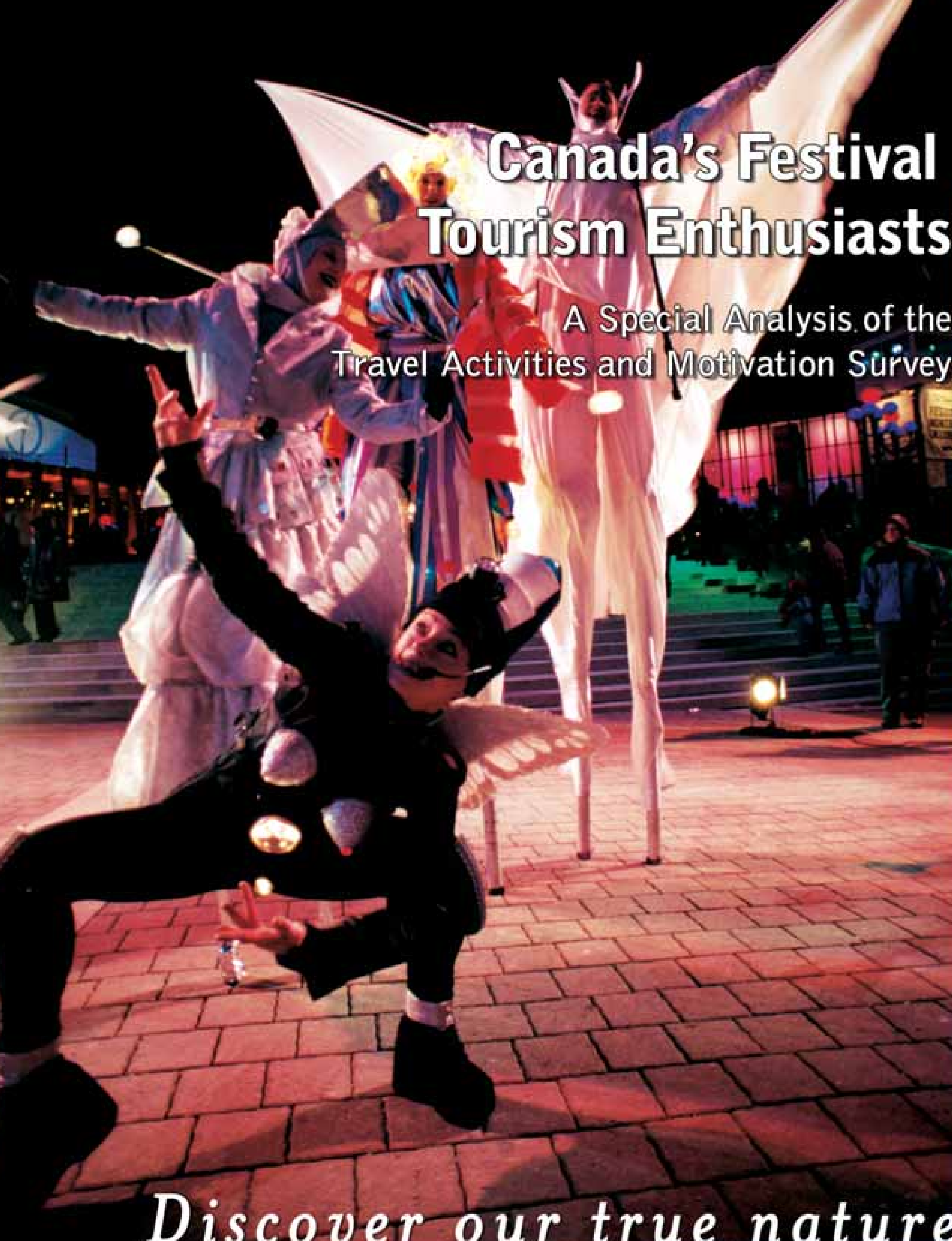

Canada's Festival Tourism Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey

TAMS

Discover our true nature

Canadian Tourism Commission

Commission canadienne du tourisme

Canada

Canada's Festival 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.

Photo credits:

Photo (Main):	The *Montréal High Lights* Festival, Montréal, Québec
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Photo (Top):	*Graffiti – Mural* (Churchill Square, Edmonton, Alberta)
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Photo (Middle):	The *Great Northern Arts* Festival, Inuvik (NWT)
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Photo (Bottom):	The *Toronto International Film Festival* (Toronto, Ontario)
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1. Introduction

Canada's festival organizers, tourism packagers, operators and Destination Marketing Organizations (DMOs) require information about what tourists *do* when they travel in order to maximize their ability to package, promote and attract tourists. To address this need, the Canadian Tourism Commission (CTC) commissioned Research Resolutions & Consulting Ltd.[1] to undertake a special analysis of **Festival Tourism Enthusiasts,** based on the Travel Activities and Motivation Survey (TAMS).[2]

This report describes the characteristics and tourism activity preferences of Canada's Festival Tourism Enthusiasts - Canadians who exhibit a particular interest in festivals when they travel.[3] As such, they have taken leisure trips in Canada and, in many cases, to other destinations in the past couple of years.

It is important to note that the activity list in the TAMS questionnaire was established in 1998/1999 by tourism researchers who were not festival or cultural specialists. Thus, the list may include items that are not consistent with standard industry taxonomies and definitions. In spite of this limitation, the survey constitutes one of the few rigorous sources of information on the **tourist market** for Canada's festivals and cultural events.

To qualify as a *high intensity* member of the **Festival Tourism Enthusiast** market segment, adult respondents had to have claimed to take at least one recent trip that included the activities shown below.

Festival Tourism Enthusiasts

At least one as an activity on a recent leisure trip:	***AND at least one:***	***OR at least three as an activity on a recent leisure trip:***
Aboriginal Celebrations	Carnivals	Aboriginal Celebrations
Music Festivals	Western Theme Events	Music Festivals
Theatre Festivals	International Film Festivals	Theatre Festivals
	Literary Festivals	Carnivals
	Local Festivals Or Fairs	Western Theme Events
		International Film Festivals
		Literary Festivals
		Local Festivals Or Fairs

[1] Research Resolutions & Consulting Ltd., 16 Hepbourne Street, Toronto, Ontario M6H 1J9. Tel 416/531-9973 Fax 416/534-1372 E-mail rogers.judy@sympatico.ca

[2] An association of Canadian tourism ministries and organizations has 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. See Appendix for more details.

[3] In addition to participating in the specified activities, these enthusiasts have taken an overnight leisure trip in Canada in the past two years.

Two **subsets** of this broadly defined high intensity market are examined in greater detail within this report.

Performing Arts Festival Tourism Enthusiasts: At least two of the following as an activity on a recent leisure trip[4]:

Music Festivals	Literary Festivals
Theatre Festivals	

Themed Community Festival Tourism Enthusiasts: At least two of the following as an activity on a recent leisure trip:

Aboriginal celebrations	Western Theme Events
Carnivals	

These tourists provide a rich source of information for festival planners, tourism packagers, and DMOs that want to increase or retain the Festival Tourism Enthusiast market in Canada in the future.

In addition to a *current* profile of Festival Tourism Enthusiasts, the TAMS survey has been modified to permit an assessment of the impacts of an aging population on market potential for this group. Using population projections for Canada obtained from Statistics Canada, TAMS data were "aged" twenty-five years into the future.[5]

Comparisons of the market size, composition, and travel behaviour of Canadians in 2000 with estimates of the market profile in 2026 provide tourism planners and marketers with critical information about the products and services that may be required in the future to attract tourists from Canada's largest market – Canadians travelling in Canada. The final chapter of this report is devoted to the impacts of population changes on the domestic Festival Tourism Enthusiast market.

Toronto
October 2003

[4] An *Arts Tourism Enthusiast* subgroup was also formed, but is identical in composition to the *Performing Arts Tourism Enthusiast* sub-group. The more specific sub-group is used as the basis of analysis in this report.

