Canada's Museum Tourism Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey

TAMS

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Canadian Tourism Commission
Commission canadienne du tourisme

Canada

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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 new *Québec Museum of Folk Culture* (Trois-Rivières, Québec)
Credit:	Julie Gascon
Photo (Top):	*Dr. Sun Yat-Sen Classical Chinese Gardens* (Vancouver, British Columbia)
Credit:	Yat-Sen Classical Chinese Gardens.
Photo (Middle):	The new *Canadian War Museum,* to open in 2005 (Ottawa, Ontario)
Credit:	Model by Moriyama & Teshima Architects of Toronto and Griffiths Rankin Cook of Ottawa.
Photo (Bottom):	*Les Trois Pignons*, a cultural and information centre. Chéticamp, Cape Breton (Nova Scotia)
Credit:	The Commission du tourisme acadien du Canada atlantique, a CTC Product Club

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1. Introduction

Canada's museums, related cultural institutions, 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 **Museum & Related Cultural Institution Tourism Enthusiasts,** based on the Travel Activities and Motivation Survey (TAMS).[2]

This report describes the characteristics and tourism activity preferences of Canada's Museum & Related Cultural Institution Tourism Enthusiasts - Canadians who exhibit a particular interest in museums and other related cultural institutions 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 museologists or cultural specialists. Thus, the list includes items such as *general history or heritage museums* that are not necessarily consistent with standard museum 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 museums and related cultural institutions.

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

Museum & Related Cultural Institution Tourism Enthusiasts

At least two as an activity on a recent leisure trip:	***AND at least one:***
Art Galleries;	Botanical Gardens;
General History/Heritage Museums;	Zoos;
Aboriginal-Themed Museums	Planetariums;
Children's Museums;	Aquariums.
Science/Technology Museums;	

[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.

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

Art Galleries;
General History/Heritage Museums;
Aboriginal-Themed Museums
Children's Museums;
Science/Technology Museums.

Related Cultural Institution Tourism Enthusiasts: At least two of the following as an activity on a recent leisure trip:

Botanical Gardens;
Zoos;
Planetariums;
Aquariums.

These tourists provide a rich source of information for museums, related cultural institutions, tourism packagers, and DMOs that want to increase or retain the Museum & Related Cultural Institution Tourism Enthusiast market in Canada in the future.

In addition to a *current* profile of Museum & Related Cultural Institution 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.[4]

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 Museum & Related Cultural Institution Tourism Enthusiast market.

Toronto
September 2003

[4] 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 3.2 million are Museum & Related Cultural Institution Tourism Enthusiasts (14%). 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 museums and related cultural institutions is approximately 2.7 million adults.
- Museums, other cultural institutions, tourism packagers, and DMOs might develop marketing and packaging strategies around the considerable overlap between Canadian tourists who go to museums and those who go to related cultural institutions such as botanical gardens and zoos. Over 6-in-10 or 1.7 million of the 2.7 million Canadians in the more broadly defined market segment are *dual* patrons. That is to say, they have been to at least two types of museums and at least two types of related cultural institutions on recent leisure trips. Most of the remaining Canadian travellers in the broadly defined market segment go to at least two museums but to only one of the related cultural institutions when they travel (35%).
- Canadians from all parts of the country are represented among Museum & Related Cultural Institution 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, museums and related cultural institutions along with DMOs and tourism packagers might focus on the regions of Canada that have particularly high "attraction rates" for Museum & Related Cultural Institution Tourism Enthusiasts.[5] Those that are especially successful in this regard include Atlantic Canada, Alberta and British Columbia. Between two and three times as many Museum & Related Cultural Institution 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 Museum & Related Cultural Institution Tourism Enthusiast segment. Two-fifths of these tourists say they have taken a leisure trips to the United States (40%) 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 almost twice this proportion of Museum & Related Cultural Institution Tourism Enthusiasts make this claim (15%).

2.2. Demographic Characteristics

- Museum & Related Cultural Institution Tourism Enthusiasts are more likely to be women (56%) than they are to be men (44%). They span the age spectrum with a concentration among middle-aged and slightly older Canadians.
- Most Museum & Related Cultural Institution Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Nonetheless, close to 4-in-10 might be in the market for exhibitions and experiences that take into account the interests and needs of teenagers or children (38%).
- These enthusiasts span the income and education spectrums. They are slightly less likely to fall into the lowest income and education groups than are Canadian travellers as a whole.

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

Consequently, their average household income, at $58,200 (Cnd$) is marginally higher than the average Canadian traveller's at $54,900 (Cnd$).

- While they are no more likely to have high incomes – $100,000 or more – than the average traveller (11% each), they are noticeably more likely to have some post secondary (44%) or university education (27%) than is the travelling public in general (39% and 21% respectively).

