

# THE CANADIAN MARKET FOR ABORIGINAL CULTURAL EXPERIENCES IN ALBERTA



TAMS



A SPECIAL ANALYSIS OF THE 2006 TRAVEL ACTIVITIES AND MOTIVATION SURVEY

# **The Canadian Market for Aboriginal Culture Tourism Experiences in Alberta**

A Special Analysis of the  
2006 Travel Activities and Motivation Survey (TAMS)

Presented to

**Alberta Tourism, Parks, Recreation and Culture**

Presented by

**Research Resolutions  
& Consulting Ltd.**



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## I. Introduction

### A. Background and Objectives

Visitors engage in tourism activities based on their personal interests and requirements, selecting from the many and varied types of experiences offered at their destinations. They can be grouped into market segments or *activity-based* sectors, reflecting the experiences they seek when they travel – to Alberta or elsewhere.

Whether in its cities, towns or countryside, Alberta clearly offers a wide array of tourism experiences and attracts tourists from many different sectors. By learning more about Canadians who are in the market for some of these travel experiences, Alberta's tourism businesses can more effectively target their products and marketing efforts to attract tourists.

To support these efforts, *Alberta Tourism, Parks, Recreation and Culture* (ATPRC) selected the following array of activity-based sectors as the focus of a series of Canadian tourist profiles based on the 2006 Travel Activities and Motivation Survey (TAMS).<sup>1</sup>

- Cultural Tourists
- Fairs & Festivals Tourists
- Hikers, Climbers & Paddlers
- Archaeological & Palaeontological Tourists
- Aboriginal Culture Tourists

ATPRC commissioned Research Resolutions & Consulting Ltd. to prepare the Canadian tourist profiles. This profile describes **Aboriginal Culture Tourists**.

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<sup>1</sup> See Appendix A for a brief description of the TAMS study.

## B. Defining Canadian Aboriginal Culture Tourists

This report provides information about **Canadian Aboriginal Culture Tourists**. The sector is defined to include Canadian adults (18 years of age or over) who claim to have taken an overnight pleasure trip to any destination in the past two years and indicate that at least one of the following activities was the *main reason* for at least one of the overnight trips they took during this time period.<sup>2</sup>

- Aboriginal cultural experiences in a remote or rural setting for one or more nights;
- Aboriginal heritage attractions;
- Aboriginal festivals and events;
- Aboriginal cuisine;
- Aboriginal arts and crafts shows; and/or
- Aboriginal outdoor adventure and/or sports.

Reflecting the realities of the Canadian marketplace and the need for different promotional and marketing strategies for Canadians who reside in or near Alberta and those who live further away, Canadian Aboriginal Culture Tourists are divided into two distinct groups:

- **Regional Canadian Market** – sector members who reside in British Columbia, Alberta, Saskatchewan and Manitoba;
- **Long-Haul Canadian Market** – sector members who reside in Ontario, Québec, and the four Atlantic provinces.<sup>3</sup>

Because there is so much overlap between *all* Regional Canadian Aboriginal Culture Tourists and those who have travelled within or to Alberta over the past decade, findings are essentially the same between the two groups. For this reason, information in the pages that follow is provided for the Regional Canadian market, in total.

<sup>2</sup> Since fieldwork for the TAMS study was conducted between January and June 2006, the “past two years” likely refers to 2004 and 2005. It is important to note, however, that when asked to report travel activities over a two-year period, consumers are prone to imprecision by focussing on “salient trips” (most memorable, most expensive, etc.) and/or by “telescoping” the specified time period (extending the time frame over which trips are reported beyond the specified two years). In light of this potential imprecision, a liberal interpretation of the “reference period” is advised. Throughout this report, the terms “past two years or so” and “recent” are commonly used to describe the “past two year” recall period. Similarly, the “past ten years” criterion for Alberta travellers/non-travellers should also be interpreted liberally.

<sup>3</sup> The TAMS Canada study was not conducted among residents of Canada’s territories.