[5] 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. Ontario's Ministry of Tourism and Recreation (MTR) supplied figures for each sampling unit used in TAMS for aging the Canadian population and the USA. These projections included MTR's adjustments for increased educational achievement and immigration flows for Canada.

2. Executive Summary

2.1. Market Size

- Of the 23.3 million Canadian adults in 2000, about 2.0 million are Festival Tourism Enthusiasts (9%). Of these, over 8-in-10 claim to have taken a leisure trip within Canada during the past two years or so. Thus, the domestic tourism market for Canada's festivals is approximately 1.7 million adults.
- Festival organizers, tourism packagers, and DMOs might develop marketing and packaging strategies around the overlap between Canadian tourists who go to **performing arts festivals** and those who go to **themed community festivals**. Approximately 4-in-10 or 675,000 of the 1.7 million Canadians in the more broadly defined market segment go to musical, theatre and/or literary festivals or events. Three-in-ten members of the larger market, or 497,000 Canadians go to carnivals such as Mardi Gras, local festivals and fairs, western theme events and rodeos or Pow Wows or other Aboriginal celebrations.
- Canadians from all parts of the country are represented among Festival Tourism Enthusiasts. They are distributed in much the same way as is Canada's adult population as a whole, with the highest concentrations in the country's largest provinces – Ontario, Quebec and British Columbia.
- From a packaging and marketing perspective, festival organizers along with DMOs and tourism packagers might focus on the regions of Canada that have particularly high "attraction rates" for Festival Tourism Enthusiasts.[6] Those that are especially successful in this regard include Atlantic Canada, Alberta and British Columbia. Between two and three times as many Festival Tourism Enthusiasts claim to have visited these provinces than their share of the total adult population would suggest.
- The U.S.A. is a strong competitor for travel within the Festival Tourism Enthusiast segment. Close to two-fifths of these tourists say they have taken a leisure trip to the United States (38%).
- Fewer than 1-in-10 Canadian travellers as a whole claim to have taken a European holiday over the past couple of years (9%) but twice this proportion of Festival Tourism Enthusiasts make this claim (19%). The strong lure of Europe and other countries relative to Canadian travellers as a whole is likely a reflection of Festival Tourism Enthusiasts' strong interest in cultural experiences.

2.2. Demographic Characteristics

- Festival Tourism Enthusiasts are more likely to be women (55%) than they are to be men (45%).
- They span the age spectrum with a concentration among younger Canadians. In fact, 2-in-5 are between the ages of 18 and 34 years, with an average age of close to 41 years. Festival Tourism Enthusiasts are, therefore, somewhat younger than the typical domestic tourist in Canada (average age, 43 years).
- Most Festival Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Nonetheless, close to 3-in-10 might be in the market for festival experiences that take into account the interests and needs of teenagers or children (27%) and almost 2-in-10 might seek content appropriate for children who are twelve years of age or under (19%).
- These enthusiasts span the income and education spectrums. They are less likely to fall into the lowest education group and are more likely to be university graduates than are Canadian travellers as a whole.

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[6] Attraction rates are the ratios of a region's resident population and the number of Festival Tourism Enthusiasts it attracts. Some regions lure higher levels of Festival Tourism Enthusiasts relative to their resident populations than do others. See the Appendix for attraction rates.

- Despite their relatively high levels of education, these enthusiasts do not have especially high household incomes, possibly because they have not reached their full earning potential as a result of their relative youthfulness. Their average household income, at $53,000 (Cnd$) is marginally lower than the average Canadian traveller's at $54,900 (Cnd$).

2.3. Cultural Activities

- **Local festivals and fairs** attract the largest following, with 7-in-10 Festival Tourism Enthusiasts claiming to have included a visit to one on a recent overnight leisure trip. Close to one million, or more than half of these festival enthusiasts, went to a **music festival** and slightly fewer or about 820,000 went to a **theatre festival** on a recent leisure trip. Festivals that are considerably less popular include **literary festivals** at about 1-in-4, western theme events such as the Calgary Stampede at about 1-in-5 Festival Tourism Enthusiasts.
- **International film festivals, Pow Wows and other Aboriginal celebrations,** and **carnivals** such as Marde Gras or Rio's Carnival are included on trip itineraries by no more than 1-in-7 Canadians in this market segment.
- Because Festival Tourism Enthusiasts also go to other types of attractions when they travel, those who are packaging tourism products might consider adding local arts and crafts studios, farmers' fairs or markets, history/heritage museums, art galleries and/or zoos to festival-based packages. These experiences are sought by at least 1-in-2 Festival Tourism Enthusiasts.
- Other activities sought on trips by about 2-in-5 members of this market sector include botanical gardens, science or technology museums and aquariums. About 1-in-3 also seek harvesting or "pick-your-own" farm experiences, or go to historic sites or replicas of cities or towns when on trips, and somewhat fewer go to planetariums or attend French Canadian cultural activities on their travels. These attractions and activities might be included as components of packages and promotions when festival organizers or DMOs attempt to attract Canadians in this market sector.
- There is also an appreciably higher level of participation in many performing arts and wine/culinary activities among tourists in the festival segment than is evident for Canadian travellers as a whole. For example, going to live theatre performances while on trips is popular among 6-in-10 members of the festival segment (60%) but only about half this proportion of typical Canadian travellers in total (27%).
- Perhaps because of their relative youth and their interest in *music festivals,* 2-in-5 festival enthusiasts also go to popular or rock and roll concerts while travelling. This level of interest in popular concerts (43%) is about twice the level evident among Canadian travellers in total (20%).
- Since they are particularly likely to go to theatre, museums, galleries and cultural performances in their home communities, *local* cultural events and venues may prove to be very useful communication routes for reaching potential festival-oriented tourists with messages about festival opportunities in *other* parts of Canada.

2.4. Overlap With Other Activity-Based Segments

- About two-fifths Festival Tourism Enthusiasts share interests with **Heritage** Enthusiasts (716,000), Soft **Outdoor** Adventurers (675,000), **Museums and Related Cultural Institution Enthusiasts** (679,000) and **Performing Arts** Enthusiasts (667,000.
- One-third have an activity profile that coincides with **Visual Arts** Enthusiasts (549,000) and about one-fifth are also **Wine/Culinary** Tourism Enthusiasts (358,000).
- These overlaps suggest opportunities for cross-market packaging and promotion *within* cultural tourism products and *between* festivals and outdoor experiences for the domestic festival tourism market. Outdoor activities with the greatest potential for cross marketing include wildlife and flora viewing.

2.5. Image Challenges & Media Sources

- Canada is most highly rated by domestic Festival Tourism Enthusiasts for attributes that support an *outdoors* rather than a *cultural* or *urban* image:
  - A place with beautiful scenery;
  - One of best destinations for outdoor activities;
  - A place with lots of things for families to see and do;
  - A great place to relax and get away from it all;
  - A place with lots of things for mature adults to see and do;
  - A great place for fishing;
  - One of the best summer destinations.
- They also rate Canada favourably for having a lot for *young people to see and do,* for being *safe,* for offering many *cultural events and attractions*, having *friendly people*, as a place to experience *adventure and excitement*, for being *clean and well cared for*, and, among those who offer an opinion, as a good *hunting* destination.
- Less favourable ratings are accorded attributes associated with to experience different cultures and ways of life including Aboriginal culture, historic sites, having interesting shops, as a city destination and one that respects the natural environment. Canadians in the Festival Tourism Enthusiast segment are least positive about their country as a place for romance, for offering value for money and as a destination with a popular or trendy image.
- Tourists in this market segment have almost identical opinions of Canada as those expressed by Canadian travellers as a whole.
- The fact that Canada does not resonate as a *cultural* destination is cause for some concern if efforts to encourage Canadians in this market segment to travel *in Canada* are to be successful.
- Image building and product awareness messages are likely to achieve the highest reach in daily and weekend editions of local newspapers, including the travel sections of these editions and through the Canadian Automobile Association (CAA).