2.3. Cultural Activities

- Whether within the broadly defined Museum & Related Cultural Institution Tourism Enthusiast segment or within either of the subsets of this market, **general history or heritage museums** attract the largest following, with 9-in-10 museum and related cultural institution patrons claiming to have included a visit to one of these museums on a recent overnight leisure trip. **Zoos, art galleries** and **science/technology museums** are also widely popular, each attracting at least 2-in-3 Museum & Related Cultural Institution Tourism Enthusiasts.
- **Aquariums** and **botanical gardens** are included on trip itineraries by over 5-in-10 Canadians in this market segment. **Planetariums** are somewhat less popular, attracting about 3-in-10. Since most members of the museum and related cultural institution market live in adult-only households, it is not surprising that **children's museums** are less widely visited among tourists in this market segment, attracting about 3-in-10 tourists. **Aboriginal-themed museums attract** about 1-in-10 members of this tourist segment.
- Because Museum & Related Cultural Institution Tourism Enthusiasts also go 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 and local festivals and fairs to museum-based packages. These experiences are sought by at least 1-in-2 Museum & Related Cultural Institution Tourism Enthusiasts.
- Other activities sought on trips by about 1-in-3 members of this market sector include historic sites, replicas of cities or towns, and harvesting or "pick-your-own" farm experiences. About 1-in-5 go to French Canadian cultural activities on their travels. These attractions and activities might be included as components of packages and promotions when museums and related cultural institutions or DMOs attempt to attract Canadians in this market sector.
- Since they are particularly likely to go to museums, galleries and cultural events in their home communities, *local* cultural events and institutions including theatres, other performance venues, museums and art galleries, along with zoos and botanical gardens may prove to be very useful communication routes for reaching potential museum and related cultural institution tourists with messages about culture-oriented travel opportunities in *other* parts of Canada.

2.4. Overlap With Other Activity-Based Segments

- Almost 1-in-2 Museum & Related Cultural Institution Tourism Enthusiasts share interests with **Heritage** Enthusiasts (1,317,000) and about one-third have tourism activity profiles that are consistent with **Visual Arts** Enthusiasts (37%, or 1,010,000) and **Soft Outdoor** Adventurers (36%, or 978,000).
- One-quarter share the interests of **Festival** Enthusiasts (25% or 679,000) while about one-fifth are also **Wine/Culinary** Tourism Enthusiasts (21%, or 558,000) and/or **Performing Arts** Enthusiasts (21% or 580,000).
- These overlaps suggest opportunities for cross-market packaging and promotion *within* cultural tourism products and *between* museums and outdoor experiences for the domestic museum and related cultural institution 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 Museum & Related Cultural Institution 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 for fishing;
  - A great place to relax and get away from it all;
  - One of the best summer destinations.
- These tourists also rate Canada favourably for being a good *hunting* destination, being *safe*, having *friendly people*, for being *clean and well cared for*, having tourism activities for *mature* and for *young adults*, as a place to experience *adventure and excitement*, and for offering many *cultural events and attractions*.
- Less favourable ratings are accorded attributes associated with *shopping opportunities*, as a place to *experience city life* or to experience *different cultures and ways of life* including *Aboriginal culture*, for *respecting the natural environment*, as a *winter destination*, as a place for *romance*, *value for money* and for experiencing *the "good life"*. Canadians in the Museum & Related Cultural Institution Tourism Enthusiast segment are least positive about their country 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. This attitudinal similarity with the *average* Canadian traveller is consistent with the strong demographic resemblances between the typical Canadian tourist and the Museum & Related Cultural Institution Tourism Enthusiast.
- 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. Similarly, the relatively low rating accorded Canada as a *winter* destination by potential domestic tourists may have to be addressed if this target market is to contribute to load shifting from the peak summer tourism season to shoulder and winter months.
- 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

- Museums, related cultural institutions, tourism packagers, operators and DMOs can also look to the number of trips Canadians take that include going to museums and related cultural institutions to understand the important contribution Museum & Related Cultural Institution Tourism Enthusiasts make to tourism in Canada as a whole.[6]

[6] The TAMS study provides information about the number and characteristics of *people* in the market for museums and related cultural institutions 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 the following activities associated with the museum/related cultural institution market: attend Aboriginal/native cultural event; visit a zoo, aquarium, botanical garden; visit a museum or art gallery.

- According to the Canadian Travel Survey, of the 95.2 million overnight domestic trips taken by Canadians Canada during 2002[7], approximately 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. An Aboriginal cultural event was part of the itinerary on about 1.2 million overnight person trips by Canadians in 2002.
- 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.

2.7. Cross-Border Differences

When packaging and marketing museums and related cultural institutions, tourism planners, marketers and DMOs may have to develop a two-tier strategy – one for Canadians and one for Americans. American Museum & Related Cultural Institution 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 Museum & Related Cultural Institution 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 Museum & Related Cultural Institution 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 museums and related cultural Institutions between 2000 and 2026, from an estimated 3.2 million now to about 4.3 million in 2026. Canada's likely share of this market – those who will seek museum or related cultural institution experiences and take leisure trips within Canada – is also expected to grow from 2.7 million to 3.5 million. At 29%, this growth rate is very similar to Canada's growth rate overall.
- Markets for museums and related cultural institutions that have a particular appeal to older tourists – most notably botanical gardens and Aboriginal-themed museums – will grow at appreciably higher rates than the population in total. In contrast, children's museums, with their special appeal to young families, will grow over the next two decades by only 12% – an appreciably lower rate than Canada's adult population.

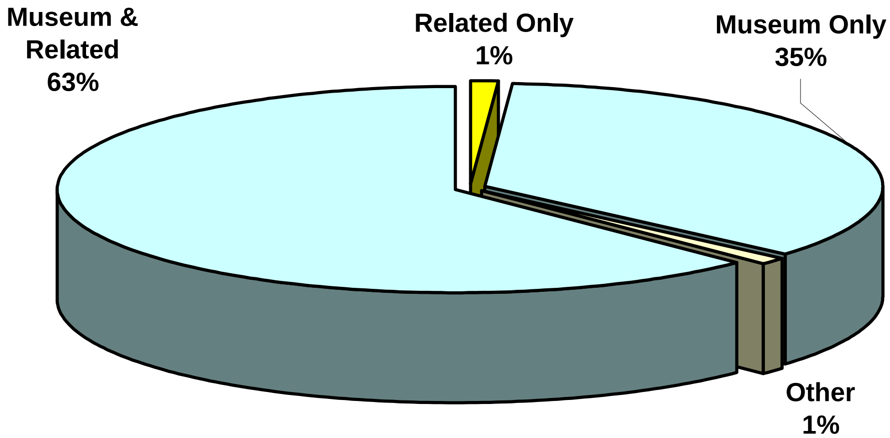
[7] Overnight person visits in Canada in calendar year 2002.

