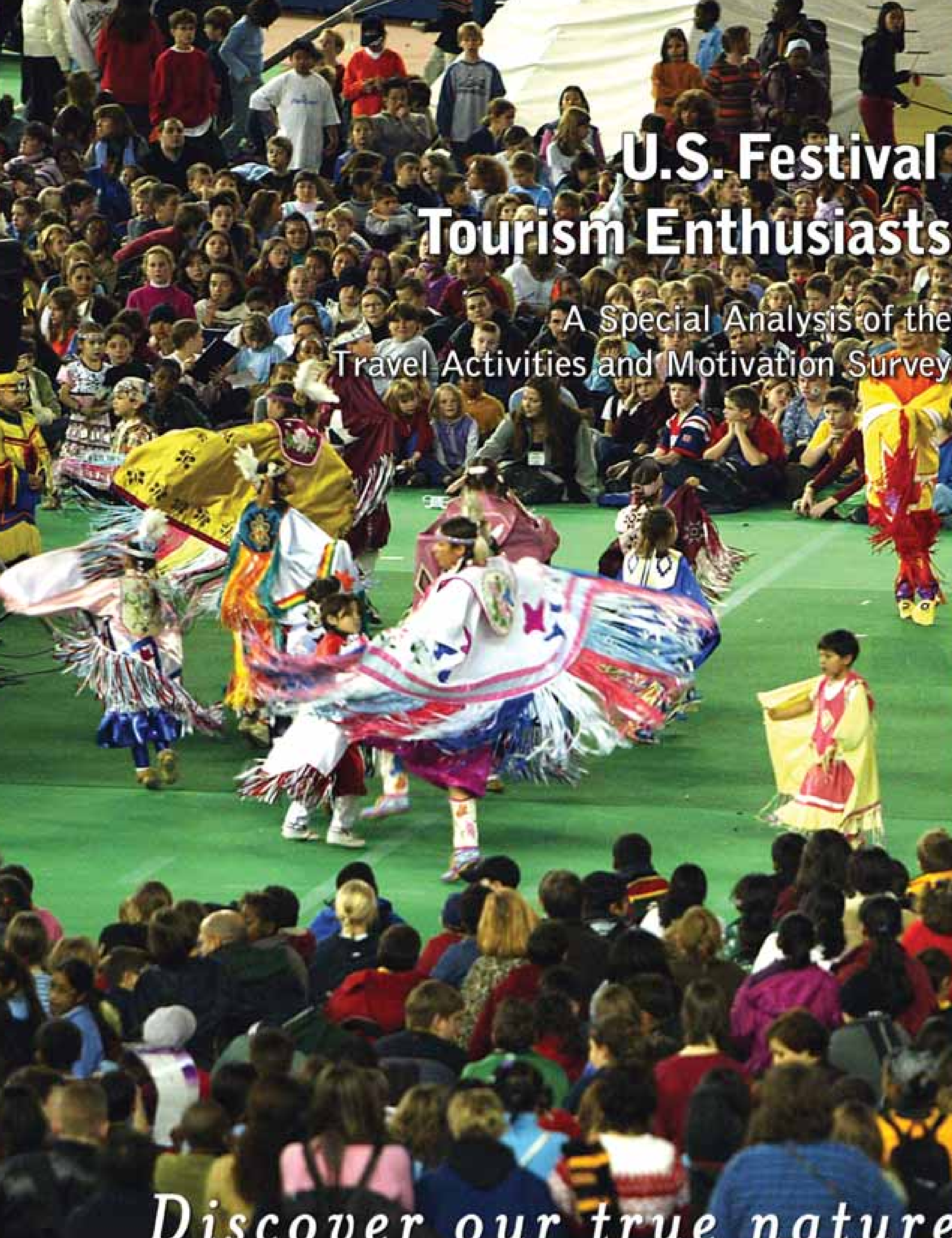
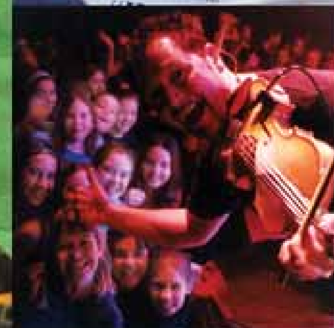


# U.S. Festival Tourism Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey

TAMS

*Discover our true nature*

Canadian Tourism Commission

Commission canadienne du tourisme

Canada

# U.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): | A demonstration during the *Canadian Aboriginal Festival* (Toronto, Ontario) |
| Photo (Top): | *Foyer of Françoys-Bernier Concert Hall, Festival international du Domaine Forget* (at the Domaine Forget located at Saint-Irénée, Charlevoix region, Québec) |
| Credit: | M. Yves Tessier |
| Photo (Middle): | The *Lunenburg Folk Harbour Festival* (Lunenburg, Nova Scotia) |
| Credit: | Nova Scotia Tourism and Culture |
| Photo (Bottom): | The winter *Festival du Voyageur* (St-Boniface,Winnipeg, Manitoba ) |
| Credit: | Festival du Voyageur Inc. |

**Library and Archives Canada Cataloguing in Publication**

Main entry under title :

U.S. festival tourism enthusiasts

Issued also in French under title: Touristes américains adeptes des festivals.
“A Special Analysis of the Travel Activities and Motivation Survey (TAMS)”
ISBN 0-662-38090-8
Cat. no. C86-196/2004E

1. Americans – Travel.
2. Festivals – Economic aspects – Canada.
3. Tourism – Canada.
I. Research Resolutions & Consulting Ltd.
II. Canadian Tourism Commission.

G155.U5U54 2004 338.4’791 C2004-980287-9

If you require additional copies, please visit our website at www.canadatourism.com or e-mail your order to the CTC Distribution Centre at: distribution@ctc-cct.ca. Please quote #C50401E when ordering by e-mail.

# Table of Contents

# 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 U.S.A. Festival Tourism Enthusiasts - Americans who exhibit a particular interest in festivals when they travel and who have exhibited a willingness to travel to Canada on a recent overnight trip.[3] As such, they have taken leisure trips to 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 to 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 coming from the U.S.A. to 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 the U.S.A. obtained from U.S. Census Bureau, TAMS data were "aged" twenty-five years into the future.[5]

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 – Americans travelling to Canada. The final chapter of this report is devoted to the impacts of population changes on the American 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. Because base sizes of respondents in each of these sub-groups are relatively small, only limited interpretation of differences between them is possible.