2.6. Reality Check – Overnight Tourism, 2002

- Festival organizers, tourism packagers, operators and DMOs can also look to the number of trips Canadians take that include going to a *festival or fair* or an *Aboriginal cultural event* to understand the important contribution Festival Tourism Enthusiasts make to tourism in Canada as a whole. [7]
- According to the Canadian Travel Survey, of the 95.2 million overnight domestic trips taken by Canadians in Canada during 2002[8], approximately 6.2 million included a visit to a *festival, fair or exhibition* and 1.2 million included a visit to an *Aboriginal cultural event.*
- By way of comparison, about 5.3 million overnight person trips by Canadians within Canada included a play, concert or other cultural event and even more, or 7.7 million, included a visit to an historic site, 6.7 million included a visit to a museum or art gallery and 3.7 million included a visit to a zoo, aquarium or botanical garden.

[7] The TAMS study provides information about the number and characteristics of *people* in the market for various festivals and fairs when they travel. A different survey, Statistics Canada's Canadian Travel Survey (CTS), provides a different type of estimate. The CTS measures the number of overnight *trips* Canadians take over a year and on how many of these trips they engage in various activities. The CTS is an annual telephone survey of Canadian adults (15 years of age or over) designed to measure the volume and value of tourism in Canada. The list of activities engaged in on the trip is pre-defined in the Statistics Canada questionnaire. It includes *festivals and fairs*.

[8] Overnight person visits in Canada in calendar year 2002.

2.7. Cross-Border Differences

When packaging and marketing festivals, tourism planners, marketers and DMOs may have to develop a two-tier strategy – one for Canadians and one for Americans. American Festival Tourism Enthusiasts are older and have a more upscale demographic profile than do their Canadian counterparts and than do “typical” visitors from the U.S.A. to Canada. For more details about the American members of this market segment, see the corresponding report on U.S.A.’s Festival Tourism Enthusiasts.

2.8. Impacts of Population Changes

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

- Provinces and regions throughout Canada will grow at different rates, with Ontario and British Columbia experiencing the highest growth rates and Quebec and Atlantic Canada experiencing the lowest. At an estimated 37% increase in the adult population of Ontario by 2026 compared to a 27% increase for the entire country, the pool of Ontarians from which Canada has to draw will increase from 8.9 to 12.2, and the Toronto CMA will increase from about 3.6 million to 6.1 million by 2026.
- Older people – those who are at least 55 years of age – will represent an increasingly sizeable proportion of the Canadian population. They currently account for over one-quarter of the adult population (28%) but will represent over two-fifths by 2026 (42%).
- Canadian residents born outside Canada will increase from about 21% now to 28% by 2026, with much of this increase being absorbed by major urban centres that act as reception centres for new Canadians, and particularly Toronto and Vancouver. By 2026, more than half of adult residents of each of these metropolitan areas will have been born outside Canada.
- There will be an increase in the absolute number of Canadians who will be in the market for festivals and events between 2000 and 2026, from an estimated 2.0 million now to about 2.7 million in 2026. Canada’s likely share of this market – those who will seek festival experiences and take leisure trips within Canada – is also expected to grow from 1.7 million to 2.1 million. At 25%, this growth rate is similar to Canada’s growth rate overall (27%).
- Tourist audiences for *music festivals* within the Festival Tourism Enthusiast market are expected to grow at only 18% between now and 2026. This growth rate is well below the national average of 27%, likely because these events have special appeal to younger Canadians – a demographic segment that will represent a diminishing share of Canadians as the population ages over the next two decades. Similarly, *western theme event* audiences are expected to grow at about 19%, again reflecting the appeal of these events to regions of the country and age segments that are expected to experience lower growth than the Canadian population as a whole over the next two decades.
- In contrast, *theatre festivals*, *literary festivals* and *international film festivals* – activities that tend to attract older consumers and/or those who live in Ontario – are expected to increase in tourism market demand, growing at rates well above the national average (40% growth rate for literary festivals; 39% international film festivals; 33% for theatre festivals). In large part, these growth rates reflect the popularity of these types of festivals among Festival Tourism Enthusiasts in *Ontario* -- the province that is expected to grow at a much higher rate than Canada as a whole.

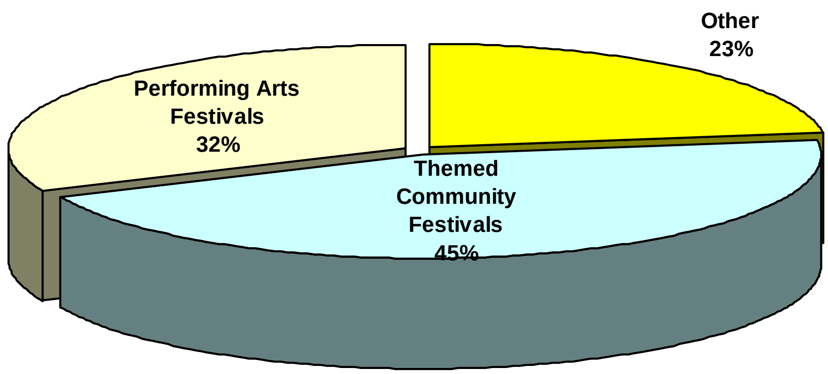
3. An Overview of Market Size

3.1. Total Market Size

In 2000, approximately 1.7 million adult Canadians who took a leisure trip within Canada over a two-year period fell within the Festival Enthusiast market. This market share represents 1-in-14 of Canada's 23.3 million adults (7%).

The segment includes 675,000 tourists who are *Performing Arts Festival Tourism Enthusiasts* and just under one-half million who are *Themed Community Festival Tourism Enthusiasts* (497,000). The remaining 483,000 tourists go to a mix of performing arts and themed community festivals, but do not show a special preference for one type of festival or event over the other (see footnote for definitions of these market segments).[9]

Festival Tourism Enthusiasts
Market Breakdown -- 1.7 Million Canadian Adults



Adults (18+) who have taken overnight leisure trips in Canada in past two years. Source: TAMS, 2000.

At 1.7 million, Festival Tourism Enthusiasts represent one-eighth of the 14.0 million Canadians who took leisure trips in Canada over a two-year period. Since there is some overlap in definitions between the Festival Tourism Enthusiast market and other cultural market segments, direct comparisons are not appropriate between this market segment and the Visual and/or Performing Arts Enthusiast segments.

[9] **High Intensity Festival Enthusiasts**: At least one of the following as an activity on a recent leisure trip: Pow Wows or other Aboriginal celebrations; Music Festivals; Theatre Festivals; AND at least one of the following as an activity on a recent leisure trip: Carnivals; Western Theme Events; International Film Festivals; Literary Festivals; Local festivals or fairs; OR at least three of the following as an activity on a recent leisure trip: Pow Wows or other Aboriginal celebrations; Music Festivals; Theatre Festivals; Carnivals; Western Theme Events; International Film Festivals; Literary Festivals; Local festivals or fairs.

High Intensity *Performing Arts* Festival Enthusiasts: At least two of the following as an activity on a recent leisure trip: Music Festivals, Theatre Festivals, and/or Literary Festivals.

High Intensity *Themed Community* Festival Enthusiasts: At least two of the following as an activity on a recent leisure trip: Pow Wows or other Aboriginal celebrations; Carnivals; Western Theme Events; and/or local festivals or fairs.

See Appendix for definitions of other high intensity activity groups.

Compared to Soft Outdoor Adventure Enthusiasts at 4.4 million Canadians, Museum & Related Cultural Institution Enthusiasts at 2.7 million and Heritage Tourism Enthusiasts at 2.2 million, Festival Tourism Enthusiasts represent something of a *niche* market, similar in size to the Wine/Culinary market [see Table 1].