3. An Overview of Market Size

3.1. Total Market Size

In 2000, approximately 2.7 million adult Canadians who took a leisure trip within Canada over a two-year period fell within the Museum & Related Cultural Institution Enthusiast market. This market share represents 1-in-8 of Canada's 23.3 million adults (12%).

Museum/Related Cultural Institution Enthusiasts Market Breakdown -- 2.7 Million Canadian Adults



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

The segment includes just under 2.7 million tourists who are *Museum Tourism Enthusiasts* and 1.7 million who are *Other Related Cultural Institution Tourism Enthusiasts* (see footnote for definitions of these market segments).[8] Overlap between the two subsets is comparatively high, with almost 2-in-3 of the 2.7 million Canadians in the market segment falling into *both* the museum and related cultural institution subsets.

[8] **High Intensity Museum/Related Cultural Institution Tourism Enthusiasts** - 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 Museum Tourism Enthusiasts- High Intensity Museum/Related Cultural Institution Tourism 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 Related Cultural Institution Tourism Enthusiasts - High Intensity Museum/Related Cultural Institution Tourism Enthusiasts with at least two of the following: Botanical Gardens; Planetariums; Zoos; Aquariums.
See Appendix for definitions of other high intensity activity groups.

At 2.7 million, Museum & Related Cultural Institution Tourism Enthusiasts represent one-fifth of the 14.0 million Canadians who took leisure trips in Canada over a two-year period. They surpass all other market segments examined, with the exception of Soft Outdoor Adventure Enthusiasts (4.4 million) [see Table 1].

Table 1: Market Size & Comparisons With Other Segments

	Canadian Adults	Recent Leisure Travellers in Canada	
	Total	Total	Museum & Related Cultural Institution Enthusiasts
Millions of Adults (18+)	*23.3 million*	*14.0 million*	*2.7 million*
Museums & Related Cultural Institutions	3.1	2.7	2.7
Museums	3.1	2.7	2.7
Related Cultural Institutions	2.0	1.7	1.7
Festivals	2.0	1.7	0.7
Heritage	2.6	2.2	1.3
Visual Arts	2.1	1.7	1.0
Performing Arts	1.3	1.1	0.6
Wine/Culinary	1.8	1.5	0.6
Soft Outdoor Adventure	5.3	4.4	1.0
Hard Outdoor Adventure	1.6	1.3	0.5

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

3.2. Market Sub-Groups & Activity Participation Rates

Almost all Canadians in the broadly defined market segment fall within the *museum* market sub-sector. Of the 2.724 million Canadians in the broader group, 2.664 million or 98% have gone to at least two of the following types of museums or galleries while on a recent leisure trip:

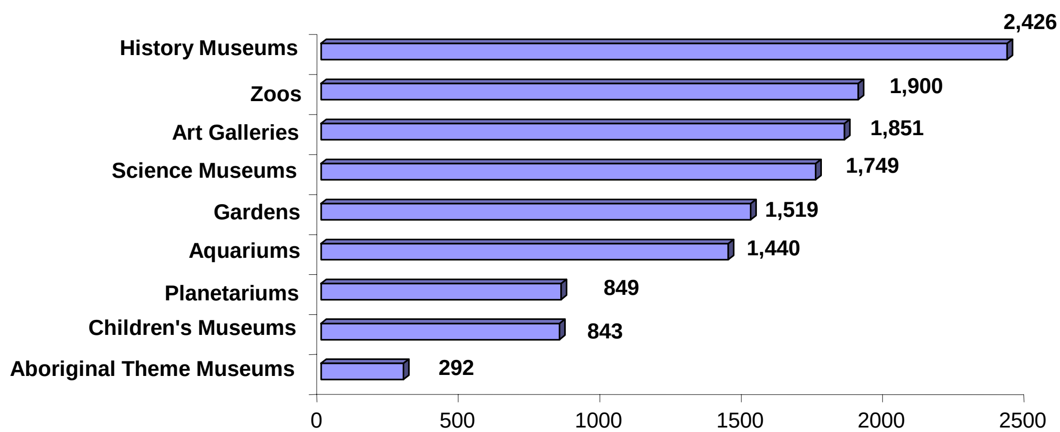
General history/heritage museums ....2.4 million
Art galleries...1.8 million
Science and technology museums.......................1.7 million
Children’s museums..0.8 million
Aboriginal-themed museums ....0.2 million

The subset that falls within the *related cultural institutions* tourism market is noticeably smaller, in large part because of the manner in which it was defined. Of the 2.724 million Canadians who travelled in Canada recently and went to at least two types of museums on recent trips, 1.731 million or 64% *also* went to at least two of the following other cultural institutions on a recent leisure trip:

Zoos ....1.5 million
Aquariums...1.3 million
Botanical gardens..1.1 million
Planetariums..0.8 million

Whether within the broadly defined Museum & Related Cultural Institution Tourism Enthusiast segment or within either of the subsets of this market, **general history or heritage museums** attract the largest following, with 9-in-10 museum and related Cultural Institution patrons claiming to have included a visit to one of these museums on a recent overnight leisure trip. **Zoos, art galleries** and **science/technology museums** are also widely popular, each attracting at least 2-in-3 Museum & Related Cultural Institution Tourism Enthusiasts.