[5] The Canadian population 18 years of age or older was projected to the year 2026 and the corresponding U.S.A. 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 U.S.A.. These projections included MTR's adjustments for increased educational achievement and immigration flows for Canada.

# 2. Executive Summary

## 2.1. Market Size

- In 2000, approximately 3.9 million adult Americans who took a leisure trip within Canada over a two year period fell within the Festival Enthusiast market. This market share represents 1-in-50 of the U.S.A.'s 200.4 million adults (2%).
- Festival organizers, tourism packagers, and DMOs might develop marketing and packaging strategies around the overlap between American tourists who go to **performing arts festivals** and those who go to **themed community festivals**. The segment includes 1.4 million tourists who are *Performing Arts Festival Tourism Enthusiasts* and 1.7 million who are *Themed Community Festival Tourism Enthusiasts*. *Performing Arts Festival Tourism Enthusiasts* go to musical, theatre and/or literary festivals or events when travelling while those in the *Themed Community Festival* subset go to carnivals such as Mardi Gras, local festivals and fairs, western theme events and rodeos or Pow Wows or other Aboriginal celebrations.
- Americans from all parts of the country are represented among Festival Tourism Enthusiasts. They are distributed in much the same way as is the market that comes to Canada from the U.S.A. as a whole. For the tourist market at large and for Festival Tourism Enthusiasts, Americans who live in states closest to the Canada/U.S.A. border tend to be over-represented and those who live furthest from the border – Tier III states – tend to be under-represented.
- Ontario is the most popular Canadian destination among U.S.A. Festival Tourism Enthusiasts, attracting over 3-in-5. The strong showing for this province is undoubtedly related to the fact that the province is located immediately adjacent to the heavily populated Great Lakes Basin, including states such as New York, Michigan, Pennsylvania, Ohio and Illinois. Quebec and British Columbia each attracts about one-third of the festival market while provinces in the Atlantic region attract about one-tenth.
- Canada faces stiff competition among Festival Tourism Enthusiasts. Practically all of these tourists have taken overnight leisure trips within their own country (95%), 3-in-10 have taken recent leisure trips to Mexico or the Caribbean and to Europe (27%) while 1-in-5 claim to have travelled to other countries recently. The propensity of this segment to seek destinations in Europe or other countries is more pronounced than is the case within the market as a whole, suggesting that Canada's festivals may have to compete with destinations in Europe and other countries to attract these enthusiasts.

## 2.2. Demographic Characteristics

- Festival Tourism Enthusiasts are as likely to be women (51%) as they are to be men (49%).
- They span the age spectrum, closely paralleling the "typical" American leisure tourist in Canada. Thus, about 1-in-4 are between 18 and 34 years, a further 1-in-5 are between 35 and 44 years, and close to 1-in-4 are between 45 and 54 years of age. On average, Festival Tourism Enthusiasts are about the same age as the typical American tourist in Canada – between 46 and 47 year of age.
- Most Festival Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Nonetheless, 1-in-4 might be in the market for festival experiences that take into account the interests and needs of teenagers or children (26%) 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 groups and are more likely have at least some post-secondary education than are American travellers to Canada as a whole.

## 2.3. Cultural Activities

- **Local festivals and fairs** attract the largest following, with over 8-in-10 Festival Tourism Enthusiast patrons claiming to have included a visit to one on a recent overnight leisure trip. Over two million, or more than half of these festival enthusiasts, went to a **music festival** and slightly fewer or about 1.9 million went to a **theatre festival** on a recent leisure trip.
- Festivals that are considerably less popular include **carnivals** such as Mardi Gras at about 1.1 million, **western theme events** such as a rodeo and Pow Wows or other **Aboriginal celebrations** at just under one million (each). **Literary festivals** or events attract about 1-in-5 Festival Tourism Enthusiasts.
- Because Festival Tourism Enthusiasts also go to other types of attractions when they travel, those who are packaging tourism products for this market might consider adding local arts and crafts studios and/or history or heritage museums to the package. Approximately 3-in-4 members of this U.S.A. market segment go to these types of events on their leisure trips. Two-in-three claim to visit zoos, farmers' fairs or markets, aquariums and art galleries on their travels.
- Other activities sought on trips by about 1-in-2 members of this market sector include science or technology museums, botanical gardens, historic sites and historical replicas of cities or towns. About 1-in-3 also go to planetariums while somewhat fewer seek out "pick-your-own" farm experiences, French Canadian cultural activities or Aboriginal cultural experiences in rural settings on their travels.
- 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 American travellers to Canada as a whole. For example, going to live theatre performances while on trips is popular among 7-in-10 members of the festival segment (69%) but only about half this proportion of typical American travellers to Canada in total (39%).
- Perhaps because of their interest in *music festivals,* more than 2-in-5 festival enthusiasts also go to popular or rock and roll concerts or jazz concerts while travelling. These levels of interest in concerts are twice as high as those evident among American travellers to Canada in total. Additionally, approximately 1-in-3 Festival Tourism Enthusiasts seek out classical music 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 two to three times the rate that would be found among American tourists in Canada as a whole.
- Three-fifths of Festival Tourism Enthusiasts are in the market for dining at internationally acclaimed restaurants when they travel and almost one-half 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 American travellers as a whole, suggesting that festivals might benefit from co-packaging with these experiences to lure the festival crowd.

## 2.4. Overlap With Other Activity-Based Segments

- 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. Almost 3-in-4 share interests with **Heritage** Enthusiasts; two-thirds are also **Museum & Related Cultural Institution** Enthusiasts; and over 1-in-2 are also **Performing Arts** and/or **Visual Arts** Enthusiasts. Two-fifths share the interests of **Wine/Culinary** and/or **Soft Outdoor Adventure Enthusiasts**.
- These overlaps suggest opportunities for cross-market packaging and promotion *within* cultural tourism products and *between* festivals and outdoor experiences for the American Festival Tourism Enthusiast market.