### Note to Readers

Activities and locations visited are *independent* of one another.

In other words, Canadian Aboriginal Culture Tourists claim to have taken an overnight trip motivated by Aboriginal cultural experiences in a remote or rural setting for one or more nights, heritage attractions, festivals and events such as pow wows, Aboriginal cuisine, Aboriginal arts and crafts shows or Aboriginal outdoor adventure and/or sports in the past two years or so and to have taken overnight pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited. Thus, Aboriginal Culture Tourists may or may not have been at an Aboriginal event or attraction in a particular country, province or state they have visited recently for an overnight pleasure trip.

There is less overlap between sector members in total and those who have travelled to Alberta for any purpose over the past decade (*Travellers to Alberta*) in the Long-Haul Canadian market. Thus, throughout the report, information is provided on Long-Haul Canadian Aboriginal Culture Tourists in total, those who have travelled to Alberta for any purpose over the past decade (*Travellers to Alberta*) and those within the sector who have not (*Non-Alberta Travellers*). The reader is cautioned to interpret findings for Travellers to Alberta with care because of the comparatively small sample size.

## II. Executive Summary

### **CANADIAN ABORIGINAL CULTURE TOURISTS ARE A NICHE MARKET.**

*Regional Canadian Aboriginal Culture Tourists* – those who took overnight trips in the past two years primarily motivated by Aboriginal cultural experiences in a remote or rural setting for one or more nights, Aboriginal heritage attractions, festivals and events such as pow wows, cuisine, arts and crafts shows or outdoor adventure and/or sports and live in British Columbia, Alberta, Saskatchewan or Manitoba – represent approximately 189,000 Canadian adults, or about three percent of the regional pleasure travel market. Of these Regional Canadian Aboriginal Culture Tourists, 148,000 (78%) claim to have been to Alberta over the past decade.

At 375,000 Canadians, the *Long-Haul Canadian Aboriginal Culture Tourist* market is substantially larger than the Regional Canadian sector but represents the same percentage of the pleasure travel market residing in Ontario, Québec and the four Atlantic provinces (3%). Approximately 1-in-4 Long-Haul Canadian Aboriginal Culture Tourists have taken a trip to Alberta over the past decade (104,000).

### **ALBERTA ATTRACTS CANADIAN ABORIGINAL CULTURE TOURISTS AT THE SAME RATE AS IT ATTRACTS TYPICAL TOURISTS.**

Regional Canadian Aboriginal Culture Tourists have travelled within or to Alberta over the past decade at the same rate that would be expected, given their share of western Canada's total pleasure travel market. Of the 6.2 million Canadian adults in the Regional overnight pleasure travel market, 4.5 million (73%) claim to have travelled within or to Alberta over a ten-year period. As noted above, the proportion of Regional Canadian Aboriginal Culture Tourists with Alberta travel experience is about the same (78%).

Correspondingly, over a ten-year period, Alberta attracted 2.8 million of the 13.5 million pleasure travellers from eastern Canada (21%) and attracted 104,000 of the 375,000 Canadian Aboriginal Culture Tourists residing in eastern Canada (28%).

## **ABORIGINAL HERITAGE ATTRACTIONS AND EXPERIENCES IN RURAL SETTINGS ARE ESPECIALLY POPULAR.**

Of the various activities that define the sector, visits to **Aboriginal heritage attractions** (e.g., museums, interpretive centres) are the most popular for Regional (49%) and Long-Haul Canadian Aboriginal Culture Tourists (50%). Aboriginal **cultural experiences in a remote or rural setting** for one or more nights is equally popular within the Regional Canadian market (45%) but is not as commonly cited as a main reason for travelling among Long-Haul Canadian Aboriginal Culture Tourists (34%). Regardless of where in Canada they live, about 1-in-3 Canadian Aboriginal Culture Tourists say they took a trip motivated by **Aboriginal festivals/events** and slightly fewer took a trip to go to an **Aboriginal arts and crafts show**.