Activities That Define Museum/Related Cultural Institution Enthusiasts



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

Aquariums and **botanical gardens** are included on trip itineraries by over 5-in-10 Canadians in this market segment while **planetariums** are somewhat less popular, attracting about 3-in-10. Since most members of this market live in adult-only households, it is not surprising that **children's museums** are less widely visited among tourists in this market segment, attracting about 3-in-10 tourists. **Aboriginal-themed museums attract** about 1-in-10 members of this tourist segment.

Museum & Related Cultural Institution 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 1-in-2 share interests with **Heritage** Enthusiasts (1,317,000).
- About one-third have tourism activity profiles that are consistent with **Visual Arts** Enthusiasts (37%, or 1,010,000) and **Soft Outdoor** Adventurers (36%, or 978,000).
- One-quarter shares the interests of **Festival** Enthusiasts (25% or 679,000).
- About one-fifth are also **Wine/Culinary** Tourism Enthusiasts (21%, or 558,000) and/or **Performing Arts** Enthusiasts (21% or 580,000).

Table 2: Market Share of Key Segments

Millions of Adults (18+)	Canadian Adults	Recent Leisure Travellers in Canada	
	Total	Total	Museum & Related Cultural Institution Enthusiasts
Museums & Related Cultural Institutions	14%	19%	100%
Heritage	11%	15%	48%
Visual Arts	9%	12%	37%
Soft Outdoor Adventure	23%	31%	36%
Festivals	9%	25%	25%
Wine/Culinary	8%	11%	21%
Performing Arts	6%	8%	21%

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* museums and outdoor experiences for the domestic Museum & Related Cultural Institution Tourism Enthusiast market.

4. Museums Versus Related Cultural Institutions

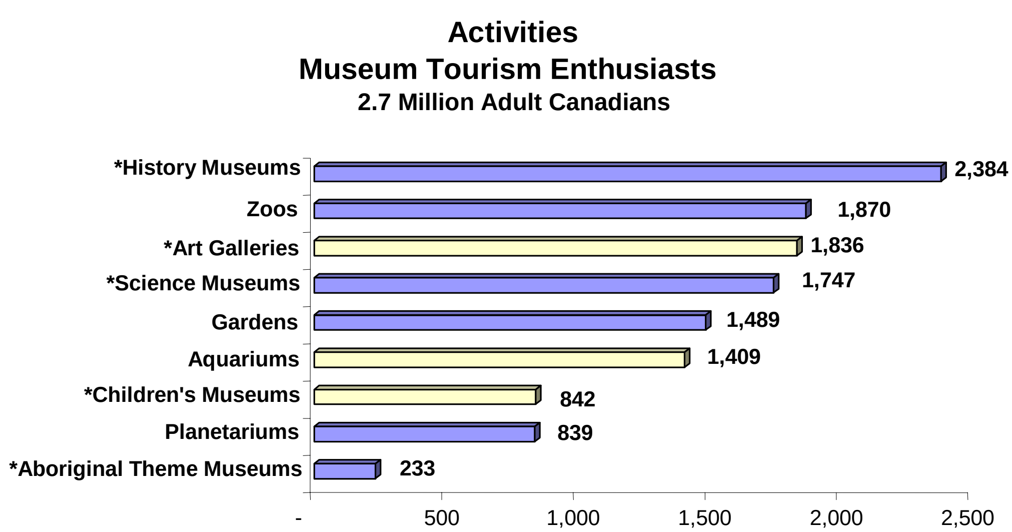
4.1. Museum Tourism Enthusiasts

In this and the following section, key characteristics and areas of differentiation between the two market subsets – Museum Tourism Enthusiasts and Related Cultural Institution Tourism Enthusiasts – are examined. As noted earlier, there are 2.66 million Canadians in the Museum Tourism Enthusiast sub-group. Almost all the travellers within this market segment say that they have gone to general history/heritage museums while on their trips (90%), followed at a considerable distance by art galleries (69%) and/or science and technology museums (66%).

As evident in the list provided below, children's museums and Aboriginal-themed museums are appreciably less popular among these museum goers (percentages are the proportion of the Museum Tourism Enthusiast subset that included each of the listed institutions on recent trip itineraries).

General history/heritage museums............. 2.4 million (90%)
Art galleries.. 1.8 million (69%)
Science and technology museums .... 1.7 million (66%)
Children's museums................................... 0.8 million (32%)
Aboriginal-themed museums .... 0.2 million (9%)

Experiences that focus on animals and plants are also popular among these museum visitors. Seven-in-ten of them claim to have visited a zoo on a recent leisure trip, and over half went to a botanical garden (56%) and/or an aquarium (53%). Not only are they interested in animals and plants in *built structures* but at least half of them claim to go wildlife viewing (56%) and slightly fewer view wildflowers and other flora (43%) in the *outdoors.*[9]



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

[9] See individual activities participated in on trips, Detailed Tables, TAMS Canada, page 9-1.