## 2.5. Image Challenges & Media Sources

- Canada is most highly rated by American Festival Tourism Enthusiasts for attributes that support an *outdoors* rather than a *cultural* or *urban* image:
  - A place with beautiful scenery;
  - A place that is clean and well-cared for;
  - A great place for fishing;
  - A place with lots of things for mature adults to see and do; and
  - A great place to relax and get away from it all.
- They also rate Canada favourably for having a lot for *families to see and do,* for having *friendly people*, for being *safe*, and, among those who offer an opinion, as a good *hunting* destination. Positive ratings are also offered for having a lot for *young adults to see and do,* being a place to experience *adventure and excitement* and/or *city life*, as a destination for *outdoor activities, cultural events and attractions,* and as a place to visit in the *summer.*
- Less favourable ratings are accorded attributes associated with experiencing *different cultures and ways of life* including *Aboriginal culture, historic sites,* and having *interesting shops.* Americans in the Festival Tourism Enthusiast segment are least positive about Canada as a place for to experience *the good life*, as a *popular or trendy* destination and as one that is attractive in the *winter*.
- Tourists in this market segment have almost identical opinions of Canada as those expressed by American travellers to Canada as a whole.
- The fact that Canada does not resonate as a *cultural* destination is cause for some concern if efforts to encourage Americans in this market segment to travel *to 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 American Automobile Association (AAA).

## 2.6. 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. Canadian Festival Tourism Enthusiasts are younger and have a less upscale demographic profile than do their American counterparts. For more details about the Canadian members of this market segment, see the corresponding report on Canada’s Festival Tourism Enthusiasts.

## 2.7. Impacts of Population Changes

- Fundamental changes in the U.S.A.’s population structure might be taken into account in tourism planning and product development for Festival Tourism Enthusiasts over the next two decades.
- As the primary market for inbound tourism from the United States, border and mid-tier state populations will grow at an appreciably *lower* rate than will the population of the U.S.A. as a whole, and particularly the southern tier of the U.S.A. At an estimated 18% increase in the adult population of states that are on the Canada/ U.S.A. border by 2025 compared to a 27% increase for the entire country, the pool of Americans from which Canada has to draw from for the all-important “border” market will increase at a lower rate than will more distant parts of the U.S.A. By 2025, the border state population is estimated to reach 42.3 million adults from its current level of 35.9 million.

- Older people – those who are at least 55 years of age – will represent an increasingly sizeable proportion of the American population. They currently account for over one-quarter of the adult population (27%) but will represent over one-third by 2025 (37%).
- As the population ages, the proportion of American adults living in households with children will decline. At this time, 1-in-3 adults live in households with teenagers or children (34%), but this proportion will diminish to less than 3-in-10 by 2025 (29%).
- The U.S.A. Festival Tourism Enthusiast market is also expected to increase over time, from 3.9 million to 5.0 million by 2025. At a rate of 26%, this growth is on par with the national average. Each of the subsets within this tourism segment is expected to increase in size over the next two decades, with Themed Community Festival enthusiasts growing at a higher rate than the Festival Tourism Enthusiast market as a whole.
- Performing Arts Festival Tourism Enthusiasts are expected to increase from 1.4 million now to 1.8 million and Themed Community Festival Tourism Enthusiasts from the U.S.A. are expected to grow from 1.7 million to 2.7 million by 2025.

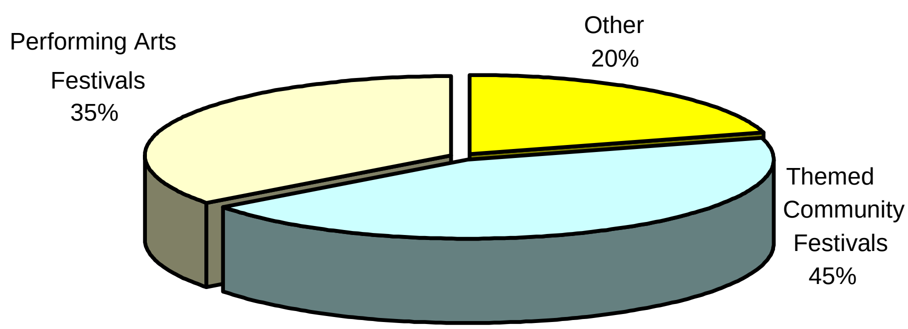
# 3. An Overview of Market Size

## 3.1. Total Market Size

In 2000, approximately 3.9 million adult Americans who took a leisure trip within Canada over a two year period fell within the Festival Enthusiast market. This market share represents 1-in-50 of the U.S.A.'s 200.4 million adults (2%).

The segment includes 1.4 million tourists who are *Performing Arts Festival Tourism Enthusiasts* and 1.7 million who are *Themed Community Festival Tourism Enthusiasts*. The remaining 800,000 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).[6]

**Festival Tourism Enthusiasts**
**Market Breakdown -- 3.9 Million American Adults**




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

At 3.9 million, Festival Tourism Enthusiasts represent one-seventh of the 26.3 million Americans 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.

---

6 **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 Museum & Related Cultural Institution Enthusiasts at 9.5 million, Heritage Tourism Enthusiasts at 8.3 million and Soft Outdoor Adventure Enthusiasts at 7.1 million Americans, Festival Tourism Enthusiasts represent something of a *niche* market, similar in size to the Hard Outdoor Adventure Enthusiasts who come to Canada from the U.S.A. [see Table 1].