Table 1: Market Size & Comparisons With Other Segments

	CANADIAN ADULTS	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	TOTAL	FESTIVAL ENTHUSIASTS
Millions of Adults (18+)	*23.3 million*	*14.0 million*	*1.7 million*
Festival Enthusiasts	2.0	1.7	1.7
Performing Arts Festivals	0.8	0.7	0.7
Themed Community	0.6	0.5	0.5
Museums & Related Cultural Institutions	3.2	2.7	0.7
Heritage	2.6	2.2	0.7
Visual Arts	2.1	1.7	0.5
Performing Arts (All)	1.3	1.1	0.7
Wine/Culinary	1.8	1.5	0.4
Soft Outdoor Adventure	5.3	4.4	0.7
Hard Outdoor Adventure	1.6	1.3	0.3

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

3.2. Market Sub-Groups & Activity Participation Rates

About 2-in-5 Canadians in the broadly defined Festival market segment fall within the *Performing Arts Festival* market sub-sector. Of the 1.7 million Canadians in the broader group, 675,000 or 41% have gone to at least two of the following types of festivals while on a recent leisure trip:

Theatre Festivals 457,000

Music Festivals 497,000

Literary Festivals 381,000

The subset that falls within the *Themed Community Festival* tourism market is somewhat smaller than the Performing Arts segment. Of the 1.7 million Canadians in the Festival Tourism Enthusiast market, 497,000 or 3-in-10 went to at least two types of the following festivals or events on a recent leisure trip:

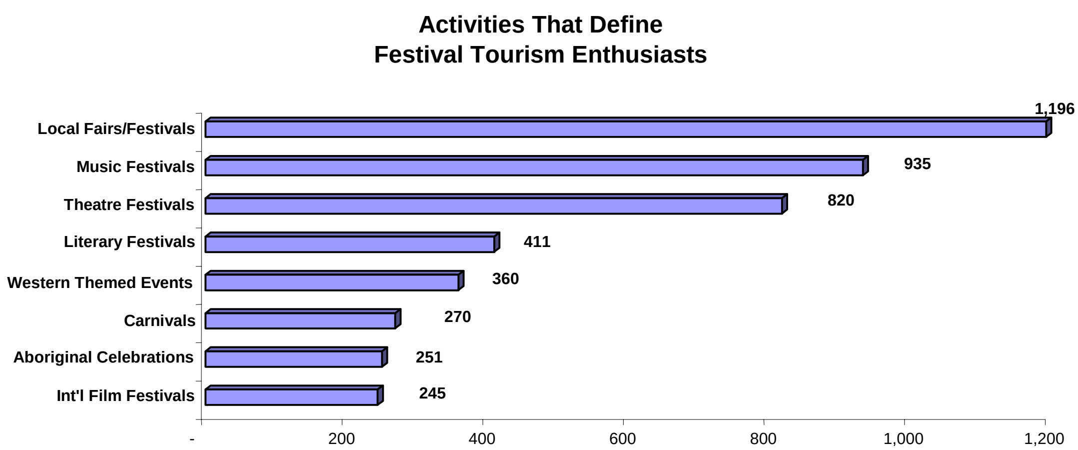
Carnivals 182,000

Local Fairs or Festivals 461,000

Western Theme Events 241,000

Pow Wows or Other Aboriginal Celebrations 214,000

Local festivals and fairs attract the largest following, with 7-in-10 Festival Tourism Enthusiast patrons claiming to have included a visit to one on a recent overnight leisure trip. Close to one million, or more than half of these festival enthusiasts, went to a **music festival** and slightly fewer or about 820,000 went to a **theatre festival** on a recent leisure trip. Festivals that are considerably less popular include **literary festivals** at about 1-in-4, western theme events such as the Calgary Stampede at about 1-in-5 Festival Tourism Enthusiasts.



Numbers in thousands of adult Canadians in enthusiast market segment with recent trips in Canada.
Source: TAMS, 2000.

International film festivals, Pow Wows and other Aboriginal celebrations, and **carnivals** such as Marde Gras or Rio's Carnival are included on trip itineraries by no more than 1-in-7 Canadians in this market segment.

Festival Tourism Enthusiasts with recent Canadian leisure travel experiences share interests with many other high involvement tourism activity segments and particularly those that are culturally oriented.

- About 2-in-5 share interests with **Heritage** Enthusiasts, **Soft Outdoor** Adventurers, **Museum & Related Cultural Institution** Enthusiasts and/or **Performing Arts** Enthusiasts.
- One-third share the interests of **Visual Arts** Enthusiasts.
- About one-fifth are also **Wine/Culinary** Tourism Enthusiasts.

These overlaps suggest opportunities for cross-market packaging and promotion *within* cultural tourism products and *between* festivals and outdoor experiences for the domestic Festival Tourism Enthusiast market.

Table 2: Market Share of Key Segments

	Canadian Adults	Recent Leisure Travellers in Canada	
Millions of Adults (18+)	Total	Total	Festival Enthusiasts
Festivals	9%	12%	100%
Heritage	11%	15%	43%
Soft Outdoor Adventure	23%	31%	41%
Museums & Related Cultural Institutions	14%	19%	41%
Performing Arts	6%	8%	40%
Visual Arts	9%	12%	33%
Wine/Culinary	8%	11%	22%

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

4. Performing Arts Festivals Versus Themed Community Festivals

4.1. Performing Arts Festival Tourism Enthusiasts

In this and the following section, key characteristics and areas of differentiation between the two market subsets – Performing Arts Festival Tourism Enthusiasts and Themed Community Festival Tourism Enthusiasts – are examined. As noted earlier, there are 675,000 Canadians in the Performing Arts Festival Tourism Enthusiast sub-group, representing two-fifths of the total Festival Enthusiast market.

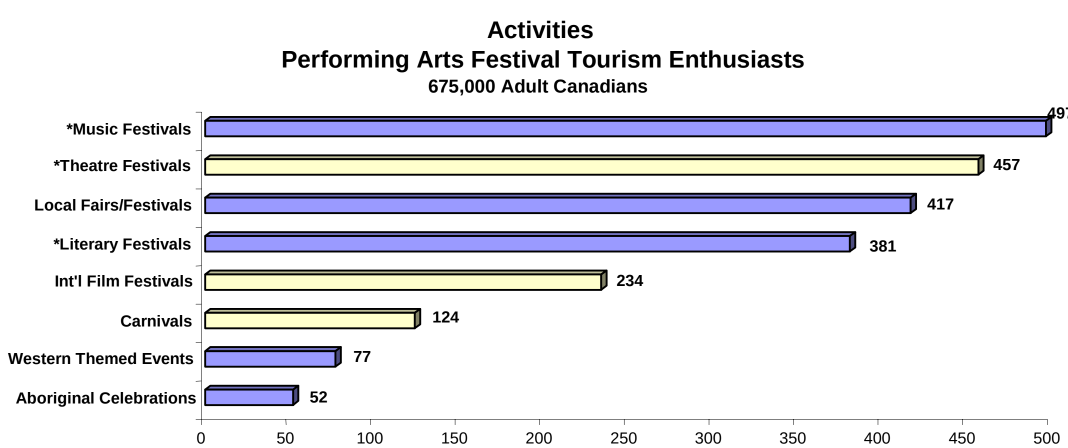
Three-quarters of the travellers within this market segment say that they have gone to a music festival while on recent trips (74%), followed by about two-thirds who say they attended a theatre festival (68%) and over one-half who claim to have attended a literary festival (57%) (percentages are the proportion of the Performing Arts Festival Tourism Enthusiast subset that included each of the listed events on recent trip itineraries).