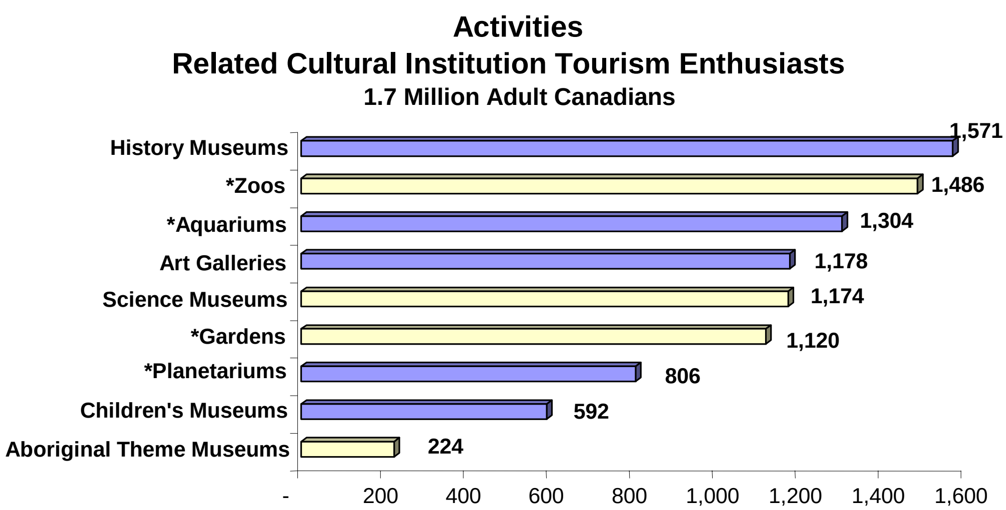
4.2. Related Cultural Institution Tourism Enthusiasts

Of the 2.724 million Canadians in the broadly defined market segment, 1.731 million or 64% have gone to at least two types of related cultural institutions while on a recent leisure trip.

Zoos, aquariums and botanical gardens are especially popular within this group. Planetariums are less widely visited, possibly because they are not as widely available in tourism destinations as are other types of related cultural institutions.

The percentages shown below represent the proportion of the Related Cultural Institution Tourism Enthusiast subset that claim to have gone to each of the listed institutions on recent trips.

Zoos .... 1.5 million (86%)
Aquariums.................................... 1.3 million (75%)
Planetariums................................. 1.1 million (65%)
Botanical gardens.......................... 0.8 million (47%)



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

5. Market Characteristics: Museums & Related Cultural Institutions

5.1. Where They Live and Where They Travel

Table 3: Place of Residence

	CANADIAN ADULTS	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	TOTAL	MUSEUM & RELATED CULTURAL INSTITUTION ENTHUSIASTS
Adults (18+)	*23.3 million*	*14.0 million*	*2.7 million*
Atlantic Canada	8%	8%	5%
Quebec	25%	24%	24%
Montréal CMA	12%	11%	16%
Ontario	38%	35%	41%
Toronto CMA	16%	12%	16%
Manitoba/Saskatchewan	7%	8%	7%
Alberta	9%	11%	12%
British Columbia	13%	15%	13%
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.

Canadians from all parts of the country are represented among Museum & Related Cultural Institution Tourism Enthusiasts. They are distributed in much the same was 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 Museum & Related Cultural Institution Tourism Enthusiasts claim to have taken leisure trips to these destinations in the past couple of years: Atlantic Canada (21%), Alberta (26%) and Manitoba/Saskatchewan (16%) than is the case with the more populous provinces.

Some regions can be said to have particularly high "attraction rates" compared to others because they lure high levels of Museum & Related Cultural Institution 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 Museum & Related Cultural Institution 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 museum-oriented tourists relative to its population – this province represents 38% of the country's adults and 55% of Museum & Related Cultural Institution Tourism Enthusiasts, for an "attraction rate" of 1.4. Quebec falls between the high levels evident for Canada's eastern and western regions, representing 25% of the adult population and attracting 41% of Museum & Related Cultural Institution 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 Museum & Related Cultural Institution Tourism Enthusiast segment. Two-fifths of these tourists say they have taken a leisure trips to the United States (40%) 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 almost twice this proportion of Museum & Related Cultural Institution Tourism Enthusiasts make this claim (15%). 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	MUSEUM & RELATED CULTURAL INSTITUTION ENTHUSIASTS
Adults 18+	*23.3 million*	*14.0 million*	*2.7 million*
CANADIAN DESTINATIONS	**60%**	**100%**	**100%**
Atlantic Canada	11%	18%	21%
Quebec	21%	36%	41%
Ontario	29%	48%	55%
Manitoba/Saskatchewan	9%	15%	16%
Alberta	14%	24%	26%
British Columbia	18%	30%	34%
Territories	1%	1%	2%
OTHER DESTINATIONS			
Any U.S.A. Destination	29%	36%	40%
Mexico/Caribbean	9%	9%	11%
U.K./Other Europe	8%	9%	15%
Other Countries	6%	6%	9%
Sun/Sea Destinations	20%	23%	25%
Any Locations Outside Canada (NET)	39%	45%	50%

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

5.2. Demographic Characteristics

Museum & Related Cultural Institution Tourism Enthusiasts are more likely to be women (56%) than they are to be men (44%). They span the age spectrum with a concentration among middle-aged and slightly older Canadians. Several differences in the gender split are manifest among subsets of the broader museum and related cultural institution market:

- Art gallery patrons are especially likely to be women (59%);
- Zoos and aquariums attract men and women more evenly than do museums and other related cultural institutions.

Table 5: Demographics – Gender & Age

	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	MUSEUM & RELATED CULTURAL INSTITUTION ENTHUSIASTS
Adults 18+	*14.0 million*	*2.7 million*
Men	48%	44%
Women	52%	56%
18 - 34 years	33%	30%
35 - 44 years	24%	26%
45 - 54 years	19%	20%
55 - 64 years	12%	14%
65+ years	13%	10%
Average Age	43.4 years	43.2 years

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

Domestic museum and related cultural institution patrons are very similar to the total market for all leisure tourism experiences over the past couple of years in terms of age. Like travellers as a whole, 1-in-3 are between the ages of 18 and 34 years, 1-in-4 are between 35 and 44 years and a further 1-in-5 are between 45 and 54 years. Older museum/ related Cultural Institution patrons represent about one-fifth of this market. The market segment's average age is the same as the average for domestic leisure tourists in total – 43 years.