**Table 1: Market Size & Comparisons With Other Segments**

| | U.S.A. ADULTS | RECENT LEISURE TRAVELLERS TO CANADA | |
|---|---|---|---|
| | TOTAL | TOTAL | FESTIVAL ENTHUSIASTS |
| *Millions of Adults (18+)* | *200.4 million* | *26.3 million* | *3.9 million* |
| Festivals | 21.1 | 3.9 | 3.9 |
| Performing Arts Festivals | 6.4 | 1.4 | 1.4 |
| Themed Community Festivals | 10.7 | 1.7 | 1.7 |
| Museums & Related Cultural Institutions | 41.7 | 9.5 | 2.6 |
| Heritage | 34.5 | 8.3 | 2.8 |
| Visual Arts | 27.6 | 7.0 | 2.1 |
| Soft Outdoor Adventure | 35.5 | 7.1 | 1.6 |
| Wine/Culinary | 21.6 | 5.5 | 1.7 |
| Performing Arts | 15.6 | 3.8 | 2.1 |
| Hard Outdoor Adventure | 15.7 | 3.2 | 0.9 |

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

## 3.2. Market Sub-Groups & Activity Participation Rates

About one-third of the Americans in the broadly defined Festival market segment fall within the *Performing Arts Festival* market sub-sector. Of the 3.9 million Americans in the broader group, 1.4 million or 35% have gone to at least two of the following types of festivals while on a recent leisure trip:

Theatre Festivals .................................................. 1.1 million

Music Festivals ..................................................... 1.0 million

Literary Festivals .................................................. 0.7 million

The subset that falls within the *Themed Community Festival* tourism market is somewhat larger than the Performing Arts segment. Of the 3.9 million Americans in the Festival Tourism Enthusiast market, 1.7 million or 44% went to at least two types of the following festivals or events on a recent leisure trip:

Carnivals ............................................................... 0.9 million

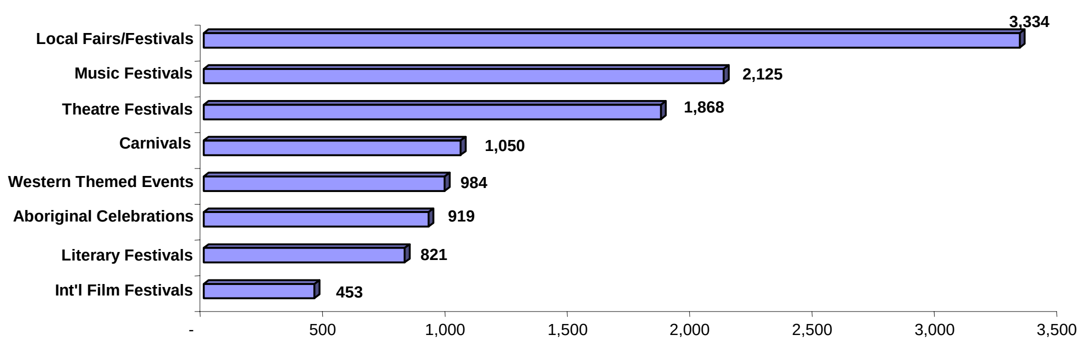
Local Fairs or Festivals......................................... 1.6 million

Western Theme Events ......................................... 0.9 million

Pow Wows or Other Aboriginal Celebrations ....... 0.9 million

Within the Festival Tourism Enthusiast market *as a whole*, **local festivals and fairs** attract the largest following, with over 8-in-10 Festival Tourism Enthusiast patrons claiming to have included a visit to one on a recent overnight leisure trip. Over two million, or more than half of these festival enthusiasts, went to a **music festival** and slightly fewer or about 1.9 million went to a **theatre festival** on a recent leisure trip. Festivals that are considerably less popular include carnivals such as Mardi Gras at about 1.1 million, western theme events such as a rodeo and Pow Wows or other Aboriginal celebrations at just under one million (each). Literary festivals or events attract about 1-in-5 Festival Tourism Enthusiasts.

**Activities That Define**
**Festival Tourism Enthusiasts**




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

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.

- Almost 3-in-4 share interests with **Heritage** Enthusiasts;
- Two-thirds are also **Museum & Related Cultural Institution** Enthusiasts; and
- Over 1-in-2 are also **Performing Arts** and/or **Visual Arts** Enthusiasts.
- Two-fifths share the interests of Wine/Culinary and/or Soft Outdoor Adventure Enthusiasts.

**Table 2: Market Share of Key Segments**

| | AMERICAN ADULTS | RECENT LEISURE TRAVELLERS TO CANADA | |
|---|---|---|---|
| MILLIONS OF ADULTS (18+) | TOTAL | TOTAL | FESTIVAL ENTHUSIASTS |
| Festivals | 11% | 15% | 100% |
| Heritage | 17% | 32% | 71% |
| Museums & Related Cultural Institutions | 21% | 36% | 65% |
| Performing Arts | 8% | 14% | 54% |
| Visual Arts | 14% | 27% | 53% |
| Wine/Culinary | 11% | 21% | 42% |
| Soft Outdoor Adventure | 18% | 27% | 41% |

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

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

# 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 1.4 million Americans in the Performing Arts Festival Tourism Enthusiast sub-group, representing approximately one-third of the total Festival Enthusiast market.

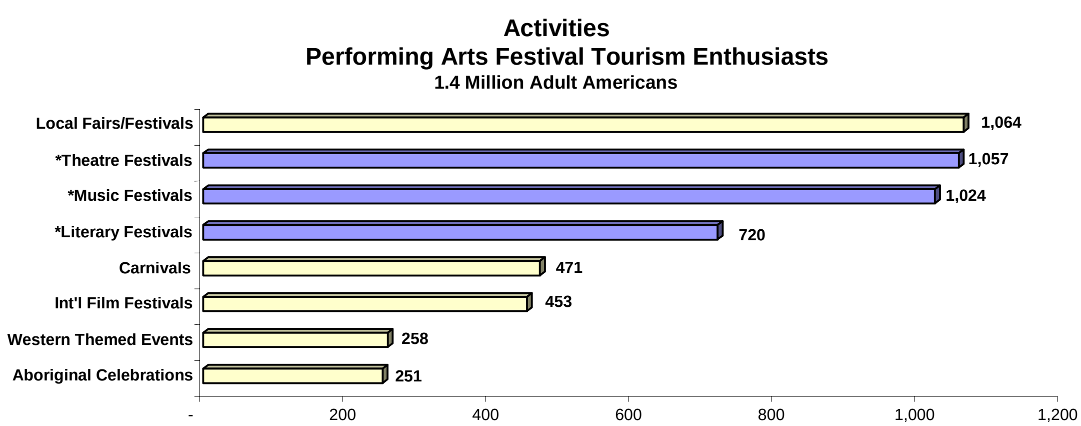
Three-quarters of the travellers within this market segment say that they have gone to a theatre festival (76%) and/or music festival while on recent trips (74%), followed by about one-half who claim to have attended a literary festival (52%) (percentages are the proportion of the Performing Arts Festival Tourism Enthusiast subset that included each of the listed events on recent trip itineraries).