Sampling **Aboriginal cuisine** is more widespread as a trip motivator among Regional Canadian Aboriginal Culture Tourists (25%) than among those in the Long-Haul Canadian market (17%). Similarly, though at a lower level, taking a trip primarily to engage in **Aboriginal outdoor adventure or sports** is more characteristic of members of the Regional Canadian market (11%) than of the Long-Haul Canadian segment (6%).

## **CANADIAN ABORIGINAL CULTURE TOURISTS LIVE IN ALL PARTS OF CANADA.**

Although they live in each of the four western provinces, compared to their share of the region's total adult population (34%), Alberta's residents are somewhat under-represented among Aboriginal culture enthusiasts (29%). Conversely, residents of British Columbia are substantively over-represented among Canadian Aboriginal Culture Tourists (53%). In fact, one-third of Regional Canadian sector members are residents of Vancouver, suggesting that this city may be a particularly fertile market for Canadians seeking Aboriginal tourism experiences.

Similarly, among Long-Haul Canadian Aboriginal Culture Tourists, Ontarians are somewhat over-represented, Atlantic Canadians are somewhat under-represented and Quebeckers are at close to parity with their share of the Long-Haul Canadian market's population. Specifically, Ontario adults account for approximately two-thirds of the eastern Canadian sector (64%), with a high concentration in Toronto (27%). Almost 1-in-3 Long-Haul Canadian Aboriginal Culture Tourists are Quebeckers.

Compared to their contributions to the sector as a whole, Canadian Aboriginal Culture Tourists from eastern Canada who have been to Alberta over the past

decade are substantively over-represented in Ontario (78%) and substantively under-represented among Québec travellers (16%).

#### **THEY SPAN THE AGE CONTINUUM.**

All age groups are represented in the Regional and Long-Haul Canadian market sectors. The Regional Canadian market is more heavily concentrated among western Canadians between 25 and 44 years (51%), while the Long-Haul Canadian market is concentrated among middle-aged or older Canadians (45 years of age or over, 50%).

Canadian Aboriginal Culture Tourists from western Canada are somewhat more likely to be men than women, whereas the reverse is true of sector members from eastern Canada.

#### **INCOME LEVELS DIFFER BETWEEN EAST AND WEST.**

Although they span various income, occupational status and education levels, Long-Haul Canadian Aboriginal Culture Tourists are generally *less* affluent than are those who live west of Ontario. Over two-fifths of the Regional Canadian market's members claim to have annual household incomes of at least \$100,000 (41%) – a proportion much higher than that found in the Long-Haul Canadian sector (23%). This discrepancy may be associated with the different age profiles of the two groups. Compared to their Regional Canadian counterparts, Long-Haul Canadian Aboriginal Culture Tourists are *younger*, and therefore at the early stages of their careers; or *older*, and therefore more apt to be on fixed retirement incomes.

Irrespective of whether they live in eastern or western Canada, over one-third of Canadian Aboriginal Culture Tourists are university educated.

#### **MANY ARE INTERNATIONAL TRAVELLERS.**

Aboriginal Culture Tourists in the Regional and Long-Haul Canadian markets exhibit similar travel patterns. Almost all of them have travelled within Canada and over one-third claim to have taken *all* of their overnight pleasure trips in the past two years *within* Canada. More than two-fifths of them have taken holidays in the U.S. and/or other foreign countries. Mexico and the Caribbean are the most popular offshore destinations among Regional Canadian Aboriginal Culture Tourists, whereas Europe is the favoured destination among Long-Haul Canadian Aboriginal Culture Tourists.

**BRITISH COLUMBIA AND ONTARIO ARE ALBERTA'S MAIN CANADIAN COMPETITORS FOR REGIONAL CANADIAN ABORIGINAL CULTURE TOURISTS.**

Setting aside travel by each province's residents *within* their own province, Alberta (33%) is slightly ahead of British Columbia (27%) and Ontario (26%) in attracting Canadian Aboriginal Culture Tourists from other provinces in the Regional Canadian market. In this context, Saskatchewan has been an overnight pleasure trip destination in the past two years for 1-in-5 Regional Canadian Aboriginal Culture Tourists whereas Québec has attracted about 1-in-6.