Not surprisingly, those who go to children's museums are somewhat younger than is the museum and related cultural institution segment as a whole. These museum patrons are more heavily concentrated in the "family" age group (35 – 44 years) and have an average age of 40 years.

Museum & Related Cultural Institution Tourism Enthusiasts span the income and education spectrums. They are slightly less likely to fall into the lowest income and education groups than are Canadian travellers as a whole. Consequently, their average household income, at $58,200 (Cnd$) is marginally higher than the average Canadian traveller's at $54,900 (Cnd$).

Table 6: Demographics – Income & Education

	Recent Leisure Travellers in Canada	
	Total	Museum & Related Cultural Institution Enthusiasts
Adults 18+	*14.0 million*	*2.7 million*
Household Income (Cnd$)		
Under $40,000	39%	31%
$40,000 - $59,999	26%	29%
$60,000 - $99,999	25%	29%
$100,000 or more	11%	11%
Average	$54,900	$58,200
Education		
Some Secondary or Less	14%	8%
Completed Secondary	26%	22%
Some Post Secondary	39%	44%
Graduated University	21%	27%

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

While they are no more likely to have high incomes – $100,000 or more – than the average traveller (11% each), they are noticeably more likely to have some post secondary (44%) or university education (27%) than is the travelling public in general (39% and 21% respectively).

Most Museum & Related Cultural Institution Tourism Enthusiasts live in adult-only households – those with no members under the age of eighteen. Nonetheless, close to 4-in-10 might be in the market for exhibitions and experiences that take into account the interests and needs of teenagers or children (38%) and almost 3-in-10 might seek content appropriate for children who are twelve years of age or under (29%).

The proportion of these enthusiasts who were born outside Canada (18%) 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	Museum & Related Cultural Institution Enthusiasts
Adults 18+	*14.0 million*	*2.7 million*
Adult Only	65%	62%
Any Teens/Children	35%	38%
Any Children under 12	26%	29%

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

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

Table 8: Demographics – Place of Birth

	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	MUSEUM & RELATED CULTURAL INSTITUTION ENTHUSIASTS
Adults 18+	*14.0 million*	*2.7 million*
Born In Canada	85%	82%
Born Outside Canada	15%	18%

Source: Special TAMS Tabulations, pages 7; 32.

5.3. Other Travel Activities

5.3.1. Other Cultural Activities

Table 9: Heritage/Festival/Visual Arts Activities

	MUSEUM & RELATED CULTURAL INSTITUTION ENTHUSIASTS
Adults 18+	*2.7 million*
Local arts & crafts studios	68%
Farmers' fairs or markets	53%
Local festivals or fairs	48%
Historic sites	36%
Historical replicas of cities/towns	36%
Pick your own farms / harvesting	31%
French Canadian cultural experiences	21%
Western theme events	12%
Aboriginal cultural experiences in remote or rural setting	11%
Carnivals such as Caribbana/ Mardi Gras or Rio's Carnival	7%
International film festivals	5%
Pow Wow/ other Aboriginal celebrations	5%

Source: Special TAMS Tabulations, page s 10-1/4

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

Other activities sought on trips by about 1-in-3 members of this market sector include historic sites, replicas of cities or towns, and harvesting or "pick-your-own" farm experiences. About 1-in-5 go to French Canadian cultural activities on their travels.

Participation rates in individual activities associated with **heritage, festivals** and **visual arts** by Museum & Related Cultural Institution Tourism Enthusiasts are two to three times *higher* than those evident for Canadian travellers as a whole.

Table 10: Performing Arts /Wine & Culinary Activities

	MUSEUM & RELATED CULTURAL INSTITUTION ENTHUSIASTS
Adults 18+	*2.7 million*
PERFORMING ARTS	
Theatre	49%
Classical music concerts	22%
Theatre festivals	20%
Music festivals	19%
Ballet or other dance	17%
Jazz music concerts	15%
Opera	13%
Literary festivals	10%
Musical attractions such as Jazzland	5%
WINE/CULINARY	
Internationally acclaimed restaurants	34%
Winery touring	23%

Source: Special TAMS Tabulations, page s 10-1/2

Similarly, there is an appreciably higher level of participation in many performing arts and wine/culinary activities among Canadian tourists in the museum and related cultural institution segment than is evident for Canadian travellers as a whole. For example, going to live theatre performances while on trips is popular among 1-in-2 members of the museum and related cultural institution segment (49%). About one-fifth of these tourists also go to classical music concerts, theatre and music festivals. Slightly fewer go to dance performances while on their trips.

One-third of Museum & Related Cultural Institution 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 museums and related cultural institutions might benefit from co-packaging with these experiences to lure the museum and related cultural institution crowd.

5.3.2. Outdoor Activities

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

	MUSEUM & RELATED CULTURAL INSTITUTION ENTHUSIASTS
Adults 18+	*2.7 million*
Hiking/backpacking in wilderness settings	43%
Cycling	30%
Kayaking or canoeing	28%
Motor boating	25%
Downhill skiing	21%
Cross-county skiing	18%
Horseback riding	14%
Sailing	11%
Snowmobiling	6%
Snowboarding	5%
Wind surfing	3%
Motorcycling	3%
Hot air ballooning	1%

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 Museum & Related Cultural Institution Tourism Enthusiasts (43%). About 3-in-10 of these museum and related cultural institution seekers also claim to go cycling, kayaking or canoeing while on trips, one-quarter go motor boating and about one-fifth go downhill skiing.