Theatre Festivals ................. 1.1 million (76%)

Music Festivals .................... 1.0 million (74%)

Literary Festivals ................. 0.7 million (52%)

Local festivals and fairs are also widely popular among these tourists with 3-in-4 including such events on recent trips. About one-third claim to have gone to an international film festival on a recent leisure trip, and a similar proportion has attended a large-scale carnival such as Mardi Gras. Western themed events such as a rodeo and Pow Wows or other Aboriginal celebrations are not particularly popular among American Performing Arts Festival Tourism Enthusiasts, capturing only about one-fifth of this market (each).

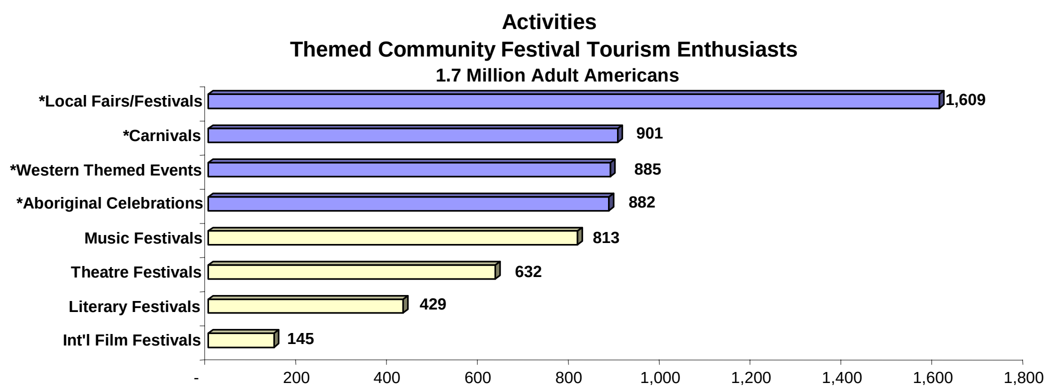



*Activities that define the market segment. Numbers in thousands of adult Americans in enthusiast market segment with recent trips to Canada. Source: TAMS, 2000.

## 4.2. Themed Community Festival Tourism Enthusiasts

Of the 3.9 million Americans in the broadly defined market segment, 1.7 million or 44% 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 carnival such as Mardi Gras, a Western themed event such as a rodeo or to a Pow Wow or other Aboriginal celebration. Music festivals and are also relatively widely attended by Themed Community Festival Tourism Enthusiasts, with approximately one-half claiming to have gone to such festivals while on recent travels. Approximately one-third say they have attended a theatre festivals and one-quarter have been to a literary festival on recent trips.




*Activities that define the market segment. Numbers in thousands of adult Americans in enthusiast market segment with recent trips to 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 .............1.6 million (92%)

Aboriginal celebrations...............0.9 million (50%)

Carnivals .....................................0.9 million (52%)

Western theme events .................0.9 million (51%)

# 5. Market Characteristics: Festival Tourism Enthusiasts

## 5.1. Where They Live and Where They Travel

Americans from all parts of the country are represented among Festival Tourism Enthusiasts. They are distributed in much the same way as is the market that comes to Canada from the U.S.A. as a whole (see Table 3). For the tourist market at large and for Festival Tourism Enthusiasts, Americans who live in states closest to the Canada/U.S.A. border tend to be over-represented and those who live furthest from the border – Tier III states – tend to be under-represented.

Specifically, fewer than 1-in-5 American adults live in Tier I states – those closest to the border – but 1-in-3 Festival Tourism Enthusiasts live in these border states.

Conversely, over 1-in-2 American adults live in Tier III states – those furthest from the border (including California) – but only about 2-in-5 Festival Tourism Enthusiasts live in this *long haul* market.

**Table 3: Place of Residence**

| | American Adults | Recent Leisure Travellers to Canada | |
|---|---|---|---|
| | Total | Total | Festival Enthusiasts |
| *Adults (18+)* | *200.4 million* | *26.3 million* | *3.9 million* |
| Tier I (Border States) | 18% | 33% | 32% |
| Tier II | 28% | 32% | 30% |
| Tier III | 54% | 35% | 39% |

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

**Table 4: Destinations Visited in Past 2 Years**

| | American Adults | Recent Leisure Travellers to Canada | |
|---|---|---|---|
| | Total | Total | Festival Enthusiasts |
| *Adults 18+* | *200.4 million* | *26.3 million* | *3.9 million* |
| **CANADIAN DESTINATIONS** | **13%** | **100%** | **100%** |
| Atlantic Canada | 2% | 12% | 10% |
| Quebec | 3% | 25% | 32% |
| Ontario | 7% | 55% | 63% |
| Manitoba/Saskatchewan | 1% | 7% | 8% |
| Alberta | 1% | 10% | 6% |
| British Columbia | 4% | 30% | 30% |
| Territories | 1% | 4% | 2% |
| **OTHER DESTINATIONS** | | | |
| Any U.S.A. Destination | 69% | 93% | 95% |
| Mexico/Caribbean | 15% | 25% | 30% |
| U.K./Other Europe | 8% | 18% | 27% |
| Other Countries | 7% | 15% | 18% |

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

About 1-in-8 of *all* American adults have travelled to Canada for an overnight trip in the past couple of years. Of those who have recent Canadian tourism experience, over half have been to an Ontario destination, close to one-third have been to a destination in British Columbia and one-quarter have been to Quebec (see Table 4).

Canadian destinations selected by the **festival market segment** closely parallel those of Americans with Canadian travel experience as a whole. Specifically, Ontario is the most popular destination, attracting over 3-in-5 Festival Tourism Enthusiasts. The strong showing for this province is undoubtedly related to the fact that the province is located immediately adjacent to the heavily populated Great Lakes Basin, including states such as New York, Michigan, Pennsylvania, Ohio and Illinois. For Americans living in these states, a trip to Ontario is a relatively *short haul* trip.