Music festival 497,000 (74%)

Theatre festival 457,000 (68%)

Literary festival..................... 381,000 (57%)

Local festivals and fairs are also widely popular among these tourists with 3-in-5 including such events on recent trips. About one-third claim to have gone to an international film festival on a recent leisure trip, and close to one-fifth have attended a large-scale carnival such as Mardi Gras. Western themed events such as the Calgary Stampede are not particularly popular among Performing Arts Festival Tourism Enthusiasts, capturing only about ten percent of this market.

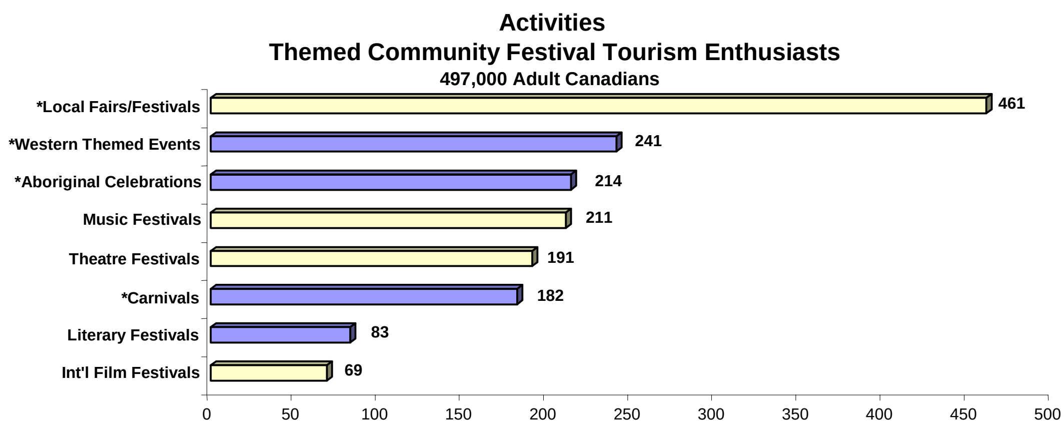


*Activities that define the market segment. Numbers in thousands of adult Canadians in enthusiast market segment with recent trips in Canada. Source: TAMS, 2000.

4.2. Themed Community Festival Tourism Enthusiasts

Of the 1.7 million Canadians in the broadly defined market segment, 497,000 or 30% have gone to at least two types of themed community festivals while on a recent leisure trip.

Local fairs and festivals are especially popular within this group. Over 9-in-10 say they went to such a festival on a recent overnight leisure trip. About half of these tourists also claim to have been to a Western themed event such as a rodeo or the Calgary Stampede, somewhat fewer have been to a Pow Wow or other Aboriginal celebration, and about one-third have been to a carnival such as Mardi Gras. Music and theatre festivals are also relatively widely attended by Themed Community Festival Tourism Enthusiasts, with about 4-in-10 claiming to have gone to such festivals while on recent travels.



*Activities that define the market segment. Numbers in thousands of adult Canadians in enthusiast market segment with recent trips in Canada. Source: TAMS, 2000.

The percentages shown below represent the proportion of Themed Community Festival Tourism Enthusiasts who claim to have gone to each of the listed events on recent trips.

Local festivals and fairs 461,000 (93%)

Aboriginal celebrations......... 214,000 (43%)

Carnivals 182,000 (37%)

Western theme events 241,000 (49%)

5. Market Characteristics: Festival Tourism Enthusiasts

5.1. Where They Live and Where They Travel

Canadians from all parts of the country are represented among Festival Tourism Enthusiasts. They are distributed in much the same way as is Canada's adult population as a whole (see Table 3).

Since many Canadians concentrate their travel *within* the province or region in which they live, it is not surprising that the three most populous provinces achieve the highest share of Canadians in this market segment. Smaller numbers of Canadians live in Atlantic Canada, Alberta and Manitoba/ Saskatchewan and, as a consequence, lower proportions of Festival Tourism Enthusiasts claim to have taken leisure trips to these destinations in the past couple of years: Atlantic Canada (24%), Alberta (23%) and Manitoba/Saskatchewan (16%) than is the case with the more populous provinces (see Table 4).

Table 3: Place of Residence

	Canadian Adults	Recent Leisure Travellers in Canada	
	Total	Total	Festival Enthusiasts
Adults (18+)	*23.3 million*	*14.0 million*	*1.7 million*
Atlantic Canada	8%	8%	7%
Quebec	25%	24%	23%
Montréal CMA	12%	11%	10%
Ontario	38%	35%	39%
Toronto CMA	16%	12%	16%
Manitoba/Saskatchewan	7%	8%	5%
Alberta	9%	11%	10%
British Columbia	13%	15%	16%
Vancouver CMA	7%	7%	8%

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

Some regions can be said to have particularly high "attraction rates" compared to others because they lure high levels of Festival Tourism Enthusiasts relative to their resident populations. Those that are especially successful in attracting these enthusiasts over a two-year period relative to their share of the Canadian adult population include **Atlantic Canada**, **Alberta** and **British Columbia**. Between two and three times as many Festival Tourism Enthusiasts claim to have visited these provinces as their share of the total adult population would suggest.

Ontario is the least successful in attracting domestic festival-oriented tourists relative to its population – this province represents 38% of the country's adults and is visited by 57% of Festival Tourism Enthusiasts, for an "attraction rate" of 1.5. Quebec falls between the high levels evident for Canada's eastern and western regions, representing 25% of the adult population and attracting 41% of Festival Tourism Enthusiasts over a two year period, for a 1.6 "attraction rate".

The U.S.A. is a strong competitor for travel within the Festival Tourism Enthusiast segment. Close to two-fifths of these tourists say they have taken a leisure trips to the United States (38%) and one-quarter have gone to a sun/sea destination over the past couple of years (25%).

Fewer than 1-in-10 Canadian travellers as a whole claim to have taken a European holiday over the past couple of years (9%) but twice this proportion of Festival Tourism Enthusiasts make this claim (19%). The strong lure of Europe and other countries relative to Canadian travellers as a whole is likely a reflection of their strong interest in cultural experiences.

Table 4: Destinations Visited in Past 2 Years

	Canadian Adults	Recent Leisure Travellers in Canada	
	Total	Total	Festival Enthusiasts
Adults 18+	*23.3 million*	*14.0 million*	*1.7 million*
CANADIAN DESTINATIONS	**60%**	**100%**	**100%**
Atlantic Canada	11%	18%	24%
Quebec	21%	36%	41%
Ontario	29%	48%	57%
Manitoba/Saskatchewan	9%	15%	16%
Alberta	14%	24%	23%
British Columbia	18%	30%	34%
Territories	1%	1%	2%
OTHER DESTINATIONS			
Any U.S.A. Destination	29%	36%	38%
Mexico/Caribbean	9%	9%	12%
U.K./Other Europe	8%	9%	19%
Other Countries	6%	6%	9%
Sun/Sea Destinations	20%	23%	25%
Any Locations Outside Canada (NET)	39%	45%	49%

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

5.2. Demographic Characteristics

Festival Tourism Enthusiasts are more likely to be women (55%) than they are to be men (45%). They span the age spectrum with a concentration among younger Canadians. In fact, 2-in-5 are between the ages of 18 and 34 years, with an average age of close to 41 years. Festival Tourism Enthusiasts are, therefore, somewhat younger than the typical domestic tourist in Canada who has an average age of about 43 years.

Table 5: Demographics – Gender & Age

	Recent Leisure Travellers in Canada	
	Total	Festival Enthusiasts
Adults 18+	*14.0 million*	*1.7 million*
Men	48%	45%
Women	52%	55%
18 - 34 years	33%	40%
35 - 44 years	24%	24%
45 - 54 years	19%	16%
55 - 64 years	12%	12%
65+ years	13%	9%
Average Age	43.4 years	40.8 years

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

There are directional indications to suggest that the age/gender mix for some types of festivals and events differs from the segment as a whole. For example:

- Music festival audiences are composed of about equal proportions of men (48%) and women (52%), and are even younger than the Festival Tourism Enthusiast in general, with an average age between 38 and 39 years;
- Theatre festivals are particularly likely to appeal to Canadian women (61%).