"Gentler" encounters with the outdoors – activities such as such as wildlife (56%) and wildflower viewing (44%) – also attract about half of these tourists. Golfing and/or fishing attract about 3-in-10 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

	MUSEUM & RELATED CULTURAL INSTITUTION ENTHUSIASTS
Adults 18+	*2.7 million*
Wildlife viewing	56%
Wildflowers / flora viewing	44%
Golfing	30%
Fishing	30%
Whale watching	27%
Bird watching	26%
Seeing northern lights/ other artic experiences	11%

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

5.3.3. Activities At Home

Table 13: Frequent/Occasional Activities At Home

	Recent Leisure Travellers in Canada	
	Total	Museum & Related Cultural Institution Enthusiasts
Adults 18+	*14.0 million*	*2.7 million*
Museum	39%	66%
Zoo/botanical garden	38%	62%
Live theatre	43%	61%
Music concerts	47%	59%
Art gallery/art show	32%	58%
Ballet	9%	18%
Opera	9%	15%
Casino	15%	14%

Source: Special TAMS Tabulations, pages 20; 38.

Not only do many Museum & Related Cultural Institution Tourism Enthusiasts go to museums, zoos and botanical gardens when *on trips*, but at least 6-in-10 of them also visit these types of institutions on a frequent or occasional basis in their *home* communities. They visit these institutions, along with live theatre performances, concerts, and art galleries/art shows at *home* at appreciably higher rates than does the "typical" Canadian traveller.

While less popular as activities to engage in within their local communities, Museum & Related Cultural Institution Tourism Enthusiasts also go to ballet and opera at about twice the rate as do Canadian travellers at large.

These findings suggest that *local* cultural events and institutions including theatres, other performance venues, museums and art galleries, along with zoos and botanical gardens may prove to be very **useful communication routes** for reaching potential museum and related cultural institution tourists with messages about culture-oriented travel opportunities in *other* parts of Canada.

5.4. Ratings of Canada

Museum & Related Cultural Institution 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 Museum & Related Cultural Institution 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 for fishing;
- A great place to relax and get away from it all;
- One of the best summer destinations.

They also rate Canada favourably for being a good *hunting* destination, being *safe*, having *friendly people*, for being *clean and well cared for*, having tourism activities for *mature* and for *young adults*, as a place to experience *adventure and excitement*, and for offering many *cultural events and attractions*.

Less favourable ratings are accorded attributes associated with *shopping opportunities*, as a place to *experience city life* or to experience *different cultures and ways of life* including *Aboriginal culture*, for *respecting the natural environment*, as a *winter destination*, as a place for *romance*, *value for money* and for experiencing *the "good life"*. Canadians in the Museum & Related Cultural Institution Tourism Enthusiast segment are least positive about their country 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. This attitudinal similarity with the *average* Canadian traveller is consistent with the strong demographic resemblances between the typical Canadian tourist and the Museum & Related Cultural Institution Tourism Enthusiast described in the demographic sections of this report.

Table 14: Attitudes Toward Canada

	Recent Leisure Travellers in Canada		
	Total	Museum & Related Cultural Institution Enthusiasts	
Adults 18+	*14.0 million*	*2.7 million*	
	Average (#)	Average (#)	Can't Rate (%)
Beautiful scenery	9.1	9.2	*
One of best destinations for outdoor activities	8.7	8.8	4%
Lots for families	8.6	8.7	3%
Great place for fishing	8.5	8.6	21%
Great place to relax	8.6	8.6	2%
One of best summer destinations	8.4	8.5	2%
Great place for hunting	8.3	8.4	34%
Lots for mature adults	8.5	8.4	6%
Safe for visitors	8.3	8.3	3%
Place with friendly people	8.2	8.3	2%
Clean/well cared for	8.3	8.2	2%
Lots for young adults	8.1	8.2	9%
Great place to experience adventure & excitement	8.1	8.2	8%
Many cultural events & attractions	8.0	8.1	3%
Great place to see historic sites	8.0	8.1	3%
Place with interesting shops	7.8	7.9	6%
Great place to experience different cultures	7.7	7.8	7%
Respects natural environment	7.7	7.8	4%
Great place to experience city life	7.7	7.7	5%
Great place for Aboriginal culture	7.5	7.7	15%
One of best winter destinations	7.5	7.6	4%
Great place to experience "good life"	7.4	7.5	9%
Place for romance	7.4	7.5	13%
Offers excellent value for money	7.1	7.3	5%
Popular, trendy place	6.8	6.9	12%

*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 Museum & Related Cultural Institution Tourism Enthusiasts with their messages:

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

Table 15: Print Media Read Regularly

	MUSEUM & RELATED CULTURAL INSTITUTION ENTHUSIASTS
Adults 18+	*2.7 million*
DAILY NEWSPAPER (ANY)	**86%**
Weekday edition	75%
Travel section of weekday edition	51%
Weekend edition	77%
Travel section of weekend edition	59%
Community newspapers	83%
ANY MAGAZINES	**91%**
News magazines	56%
Fashion/homemaking magazines	43%
Hobby magazines	42%
Canadian or National Geographic	40%
Travel magazines	39%
General interest/city life magazines	27%
Sports magazines	20%

Source: Special TAMS Tabulations, page 15.