Quebec and British Columbia each attracts about one-third of the festival market while provinces in the Atlantic region attract about one-tenth. These levels are quite similar to those evident for the Canada-bound U.S.A. market as a whole. Similarly, Alberta (6%), Manitoba and Saskatchewan (8%) and the Territories (2%) attract American festival enthusiasts at close to the same rates as are manifest for *all* American travellers to Canada.

Canada faces stiff competition among Festival Tourism Enthusiasts. Practically all of these tourists have taken overnight leisure trips within their own country (95%), 3-in-10 have taken recent leisure trips to Mexico or the Caribbean (30%) and to Europe (27%) while 1-in-5 claim to have travelled to other countries recently (18%). The propensity of this segment to seek destinations in Europe or other countries is more pronounced than is the case within the market as a whole, suggesting that Canada's festivals may have to compete with destinations in Europe and other countries to attract these enthusiasts.

## 5.2. Demographic Characteristics

Festival Tourism Enthusiasts are as likely to be women (51%) as they are to be men (49%). They span the age spectrum, closely paralleling the "typical" American leisure tourist in Canada. Thus, about 1-in-4 are between 18 and 34 years, a further 1-in-5 are between 35 and 44 years, and close to 1-in-4 are between 45 and 54 years of age. On average, Festival Tourism Enthusiasts are about the same age as the typical American tourist in Canada – between 46 and 47 year of age.

**Table 5: Demographics – Gender & Age**

| | Recent Leisure Travellers to Canada | |
|---|---|---|
| | Total | Festival Enthusiasts |
| *Adults 18+* | *26.3 million* | *3.9 million* |
| Men | 51% | 49% |
| Women | 49% | 51% |
| | | |
| 18 - 34 years | 24% | 25% |
| 35 - 44 years | 20% | 19% |
| 45 - 54 years | 20% | 23% |
| 55 - 64 years | 14% | 15% |
| 65+ years | 17% | 14% |
| Average Age | 47.3 years | 46.7 years |

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

Festival Tourism Enthusiasts span the income and education spectrums. They are less likely to fall into the lowest education groups and are more likely have at least some post-secondary education than are American travellers to Canada as a whole. Despite their relatively high levels of education, these enthusiasts do not have especially high household incomes. Their average household income, at $68,100 (US$) is only marginally higher than the average American traveller to Canada at $65,200 (US$).

**Table 6: Demographics – Income & Education**

| | Recent Leisure Travellers to Canada | |
|---|---|---|
| | Total | Festival Enthusiasts |
| *Adults 18+* | *26.3 million* | *3.9 million* |
| **Household Income (US$)** | | |
| Under $40,000 | 26% | 28% |
| $40,000 - $59,999 | 24% | 19% |
| $60,000 - $99,999 | 31% | 32% |
| $100,000 or more | 19% | 21% |
| Average | $65,200 US | $68,100 US |
| | | |
| **Education** | | |
| Some Secondary or Less | 6% | 4% |
| Completed Secondary | 19% | 11% |
| Some Post Secondary | 45% | 55% |
| Graduated University | 30% | 31% |

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

Most Festival Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Nonetheless, 1-in-4 might be in the market for festival experiences that take into account the interests and needs of teenagers or children (26%) and almost 2-in-10 might seek content appropriate for children who are twelve years of age or under (19%).

**Table 7: Demographics – Household Composition**

| | Recent Leisure Travellers to Canada | |
|---|---|---|
| | Total | Festival Enthusiasts |
| *Adults 18+* | *26.3 million* | *3.9 million* |
| Adult Only | 71% | 74% |
| Any Teens/Children | 29% | 26% |
| Any Children under 12 | 22% | 19% |

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

## 5.3. Other Travel Activities

### 5.3.1. Other Cultural Activities

Festival Tourism Enthusiasts not only go to festivals and events . . . they also go many other heritage and cultural events and attractions when they travel. Approximately 3-in-4 go to local arts and crafts studios and/or history or heritage museums, 2-in-3 go to zoos, farmers' fairs or markets, aquariums and art galleries on their travels.

Other activities sought on trips by about 1-in-2 members of this market sector include science or technology museums, botanical gardens, historic sites and historical replicas of cities or towns. About 1-in-3 also go to planetariums while somewhat fewer seek out "pick-your-own" farm experiences, French Canadian cultural activities or Aboriginal cultural experiences in rural settings 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 American travellers to Canada as a whole.

**Table 8: Heritage/Museums and Related Cultural Institutions/Visual Arts Activities**

| | FESTIVAL ENTHUSIASTS |
|---|---|
| *Adults 18+* | *3.9 million* |
| Local arts & crafts studios | 77% |
| History/heritage museums | 71% |
| Zoos | 68% |
| Farmers' fairs or markets | 67% |
| Aquariums | 64% |
| Art galleries | 61% |
| Science/technology museums | 56% |
| Botanical gardens | 55% |
| Historic sites | 49% |
| Historical replicas of cities/towns | 48% |
| Planetariums | 32% |
| Pick your own farms / harvesting | 27% |
| French Canadian cultural experiences | 26% |
| Aboriginal cultural experiences in remote or rural setting | 24% |

*Source: Special TAMS Tabulations, pages 9-1/4*

**Table 9: Performing Arts / Wine & Culinary Activities**

| | FESTIVAL ENTHUSIASTS |
|---|---|
| *Adults 18+* | *3.9 million* |
| **PERFORMING ARTS** | |
| Theatre | 69% |
| Popular/rock & roll music concerts | 44% |
| Jazz music concerts | 41% |
| Classical music concerts | 38% |
| Ballet or other dance | 32% |
| Opera | 21% |
| Musical attractions (e.g., Jazzland) | 18% |
| **WINE/CULINARY** | |
| Internationally acclaimed restaurants | 59% |
| Winery touring | 46% |

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

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 American travellers to Canada as a whole. For example, going to live theatre performances while on trips is popular among 7-in-10 members of the festival segment (69%) but only about half this proportion of typical American travellers to Canada in total (39%).

Perhaps because of their interest in *music festivals*, more than 2-in-5 festival enthusiasts also go to popular or rock and roll concerts or jazz concerts while travelling. These levels of interest in concerts are twice as high as those evident among American travellers to Canada in total. Additionally, approximately 1-in-3 Festival Tourism Enthusiasts seek out classical music 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 two to three times the rate that would be found among American tourists in Canada as a whole.