Festival Tourism Enthusiasts span the income and education spectrums. They are less likely to fall into the lowest education group and are more likely to be university graduates than are Canadian travellers as a whole. Despite their relatively high levels of education, these enthusiasts do not have especially high household incomes, possibly because they have not reached their full earning potential as a result of their relative youthfulness. Their average household income, at $53,000 (Cnd$) is marginally lower than the average Canadian traveller's at $54,900 (Cnd$).

Table 6: Demographics – Income & Education

	Recent Leisure Travellers in Canada	
	Total	Festival Enthusiasts
Adults 18+	*14.0 million*	*1.7 million*
Household Income (Cnd$)		
Under $40,000	39%	39%
$40,000 - $59,999	26%	28%
$60,000 - $99,999	25%	24%
$100,000 or more	11%	9%
Average	$54,900	$53,000
Education		
Some Secondary or Less	14%	4%
Completed Secondary	26%	25%
Some Post Secondary	39%	43%
Graduated University	21%	27%

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

Most Festival Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Nonetheless, close to 3-in-10 might be in the market for festival experiences that take into account the interests and needs of teenagers or children (27%) and almost 2-in-10 might seek content appropriate for children who are twelve years of age or under (19%).

The proportion of these enthusiasts who were born outside Canada (17%) is very similar to the general domestic travelling public (15%). Approximately half of those born outside the country came to Canada from the United Kingdom or other European countries.[10]

Table 7: Demographics – Household Composition

	Recent Leisure Travellers in Canada	
	Total	Festival Enthusiasts
Adults 18+	*14.0 million*	*1.7 million*
Adult Only	65%	73%
Any Teens/Children	35%	27%
Any Children under 12	26%	19%

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

Table 8: Demographics – Place of Birth

	Recent Leisure Travellers in Canada	
	Total	Festival Enthusiasts
Adults 18+	*14.0 million*	*1.7 million*
Born In Canada	85%	83%
Born Outside Canada	15%	17%

Source: Special TAMS Tabulations, pages 7; 32.

[10] See Detailed Tables, TAMS Canada, page 32 for place of birth of the Canadian adult population as of 2000.

5.3. Other Travel Activities

5.3.1. Other Cultural Activities

Festival Tourism Enthusiasts not only go to festivals and events . . . they also go to local arts and crafts studios, farmers' fairs or markets, museums, art galleries and related cultural institutions such as zoos when on their travels. These experiences are sought by at least 1-in-2 Canadian adults in this tourism market segment.

Other activities sought on trips by about 2-in-5 members of this market sector include botanical gardens, science or technology museums and aquariums. About 1-in-3 also seek harvesting or "pick-your-own" farm experiences, or go to historic sites or replicas of cities or towns when on trips, and somewhat fewer go to planetariums or attend French Canadian cultural activities on their travels.

Participation rates in individual activities associated with **heritage, museums and related cultural institutions** and **visual arts** by Festival Tourism Enthusiasts are appreciably *higher* than those evident for Canadian travellers as a whole.

Table 9: Heritage/Museums and Related Cultural Institutions/Visual Arts Activities

	FESTIVAL ENTHUSIASTS
Adults 18+	*1.7 million*
Local arts & crafts studios	64%
Farmers' fairs or markets	57%
History/heritage museums	52%
Art galleries	52%
Zoos	51%
Botanical gardens	40%
Science/technology museums	39%
Aquariums	38%
Pick your own farms / harvesting	32%
Historic sites	30%
Historical replicas of cities/towns	29%
Planetariums	25%
French Canadian cultural experiences	24%
Aboriginal cultural experiences in remote or rural setting	18%

Source: Special TAMS Tabulations, pages 10-1/4

Table 10: Performing Arts / Wine & Culinary Activities

	FESTIVAL ENTHUSIASTS
Adults 18+	*1.7 million*
PERFORMING ARTS	
Theatre	60%
Popular/rock & roll music concerts	43%
Classical music concerts	32%
Jazz music concerts	26%
Ballet or other dance	23%
Opera	19%
Musical attractions (e.g., Jazzland)	9%
WINE/CULINARY	
Internationally acclaimed restaurants	37%
Winery touring	27%

Source: Special TAMS Tabulations, pages 10-1/2

Similarly, there is an appreciably higher level of participation in many performing arts and wine/culinary activities among tourists in the festival segment than is evident for Canadian travellers as a whole. For example, going to live theatre performances while on trips is popular among 6-in-10 members of the festival segment (60%) but only about half this proportion of typical Canadian travellers in total (27%).

Perhaps because of their relative youth and their interest in *music festivals*, 2-in-5 festival enthusiasts also go to popular or rock and roll concerts while travelling. At 43%, this level of interest in popular concerts is about twice as high as that evident among Canadian travellers in total (20%).

Approximately 1-in-3 Festival Tourism Enthusiasts seek out classical music concerts and approximately 1-in-4 go to jazz concerts or ballet performances and 1-in-5 attend opera performances while on their trips. These activities are sought by members of this tourism sector at about three times the proportion that would be found among Canadian tourists as a whole.

Over one-third of Festival Tourism Enthusiasts are in the market for dining at internationally acclaimed restaurants when they travel and about one-quarter spend some of their time on trips touring wineries. These rates of participation in wine and culinary activities are noticeably higher than those evident for Canadian travellers as a whole, suggesting that festivals might benefit from co-packaging with these experiences to lure the festival crowd.

5.3.2. Outdoor Activities

Table 11: Outdoor Activities Used To Define Soft Outdoor Adventure Market Segment

	FESTIVAL ENTHUSIASTS
	1.7 million
Hiking/backpacking in wilderness settings	45%
Kayaking or canoeing	35%
Cycling	33%
Motor boating	29%
Downhill skiing	21%
Cross-county skiing	20%
Horseback riding	17%
Sailing	16%
Snowmobiling	11%
Snowboarding	6%
Motorcycling	5%
Wind surfing	4%
Hot air ballooning	3%

Source: Special TAMS Tabulations, page 9.

Of the activities used to define the *Soft Outdoor Adventure Enthusiast* market, hiking and backpacking in wilderness settings is the most popular among Festival Tourism Enthusiasts (45%). About 3-in-10 of these tourists also claim to go kayaking or canoeing, cycling, and/or motor boating while on trips, and approximately one-fifth go downhill and/or cross country skiing.

"Gentler" encounters with the outdoors – activities such as such as wildlife (51%) and wildflower viewing (43%) – also attract about half of these tourists. Golfing and/or fishing attract about one-third of them, while slightly fewer claim to have been bird watching or whale watching while on their travels over the past couple of years.

Table 12: Other Outdoor Activities

	FESTIVAL ENTHUSIASTS
Adults 18+	*1.7 million*
Wildlife viewing	51%
Wildflowers / flora viewing	43%
Golfing	35%
Fishing	33%
Bird watching	26%
Whale watching	24%
Seeing northern lights/ other artic experiences	16%

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

5.3.3. Activities At Home

Not only do many Festival Tourism Enthusiasts go to festivals, concerts and theatre performances when *on trips*, but at least 7-in-10 of them go to these performances on a frequent or occasional basis in their *home* communities. They go to these performances and go to museums, art galleries, zoos/botanical gardens and, to a lesser extent, to ballet and opera performances at *home* at appreciably higher rates than does the "typical" Canadian traveller.

These findings suggest that *local* cultural performances and institutions may prove to be very **useful communication routes** for reaching potential festival-oriented tourists with messages about culture-oriented travel opportunities within Canada.

Table 13: Frequent/Occasional Activities At Home

	Recent Leisure Travellers in Canada	
	Total	Festival Enthusiasts
Adults 18+	*14.0 million*	*1.7 million*
Live theatre	43%	70%
Music concerts	47%	69%
Museum	39%	57%
Art gallery/art show	32%	56%
Zoo/botanical garden	38%	53%
Ballet	9%	18%
Casino	15%	17%
Opera	9%	14%

Source: Special TAMS Tabulations, pages 20; 38.