**QUEBEC AND ATLANTIC CANADA ARE COMPETITORS FOR THE LONG-HAUL CANADIAN MARKET.**

Apart from travel by each province's residents *within* their own province, Québec (24%) and Atlantic Canada (18%) have attracted more Canadian Aboriginal Culture Tourists from other eastern provinces than have Alberta (12%), British Columbia (16%) or Ontario (10%).

**ALBERTA FACES COMPETITION FOR CANADIAN ABORIGINAL CULTURE TOURISTS FROM U.S. BORDER AND SUN/SEA STATES.**

U.S. travel destinations for Regional and Long-Haul Canadian Aboriginal Culture Tourists tend to be those that are at or near the Canada/U.S. border or those that offer a respite from the Canadian winter. While it is unlikely that sector members are visiting these states to pursue their interests in Aboriginal culture, the most popular destinations for the Regional Canadian market include California, Washington, and Montana. On the eastern side of the country, Canadian Aboriginal Culture Tourists are most commonly drawn to New York, followed by Florida, Michigan, Massachusetts and Maine.

**DESTINATION IS LESS IMPORTANT TO REGIONAL THAN TO LONG-HAUL CANADIAN SECTOR MEMBERS.**

Canadian Aboriginal Culture Tourists in the Regional Canadian market are almost evenly divided among *destination, activities* and *vacation experience* as their first consideration in planning a summer or winter trip. In contrast, most sector members from eastern Canada initially focus on *destination* when starting to plan a trip. Correspondingly, fewer than half of Regional Canadian Aboriginal Culture Tourists say that destination *per se* is extremely or very important to them, but two-thirds of Long-Haul Canadian Aboriginal Culture Tourists put a premium on *destination*.

**A SAFE DESTINATION IS A PRIORITY.**

The characteristics identified as most important to Canadian Aboriginal Culture Tourists when selecting a destination include *safety*, having *many things for adults to see and do*, posing *no health concerns*, and, especially among Long-Haul Canadian Aboriginal Culture Tourists, offering *convenient access by car*. Members of the Long-Haul Canadian market also put more emphasis on the availability of *mid-range* and/or *budget accommodation* than do those in the Regional Canadian market.

**ALBERTA FACES AN IMAGE BUILDING CHALLENGE.**

At 7.5 on a ten-point *appeal as a destination* scale among Long-Haul Canadian Aboriginal Culture Tourists, Alberta faces *image-building* challenges. This score is significantly below market leaders such as neighbouring British Columbia (8.7), Ontario (8.2) or Hawaii (8.3). Even among Long-Haul Canadian sector members who have travelled to Alberta over the past ten years, the province's image rating (8.3) is appreciably lower than British Columbia's (9.2).

Within the Regional Canadian market Alberta's image rating, at 7.8 on a ten-point *appeal as a destination* scale, also falls well below British Columbia's (9.2), possibly reflecting the dominance of British Columbia residents within the Regional Canadian Aboriginal Culture Tourist market.

**CANADIAN ABORIGINAL CULTURE TOURISTS ARE ALSO OUTDOOR ENTHUSIASTS.**

The *outdoor* activity profile of Regional Canadian Aboriginal Culture Tourists suggests travellers who are campers, visitors to nature parks and natural wonders, and viewers of flora and fauna. Long-Haul Canadian Aboriginal Culture Tourists are about as enthusiastic about a wide range of outdoor activities as are their counterparts in western Canada, although they are somewhat less likely to visit nature parks and more likely to take day hikes and to fish. Like their neighbours in western Canada, they are also inclined to take holidays in order to sunbathe or sit on a beach.