Three-fifths of Festival Tourism Enthusiasts are in the market for dining at internationally acclaimed restaurants when they travel and almost one-half 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 American 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 10: Outdoor Activities Used To Define Soft Outdoor Adventure Market Segment**

| | FESTIVAL ENTHUSIASTS |
|---|---|
| *Adults 18+* | *3.9 million* |
| Hiking/backpacking in wilderness settings | 39% |
| Cycling | 33% |
| Motor boating | 32% |
| Horseback riding | 30% |
| Kayaking or canoeing | 29% |
| Downhill skiing | 20% |
| Sailing | 17% |
| Cross-county skiing | 14% |
| Snowmobiling | 12% |
| Motorcycling | 8% |
| Hot air ballooning | 7% |
| Snowboarding | 4% |
| Wind surfing | 2% |

*Source: Special TAMS Tabulations, page 8.*

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 (39%). About 3-in-10 of these tourists also claim to go cycling, motor boating, kayaking or canoeing, and/or horseback riding while on trips, and approximately one-fifth go downhill skiing.

"Gentler" encounters with the outdoors – activities such as such as wildlife (53%) and wildflower viewing (47%) – also attract about half of these tourists. Fishing attracts about one-third of them, while slightly fewer claim to have been golfing, bird watching or whale watching while on their travels over the past couple of years.

**Table 11: Other Outdoor Activities**

| | FESTIVAL ENTHUSIASTS |
|---|---|
| *Adults 18+* | *3.9 million* |
| Wildlife viewing | 53% |
| Wildflowers / flora viewing | 47% |
| Fishing | 32% |
| Golfing | 27% |
| Whale watching | 25% |
| Bird watching | 22% |
| Seeing northern lights/ other artic experiences | 10% |

*Source: Special TAMS Tabulations, pages 8-1/3.*

### 5.3.3. Activities At Home

Not only do many Festival Tourism Enthusiasts go to festivals, concerts and theatre performances when *on trips,* but close to 8-in-10 of them go to these performances on a frequent or occasional basis in their *home* communities. They go to these performances and 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" American traveller to Canada.

**Table 12: Frequent/Occasional Activities At Home**

| | Recent Leisure Travellers to Canada | |
|---|---|---|
| | Total | Festival Enthusiasts |
| *Adults 18+* | *26.3 million* | *3.9 million* |
| Museum | 68% | 80% |
| Live theatre | 60% | 79% |
| Music concerts | 66% | 78% |
| Zoo/botanical garden | 60% | 76% |
| Art gallery/art show | 54% | 65% |
| Casino | 35% | 40% |
| Ballet | 20% | 34% |
| Opera | 18% | 24% |

*Source: Special TAMS Tabulations, pages 19; 34.*

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.

## 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 Americans in this market segment that refrain from offering an opinion.

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

- A place with beautiful scenery;
- A place that is clean and well-cared for;
- A great place for fishing;
- A place with lots of things for mature adults to see and do; and
- A great place to relax and get away from it all.

They also rate Canada favourably for having a lot for *families to see and do,* for having *friendly people*, for being *safe*, and, among those who offer an opinion, as a good *hunting* destination. Positive ratings are also offered for having a lot for *young adults to see and do,* being a place to experience *adventure and excitement* and/or *city life*, as a destination for *outdoor activities, cultural events and attractions,* and as a place to visit in the *summer.*

Less favourable ratings are accorded attributes associated with experiencing *different cultures and ways of life* including *Aboriginal culture, historic sites,* and having *interesting shops.* Americans in the Festival Tourism Enthusiast segment are least positive about Canada as a place for to experience *the good life*, as a *popular or trendy* destination and as one that is attractive in the *winter*.

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

**Table 13: Attitudes Toward Canada**

| | Recent Leisure Travellers to Canada | | |
|---|---|---|---|
| | Total | Festival Enthusiasts | |
| *Adults 18+* | *26.3 million* | *3.9 million* | |
| | Average (#) | Average (#) | Can't Rate (%) |
| Beautiful scenery | 9.2 | 9.0 | 3% |
| Clean/well cared for | 8.7 | 8.8 | 5% |
| Great place for fishing | 8.7 | 8.8 | 35% |
| Lots for mature adults | 8.6 | 8.6 | 7% |
| Great place to relax | 8.6 | 8.6 | 4% |
| Great place for hunting | 8.4 | 8.6 | 49% |
| Lots for families | 8.5 | 8.5 | 11% |
| Place with friendly people | 8.4 | 8.5 | 4% |
| Safe for visitors | 8.3 | 8.4 | 8% |
| Respects natural environment | 8.5 | 8.3 | 7% |
| Lots for young adults | 8.1 | 8.3 | 16% |
| Great place to experience adventure & excitement | 8.0 | 8.3 | 13% |
| Great place to experience city life | 7.7 | 8.3 | 9% |
| One of best destinations for outdoor activities | 8.2 | 8.2 | 16% |
| One of best summer destinations | 8.1 | 8.2 | 8% |
| Many cultural events & attractions | 7.8 | 8.2 | 9% |
| Place with interesting shops | 8.0 | 8.1 | 9% |
| Offers excellent value for money | 7.9 | 8.0 | 5% |
| Great place to experience different cultures | 7.6 | 7.9 | 10% |
| Great place to see historic sites | 7.5 | 7.9 | 9% |
| Place for romance | 7.2 | 7.8 | 22% |
| Great place for Aboriginal culture | 7.4 | 7.7 | 25% |
| Great place to experience "good life" | 7.1 | 7.5 | 15% |
| Popular, trendy place | 6.6 | 6.9 | 18% |
| One of best winter destinations | 6.3 | 6.4 | 20% |

*Source: Special TAMS Tabulations, Table 13. Average ratings are based on those rating Canada on a ten point bi-polar scale ranging from 10 "agree completely" to 1 "disagree completely". *Less than 0.5%.*

## 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.

Americans in this market segment are avid daily local newspaper readers (92%). Furthermore, almost two-thirds of them claim to read the *travel section* of weekday editions of daily newspapers on a regular basis and even more – three-quarters – claim to read or look through the *travel section* of the weekend editions of a local newspaper.