5.4. Ratings of Canada

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

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

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

They also rate Canada favourably for having a lot for *young people to see and do,* for being *safe,* for offering many *cultural events and attractions*, having *friendly people*, as a place to experience *adventure and excitement*, for being *clean and well cared for*, and, among those who offer an opinion, as a good *hunting* destination.

Less favourable ratings are accorded attributes associated with to experience different cultures and ways of life including Aboriginal culture, historic sites, having interesting shops, as a city destination and one that respects the natural environment. Canadians in the Festival Tourism Enthusiast segment are least positive about their country as a place for romance, for offering value for money and as a destination with a popular or trendy image.

Tourists in this market segment have almost identical opinions of Canada as those expressed by Canadian travellers as a whole.

Table 14: Attitudes Toward Canada

	Recent Leisure Travellers in Canada		
	Total	Festival Enthusiasts	
Adults 18+	*14.0 million*	*1.7 million*	
	Average (#)	Average (#)	Can't Rate (%)
Beautiful scenery	9.1	9.2	1%
One of best destinations for outdoor activities	8.7	8.9	3%
Lots for families	8.6	8.7	4%
Great place to relax	8.6	8.7	3%
Lots for mature adults	8.5	8.5	7%
Great place for fishing	8.5	8.5	19%
One of best summer destinations	8.4	8.5	3%
Safe for visitors	8.3	8.3	3%
Lots for young adults	8.1	8.3	8%
Many cultural events & attractions	8.0	8.3	4%
Place with friendly people	8.2	8.3	3%
Great place to experience adventure & excitement	8.1	8.3	6%
Clean/well cared for	8.3	8.2	2%
Great place for hunting	8.3	8.1	36%
Great place for Aboriginal culture	7.5	7.9	9%
Great place to see historic sites	8.0	7.9	3%
Place with interesting shops	7.8	7.9	8%
Great place to experience different cultures	7.7	7.9	5%
Great place to experience city life	7.7	7.9	7%
Respects natural environment	7.7	7.8	5%
One of best winter destinations	7.5	7.6	6%
Great place to experience "good life"	7.4	7.6	9%
Place for romance	7.4	7.5	14%
Offers excellent value for money	7.1	7.2	6%
Popular, trendy place	6.8	6.9	13%

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

5.5. Ways to Reach the Market

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

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

Canadians in this market segment are avid daily local newspaper readers (87%). Furthermore, almost half of them claim to read the travel section of weekday editions of daily newspapers on a regular basis and more than half claim to read or look through the travel section of the weekend editions of a local newspaper.

They are also avid magazine readers (92%). News magazines, hobby, travel and fashion magazines, followed closely by travel magazines and Canadian or National Geographic, capture the most widespread regular readership. Compared to the *average* Canadian tourist, those in the festival market are particularly likely to read the following publications:

- Travel magazines and Canadian Geographic;
- News magazines.

Table 15: Print Media Read Regularly

	FESTIVAL ENTHUSIASTS
Adults 18+	*1.7 million*
DAILY NEWSPAPER (ANY)	**87%**
Weekday edition	77%
Travel section of weekday edition	48%
Weekend edition	80%
Travel section of weekend edition	55%
Community newspapers	78%
ANY MAGAZINES	**92%**
News magazines	58%
Hobby magazines	45%
Travel magazines	43%
Fashion/homemaking magazines	42%
Canadian or National Geographic	40%
General interest/city life magazines	30%
Sports magazines	25%

Source: Special TAMS Tabulations, page 15.

Table 16: Television Programs Viewed Regularly

	FESTIVAL ENTHUSIASTS
Adults 18+	*1.7 million*
Movies	74%
Nature shows	65%
Early evening news	64%
Evening sitcoms	63%
Evening drama	59%
News magazine shows	57%
Instructional/hobby shows	55%
Late evening news	50%
Professional sports	50%
Morning news	32%
Daytime programs on weekdays	20%

Source: Special TAMS Tabulations, page 17.

Daily and weekend newspapers may have better reach among these enthusiasts than does any particular type of *television programming*. Almost three-quarters of these festival tourists say they watch televised movies on a regular basis and approximately two-thirds claim to watch nature shows, the early evening news, and/or evening sitcoms. About three-fifths say they view evening dramas and/or news magazine shows regularly. These viewing habits are virtually identical to those claimed by Canadian travellers as a whole.

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

Table 17: Club/Organization Memberships

	FESTIVAL ENTHUSIASTS
Adults 18+	*1.7 million*
Auto club	41%
Sports club	31%
Nature organization	14%
Art gallery/museum	9%
Zoo/botanical garden	4%
Gardening club	3%

Source: Special TAMS Tabulations, page 18.

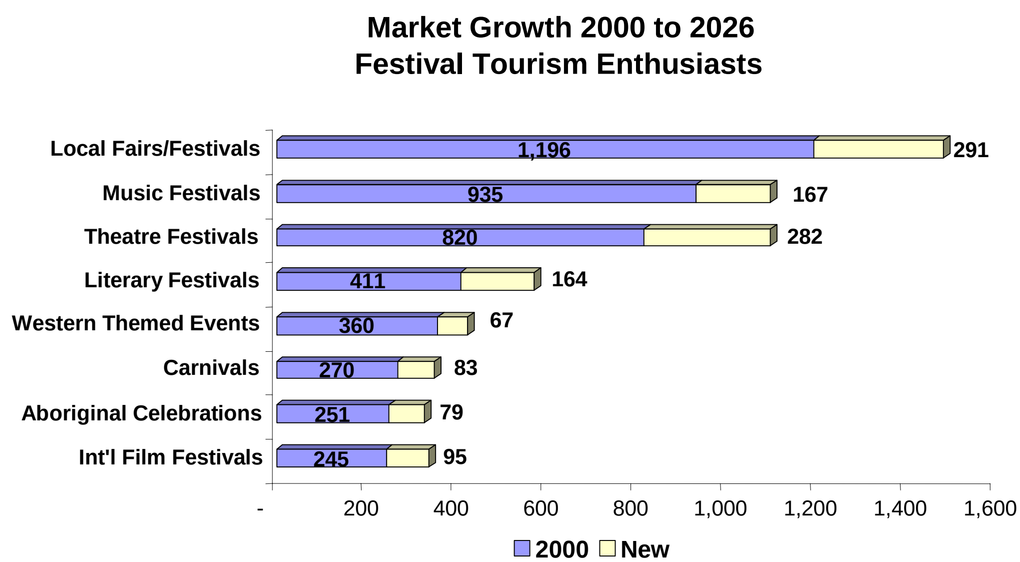
6. Projections to 2026

In 2000, there were approximately 23.3 million Canadians 18 years of age or older. Statistics Canada projects that this number will increase to 29.6 million by the year 2026, for an increase of 27%.[11] The domestic Festival Tourism Enthusiast market is also expected to increase over time, from 1.7 million to 2.1 million by 2026. At a rate of 25%, this growth is very close to the national average. Each of the subsets within this tourism market are expected to increase in size over the next two decades, although the Performing Arts Festival group will grow at 33% -- a rate that is higher than the national average. The Themed Community Festival group will grow at about the same rate as the adult population as a whole (26%).

Performing Arts Festival Tourism Enthusiasts .... From 675,000 to 899,000

Themed Community Festival Tourism Enthusiasts .... From 497,000 to 625,000

Not all audiences in the market segment will grow at the same rate. Because there is expected to be a considerable increase in the proportion of Canadians who are older and a corresponding decrease in the share of the travelling public that is younger, festivals with a particular appeal to one or another age segment may be influenced differently.