The types of outdoor experiences of interest to Canadian Aboriginal Culture Tourists are widely available in Alberta and highly consistent with Aboriginal cultural experiences in remote or rural settings and/or Aboriginal outdoor adventures. They also provide sector members with the two benefits of pleasure travel they are most apt to seek: *relaxation* and a *break from the day-to-day environment*.

**SOME PLEASURE TRIPS ARE DRIVEN BY CULTURAL AND ENTERTAINMENT EXPERIENCES.**

Whether they live in eastern or western Canada, one-fifth to one-third of Canadian Aboriginal Culture Tourists take pleasure trips primarily to engage in various cultural and entertainment pursuits, including seeing historic sites, monuments and buildings; strolling around cities to see architecture; and going to museums, cultural performances and/or art galleries. They also take trips in order to go to spectator sporting events, farmers' markets or country fairs, exhibitions or fairs, and free outdoor performances.

Shopping and dining are not trip *drivers* for most Canadian Aboriginal Culture Tourists but are almost universal trip activities for them. Thus, Regional and Long-Haul Canadian Aboriginal Culture Tourists may require assurances that they will have opportunities to shop, eat in restaurants using local ingredients or that offer Aboriginal cuisine, and sit at outdoor cafes while on an Alberta-bound trip.

**PACKAGE THE "OUTDOORS" WITH ABORIGINAL CULTURE EXPERIENCES.**

Because of tourists' wide variety of interests, many options are available for packaging Alberta's Aboriginal culture experiences with other activities to increase the lure of Alberta. Whether in western or eastern Canada, however, emphasis on other *outdoor* activities such as camping, hiking or viewing wildlife in Alberta's national and provincial nature parks or going to Head-Smashed-In Buffalo Jump may be more successful than a focus on other *cultural* and/or *urban* activities such as a visit to the Calgary Stampede Indian Village.

Outdoor-focussed Aboriginal culture *packages* may be particularly appealing to Regional Canadian Aboriginal Culture Tourists since they are especially likely to purchase packages including transportation to the destination and lodging for their recent pleasure trips. Their package purchases may, however, be associated with their trips to Mexico and/or the Caribbean rather than with trips in Canada.

Self-directed overnight tours that incorporate outdoor and Aboriginal culture experiences might be particularly attractive to the Long-Haul Canadian Aboriginal Culture Tourist market since these eastern Canadians tend to take self-directed overnight touring trips and express an interest in travelling by car.

## **THE INTERNET IS AN IMPORTANT TRIP PLANNING TOOL FOR ABORIGINAL CULTURE TOURISTS.**

Two-thirds of Regional Canadian Aboriginal Culture Tourists use the internet as a source of trip planning information and over half of their Long-Haul counterparts do so. Other popular information sources include advice of friends and relatives, the tourist's past experience at a destination, maps and travel agents.

About one-third of Regional Canadian sector members rely on official travel guides or brochures from provincial, state or national organizations; visitor information centres; and/or auto clubs as sources of information about potential travel destinations.

The same sources are commonly used by Long-Haul Canadian Aboriginal Culture Tourists although somewhat more of these travellers utilize newspaper articles and travel information received in the mail than do their western counterparts. They are also comparatively unlikely to look to an auto club or to maps for travel information.

## **VANCOUVER AND TORONTO ARE GOOD PROSPECTS FOR MARKETING ALBERTA'S ABORIGINAL CULTURE EXPERIENCES.**

Each of these metropolitan areas represents substantial numbers of Canadian Aboriginal Culture Tourists in their respective regions, making them logical targets for promoting these experiences. The challenge will be in convincing these tourists to seek Aboriginal experiences in *Alberta* instead of within their own province. To meet this challenge, promotional efforts might focus on integrating Aboriginal experiences with camping, nature parks, natural wonders such as the Canadian Badlands, wildlife viewing and other outdoor activities that would contribute to a stress-reducing, easy-going holiday.