They are also avid magazine readers (98%). Travel, hobby, news magazines and National Geographic capture the most widespread regular readership. Compared to the *average* American tourist to Canada, those in the festival market are particularly likely to read travel magazines and National Geographic.

**Table 14: Print Media Read Regularly**

| | FESTIVAL ENTHUSIASTS |
|---|---|
| *Adults 18+* | *3.9 million* |
| **DAILY NEWSPAPER (ANY)** | **92%** |
| Weekday edition | 81% |
| Travel section of weekday edition | 63% |
| Weekend edition | 89% |
| Travel section of weekend edition | 76% |
| Community newspapers | 83% |
| **ANY MAGAZINES** | **98%** |
| Travel magazines | 53% |
| Hobby magazines | 50% |
| National Geographic | 50% |
| News magazines | 48% |
| Fashion/homemaking magazines | 36% |
| General interest/city life magazines | 31% |
| Sports magazines | 30% |

*Source: Special TAMS Tabulations, page 14.*

**Table 15: Television Programs Viewed Regularly**

| | FESTIVAL ENTHUSIASTS |
|---|---|
| *Adults 18+* | *3.9 million* |
| Movies | 71% |
| Nature shows | 62% |
| Early evening news | 62% |
| Professional sports | 56% |
| Evening drama | 54% |
| Late evening news | 52% |
| Evening sitcoms | 49% |
| News magazine shows | 48% |
| Instructional/hobby shows | 40% |
| Morning news | 40% |
| Daytime programs on weekdays | 20% |

*Source: Special TAMS Tabulations, page 16.*

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 three-fifths claim to watch nature shows and early evening news broadcasts. Approximately half say they watch professional sports, evening dramas, late evening news, evening sitcoms and/or news magazine shows on a regular basis. These television viewing habits are essentially the same as those reported by American travellers to Canada 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 Americans claim to be members of an art gallery or museum, a zoo or botanical garden. Nonetheless, one-quarter claim to be members of a local art gallery or museum and three-fifths are members of an auto club (e.g., AAA). Since most Americans drive to their destinations in Canada, this type of organization may offer marketers a viable communications conduit to this market.

**Table 16: Club/Organization Memberships**

| | FESTIVAL ENTHUSIASTS |
|---|---|
| *Adults 18+* | *3.9 million* |
| Auto club | 59% |
| Sports club | 36% |
| Art gallery/museum | 25% |
| Nature organization | 14% |
| Zoo/botanical garden | 14% |
| Gardening club | 4% |

*Source: Special TAMS Tabulations, page 17.*

# 6. Projections to 2025

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%. 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.[7]

The U.S.A. Festival Tourism Enthusiast market is also expected to increase over time, from 3.9 million to about 5.0 million by 2025. At a rate of 26%, this growth is on par with the national average. Each of the subsets within this tourism segment is expected to increase in size over the next two decades, with Themed Community Festival enthusiasts growing at a higher rate than the Festival Tourism Enthusiast market as a whole:

Performing Arts Festival Tourism Enthusiasts ................... From 1.4 million to 1.8 million

Themed Community Festival Tourism Enthusiasts ............ From 1.7 million to 2.7 million

Further analysis of projected changes within the U.S.A. Festival Tourism Enthusiast market is not available because of methodological considerations. A discussion of more general changes anticipated for the American tourism market is provided in the appendix to this report.

[7] 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 U.S.A. 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 U.S.A.. 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 US TAMS Mailback Questionnaire**

| | UNWEIGHTED RECORDS – MAILBACK |
|---|---|
| Adult Leisure Travellers to Canada in the Past 2 Years | 1,509 |
| Festival Enthusiasts | 242 |
| Arts Festival Enthusiasts | 87 |
| Themed Community Festival Enthusiasts | 101 |
| Museums/Related Cultural Institutions Enthusiasts | 577 |
| Museum Tourism Enthusiasts | 550 |
| Museum Related Cultural Institution Tourism Enthusiasts | 404 |
| Soft Outdoor Adventure Enthusiasts | 419 |
| Hard Outdoor Adventure Enthusiasts | 177 |
| Wine/Culinary Enthusiasts | 341 |
| Heritage Enthusiasts | 498 |
| Performing Arts Enthusiasts | 244 |
| Visual Arts Enthusiasts | 429 |
| Winter Outdoors (excluding alpine skiing) | 227 |
| Alpine Skiing | 254 |

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

## 7.3. 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**

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

| | % OF ADULT POPULATION IN . . . | | GROWTH RATE FROM 2000 TO 2025 | IMPACT OF 2025 POPULATION STRUCTURE ON GROWTH RATE |
|---|---|---|---|---|
| | 2000 | 2025 | | |
| *Adult Population* | *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% 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% 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% 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% 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% more than there were in 2000 but changes in the population structure bring this number down to 68.9 million or 14% more than there were in 2000, for a difference in the growth rate [14%/27%] of –50%.

### 7.3.1. Regional Changes in the U.S.A. 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%).

**Table A-1: Shifts in U.S.A. Adult Population**

| *Adults 18+ in Millions* | U.S.A. Adult Population In . . . | | Growth Rate from 2000 to 2025 | Impact of 2025 Population Structure on Growth Rate |
|---|---|---|---|---|
| | 2000 | 2025 | | |
| Total U.S.A. | 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 section 7.4 below for definition of Tiers*

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 U.S.A. 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 U.S.A. adult population, and will grow at a 38% higher rate than would have been anticipated given the current population structure (see Appendix for the states included in each of the three 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-2, appended for population estimates for each U.S. Census region).

### 7.3.2. Demographic Changes in the U.S.A. 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.

**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% to 16% 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.

**Table A-2: U.S.A. Adult Population – Age & Gender**

| | % 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.*

- 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% 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.

### 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 A-3: 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.*

### 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% to 64%.

**Table A-4: 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.*

### 7.3.3. 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 American 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 A-5: 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.

## 7.4. 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.

## 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)

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

Horse races

National or international sporting events such as the Olympic 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

BUSINESS ACTIVITIES

Attend business meetings out of town

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