication tools to reach Heritage Tourism Enthusiasts from the U.S.A. Over half of them 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 16: U.S.A. Heritage Tourism Enthusiasts – Club/Organization Memberships

	HERITAGE ENTHUSIASTS
Adults 18+	*8.3 million*
Auto club	59%
Sports club	29%
Nature organization	18%
Art gallery/museum	25%
Zoo/botanical garden	17%
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 Heritage Tourism Enthusiast market is discussed.

4.2 An Aid to the Reader

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

Sample Table

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 17: Shifts in USA Adult Population

Adults 18+ in Millions	U.S.A. Adult Population In . . . 2000	2025	Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
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 18: 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 19: 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 20: 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 21: 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 Heritage Tourism Enthusiasts

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

Because the U.S.A. population will shift over the next two decades towards an older and childless one, the very characteristics that define Heritage Tourism Enthusiasts help explain why growth in this market is predicted to be 36 per cent **higher** than would have been expected given today's population structure. The total Heritage Tourism Enthusiast market in the U.S.A. is predicted to grow from 34.5 million in 2000 to 47.1 million by 2025.

An even more dramatic increase is evident for changes in the Heritage Tourism Enthusiast segment that takes leisure trips to Canada. This population is expected to increase from 8.3 million now to 12.3 million in 2025. At 47 per cent, this growth rate is about 76 per cent **higher** than would have been expected given today's population structure.

Table 22: 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 Heritage Enthusiasts	34.5	47.1	36%	36%
Heritage Enthusiasts Who Take Leisure Trips to Canada	**8.3**	**12.3**	**47%**	**76%**
Other CTC Activity Groups - Leisure Trips in Canada				
Soft Outdoor Adventure Enthusiasts	7.1	8.8	25%	-7%
Hard Outdoor Adventure Enthusiasts	3.2	3.8	20%	-25%
Alpine Skiing	4.6	5.7	25%	-8%
Other Winter Outdoors	3.7	4.7	26%	-2%
Performing Arts Enthusiasts	3.8	5.1	35%	30%
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

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 are more apt to be older. Assuming that behaviour patterns evident in 2000 are sustained to 2025, the Heritage segment will be the largest of the market segments identified by the CTC as ones of special interest. At a predicted 12.3 million heritage tourists who take leisure trips to Canada by 2025, this segment is expected to out-perform Visual Arts Enthusiasts (9.2 million), Soft Outdoor Adventure Enthusiasts (8.8 million), wine/culinary tourists (7.5 million) and Performing Arts Enthusiasts (5.1 million) by wide margins.

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 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 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 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. Heritage Tourism Enthusiasts – Census Regions

	USA Adults	Recent Travellers to Canada	
	Total 200.4 million	Total 26.3 million	Heritage Enthusiasts 8.3 million
New England	5%	8%	5%
Mid Atlantic	14%	19%	16%
South Atlantic	18%	12%	18%
East North Central	16%	23%	22%
West North Central	7%	5%	5%
East South Central	6%	3%	4%
West South Central	11%	5%	7%
Mountain	6%	6%	7%
Pacific	15%	18%	17%

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