Canadians in this market segment are avid local newspaper readers (86%). Furthermore, half of them claim to read the travel section of weekday editions of daily newspapers on a regular basis and about three-fifths claim to read or look through the travel section of the weekend editions of a local newspaper.

They are also avid magazine readers (91%). News magazines, fashion and hobby magazines, followed closely by travel magazines and Canadian or National Geographic, capture the most widespread regular readership.

Table 16: Television Programs Viewed Regularly

	MUSEUM & RELATED CULTURAL INSTITUTION ENTHUSIASTS
Adults 18+	*2.7 million*
Movies	72%
Nature shows	68%
Evening drama	61%
News magazine shows	59%
Evening sitcoms	59%
Early evening news	57%
Instructional/hobby shows	57%
Late evening news	54%
Professional sports	47%
Morning news	30%
Daytime programs on weekdays	22%

Source: Special TAMS Tabulations, page 17.

Compared to the *average* Canadian tourist, those in the museum and related cultural institution market are particularly likely to read the following publications:

- Travel sections of weekday/ weekend editions of daily newspapers;
- Travel magazines and Canadian Geographic;
- News magazines.

Daily and weekend newspapers may have better reach among these enthusiasts than does any particular type of television programming. Almost three-quarters of these tourists say they watch televised movies on a regular basis and approximately two-thirds claim to watch nature shows. About three-fifths say they view evening dramas, news magazine shows, evening sitcoms, early evening news and instructional/hobby shows regularly.

Even though many Museum & Related Cultural Institution 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

	MUSEUM & RELATED CULTURAL INSTITUTION ENTHUSIASTS
Adults 18+	*2.7 million*
Auto club	41%
Sports club	28%
Nature organization	13%
Art gallery/museum	11%
Zoo/botanical garden	5%
Gardening club	3%

Source: Special TAMS Tabulations, page 18.

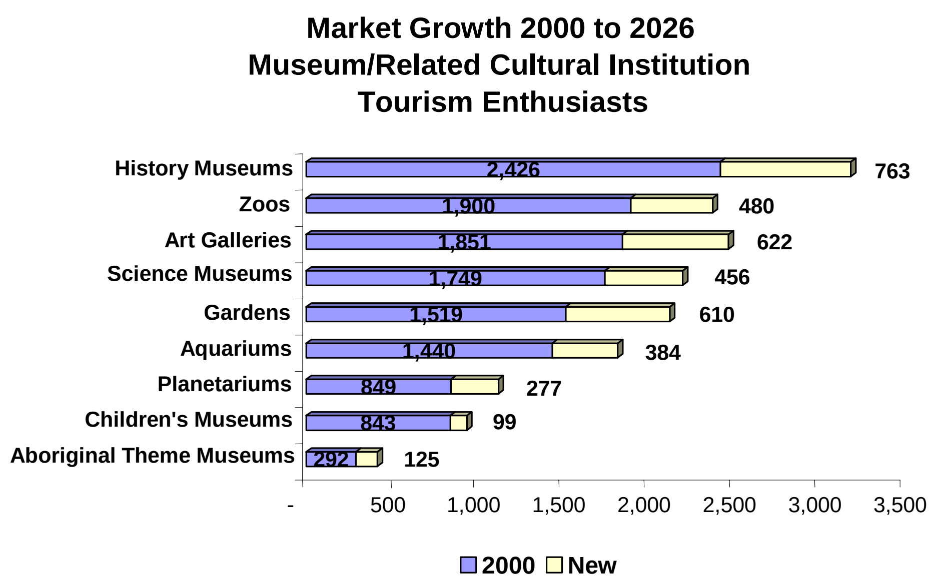
6. Projections to 2026

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 Museum & Related Cultural Institution Tourism Enthusiast market is also expected to increase over time, from 2.7 million to 3.5 million by 2026. At a rate of 29%, this growth is slightly higher than the national average. Each of the subsets within this tourism market are expected to increase in size over the next two decades at about the same rate as the adult population as a whole:

Museum Tourism Enthusiasts... From 2.66 million to 3.42 million

Related Cultural Institution Tourism Enthusiasts .... From 1.12 million to 2.21 million

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, museums and related cultural institutions 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 recent trips in Canada.
Source: TAMS, 2000.

For example, it is expected that the market for children's museums within the Museum & Related Cultural Institution Tourism Enthusiast market will grow at only 12%. This growth rate is well below the national average of 27%, likely because children's museums have special appeal to the family market – a demographic segment that will represent a diminishing share of Canadians as the population ages over the next two decades. Likely because they appeal to both the younger and older ends of the age spectrum, zoos can expect the domestic tourist market to grow . . . but to grow at a rate that is marginally lower than the population of Canada.

[11] See Footnote #4.

In contrast, two activities that tend to attract older consumers at a particularly high rate – botanical gardens and Aboriginal-themed museums – are expected to increase in tourism market demand, growing at rates well above the national average (40% growth rate for gardens; 43% for Aboriginal-themed museums).

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

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 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 *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
Museums/Related Cultural Institutions Enthusiasts	858
Museum Tourism Enthusiasts	831
Related Cultural Institution Tourism Enthusiasts	505
Festival Enthusiasts	498
Arts Festival Enthusiasts	184
Themed Community Festival Enthusiasts	178
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	2.6
Quebec	1.6
Ontario	1.4
Manitoba/Saskatchewan	2.3
Alberta	2.9
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 is 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%.

7.5. 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]

7.6. 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.

7.6.1. Gender & Age

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

- The 18 to 34 year old age group will decline 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.

7.6.2. 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.

7.6.3. 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.

7.6.4. 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.

7.7. 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.

7.8. 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