*Activities that define the market segment. Numbers in thousands of adult Canadians in enthusiast market segment with trips in Canada. Source: TAMS, 2000.

For example, literary and international film festival tourist audiences are expected to increase by about 40% over the next two decades – a rate of increase far above the national growth rate (27%). In contrast, the domestic market for music festivals which tend to attract younger tourists, is expected to grow at only 18% over twenty-five years or well below the 27% national growth rate.

A discussion of more general changes anticipated for the Canadian tourism market is provided in the appendix to this report.

[11] See Footnote #4.

7. Appendix

7.1. About TAMS

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 that 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 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. Ontario’s Ministry of Tourism and Recreation (MTR) supplied figures for each sampling unit used in TAMS for aging the Canadian population and the USA. 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 Museums/Related Cultural Institutions - At least two of the following as an activity on a recent leisure trip: Art Galleries; Children’s Museums; General History/Heritage Museums; Science/Technology Museums; Aboriginal-Themed Museums AND at least one of the following: Botanical Gardens; Planetariums; Zoos; Aquariums.

High Intensity Museums - High Intensity Museum & Related Cultural Institution Enthusiasts with at least two of the following as an activity on a recent leisure trip: Art Galleries; Children’s Museums; General History/Heritage Museums; Science/Technology Museums; Aboriginal-Themed Museums.

High Intensity Museum Related Cultural Institutions - High Intensity Museum & Related Cultural Institution Enthusiasts with at least two of the following: Botanical Gardens; Planetariums; Zoos; Aquariums.

High Intensity Festival Enthusiasts: At least one of the following as an activity on a recent leisure trip: Pow Wows or other Aboriginal celebrations; Music Festivals; Theatre Festivals; AND at least one of the following as an activity on a recent leisure trip: Carnivals; Western Theme Events; International Film Festivals; Literary Festivals; Local festivals or fairs; OR at least three of the following as an activity on a recent leisure trip: Pow Wows or other Aboriginal celebrations; Music Festivals; Theatre Festivals; Carnivals; Western Theme Events; International Film Festivals; Literary Festivals; Local festivals or fairs.

High Intensity *Performing Arts* Festival Enthusiasts: At least two of the following as an activity on a recent leisure trip: Music Festivals; Theatre Festivals; International Film Festivals; and/or Literary Festivals.

High Intensity *Themed Community* Festival Enthusiasts: At least two of the following as an activity on a recent leisure trip: Pow Wows or other Aboriginal celebrations; Carnivals; Western Theme Events; and/or local festivals or fairs.

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-themed museums; French Canadian cultural experiences; carnivals such as Caribbana; western theme events; farmers' fairs or markets; local festivals or fairs; children's museums; general history museums; science or technology museums; historical replicas of cities/towns; historic sites; pick your own farms / harvesting.

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

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

7.2. Unweighted Base Sizes

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

	UNWEIGHTED RECORDS – MAILBACK
Adult Leisure Travellers in Canada in the Past 2 Years	4,272
Festival Enthusiasts	498
Arts Festival Enthusiasts	184
Themed Community Festival Enthusiasts	178
Museums/Related Cultural Institutions Enthusiasts	858
Museum Tourism Enthusiasts	831
Museum Related Cultural Institution Tourism Enthusiasts	505
Soft Outdoor Adventure Enthusiasts	1,241
Hard Outdoor Adventure Enthusiasts	361
Wine/Culinary Enthusiasts	454
Heritage Enthusiasts	762
Performing Arts Enthusiasts	331
Visual Arts Enthusiasts	608
Winter Outdoors (excluding alpine skiing)	844
Alpine Skiing	651

Source: Special TAMS Canada Tabulations, page 1. Note: segments are based on past two year leisure travel to a Canadian destination and participation in a pre-defined set of activities while on trips taken to any destination in the past two years. The activity list for each segment is provided in the "About TAMS" section of this report.

7.3. Attraction Rates

Attraction Rates

Atlantic	3.0
Quebec	1.6
Ontario	1.5
Manitoba/Saskatchewan	2.3
Alberta	2.6
B.C.	2.6

Source: Special TAMS Canada Tabulations, page 1. Attraction rates are the ratio of total regional adult population and the proportion of Canadian adults in the market segment who claim to have gone to a destination within the region on an overnight leisure trip in the past couple of years

7.4. Market Growth: An Aid to the Reader

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

Sample Table

Canada's Adult Population – Age & Gender

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

Source: Special TAMS Canada Tabulations, Table 1.

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

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

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

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

7.4.1. Regional Changes in the Canadian Market

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

Table A-1: Regional Shifts in Canadian Adult Population

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

Source: Special TAMS Canada Tabulations, Table 5.

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

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

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

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

As Canada becomes increasingly urbanized, it may become a growing challenge to lure city residents to heritage events and sites outside of cities, including Aboriginal heritage and cultural experiences. The growth of Canada's cities will also be fed by *new Canadians* at a much higher rate than will growth in other community sizes. Because new Canadians are less likely to travel within Canada than are their Canadian-born counterparts, additional challenges may be encountered in attracting immigrants to art galleries, craft studios and related tourism activities within their new country.[12]

7.4.2. Demographic Changes in the Canadian Market

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

Gender & Age

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

- The 18 to 34 year old age group will decline from 1-in-3 to 1-in-4 adult Canadians by 2026;
- Canadians in their "family" years (35 – 44) will fall from over 1-in-5 members of the adult population to about 1-in-6;
- Middle-aged Canadians (45 – 54) will come close to holding steady as a proportion of the total population, from 18% in 2000 to 16% in 2026;
- Starting at about age 55, the pattern shifts with older people representing *higher* proportions of Canada's adult population in 2026 than they do now. The increase is most prominent among Canadians 65 years of age or older. This older group currently represents about one-sixth of the adult population but by 2026 it is expected to represent over one-quarter.

Table A-2: Canadian Adult Population – Age & Gender

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

Source: Special TAMS Canada Tabulations, Table 1.

[12] Of all Canadian adults in 2000 who were born in Canada, 65% claim to have taken a leisure trip within Canada in the past two years or so. The equivalent proportion for Canadians born outside Canada is 43%. For more details, see Detailed Tabulations, pages 40, 41.

- In absolute numbers, the young adult population (18 – 34 years) will shift from 7,252,000 to 7,286,000 between 2000 and 2026. This young cohort is growing at a rate that is 98% lower than would have been expected if the structure of the population had remained constant between 2000 and 2026. Thus, the impact of changes in the population mix in Canada will reduce the growth rate of the younger age segment substantively. A similar finding is evident for other younger and middle-aged cohorts. In the case of the "family market", not only is the growth rate much lower than would be expected based on today's population structure, but there will be a decrease in the absolute numbers of Canadians in the 35 to 44 year age bracket – from 5,313,000 in 2000 to 4,960,000 in 2026.

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

Household Income & Education

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

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

Table A-3: Canadian Adult Population – Household Income & Education

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

Source: Special TAMS Canada Tabulations, Table 3. Re-percentaged on total stating income. Incomes are expressed in 2000 dollars.

Household Composition

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

Table A-4: Canadian Adult Population – Household Composition

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

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

Place of Birth

Assuming present immigration policies, the proportion of Canadian adults who will have come to Canada from other countries will reach 28% in 2026 from the current 21%. As noted earlier, Canada's major cities will be the reception centres for many of the country's new residents. By 2026, over half of Toronto's population will be new immigrants (54%). The same scenario will be in place for Vancouver (53%). An appreciably lower proportion of the Montréal population will be new Canadians by 2026 (28%) but this proportion is noticeably higher than the current level (20%) in this city.

Table A-5: Canadian Adult Population – Place of Birth

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

Source: Special TAMS Canada Special Tabulations.

7.4.3. Destination Choices

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

Table A-6: Canadian Adult Population – Destinations Visited on Leisure Trips in Past Couple of Years

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

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

7.5. 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