### **III. Detailed Findings**

#### **A. Setting the Stage**

##### **1. Market Size – All Sectors**

###### **The Regional Canadian Market**

Tourism businesses in Alberta are competing for the attention of about 6.2 million Canadian adults who reside in provinces to the west of the Ontario-Manitoba border and claim to have taken at least one overnight pleasure or vacation trip over a two-year period (see Table 1). They represent the vast majority (84%) of the 7.3 million adults who live in British Columbia, Alberta, Saskatchewan and Manitoba.

Including residents of Alberta, almost 3-in-4 Canadians in the regional overnight pleasure travel market, or about 4.5 million tourists, have had *some* experience with Alberta destinations over the past decade. They may have been on a vacation, visiting friends and relatives or on a business trip to the province. Three-fifths of the potential Regional Canadian market claim to have travelled in Alberta in the past two years or so (3.7 million). Most of these recent tourists were on a pleasure or vacation trip (three million).

###### **Long-Haul Canadian Aboriginal Culture Tourists**

Alberta is also competing for the attention of about 13.5 million Canadian adults who reside in Ontario, Québec or one of the four Atlantic provinces and claim to have taken at least one overnight pleasure or vacation trip over a two-year period. These pleasure tourists represent the vast majority (78%) of the 17.4 million adults who live in the Canadian Long-Haul market.

About 1-in-5 Canadians in the long-haul overnight pleasure travel market, or about 2.8 million, have had *some* experience with Alberta destinations over the past decade. They may have been on a vacation, visiting friends and relatives or on a business trip to the province. One-tenth of the potential market claim to have travelled to Alberta in the past two years or so (1.3 million). Most of these recent tourists to Alberta were on a pleasure or vacation trip (937,000).

TABLE 1: OVERVIEW OF CANADIAN MARKET SIZE	Regional Market*		Long-Haul Market	
	<i>(British Columbia, Alberta, Saskatchewan, Manitoba)</i>		<i>(Ontario, Québec, Atlantic Provinces)</i>	
<i>Unweighted base</i>	<i>(11,879)</i>		<i>(19,820)</i>	
Total Adult Population**	7,341,000		17,435,000	
Pleasure Travellers Any Destination – Past 2 Years	6,197,000		13,543,000	
<b><u>Took Overnight Trips within/to Alberta</u></b>	#	%	#	%
Any purpose, past 10 years	4,546,000	73%	2,831,000	21%
Any purpose, past 2 years	3,702,000	60%	1,340,000	10%
Pleasure, past 2 years	3,041,000	49%	937,000	7%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 1. \*The Regional market includes Alberta residents travelling within their own province. \*\*Adults are residents 18 years of age or over.

## 2. Market Size – Aboriginal Culture Tourists

People who take a trip *in order to* engage in Aboriginal tourism experiences are a fraction of tourists who obtain Aboriginal cultural experiences in a remote or rural setting, go to Aboriginal heritage attractions, festivals and events such as pow wows, sample Aboriginal cuisine, go to Aboriginal arts and crafts shows or participate in Aboriginal outdoor adventure and/or sports while on their vacations. In fact, approximately 925,000 travellers in the Regional Canadian market and 1,320,000 in the Long-Haul Canadian market say they have participated in these types of events or participated in these types of activities on at least one of their trips over a two-year period (see Table 2).

Of these pleasure tourists, 189,000 Regional residents and 375,000 Long-Haul Canadian market residents claim that they took a trip *in order to* go to an Aboriginal attraction, event or site. Thus, the Regional Canadian market for Aboriginal Culture Tourists represents about 1-in-33 members of the travelling public in the four western provinces (3%) and the same proportion of Canadian pleasure travellers living east of the Ontario/Manitoba border (3%).

Almost all Aboriginal Culture Tourists in the Regional Canadian market have taken an overnight trip within Alberta over the past decade (*Travellers within/to Alberta*). At 148,000 these Regional Canadian Aboriginal Culture Tourists represent 78% of total Regional Canadian sector members. In contrast, about one-quarter (28%) of Long-Haul Canadian sector members are travellers to Alberta (104,000).

Aboriginal culture enthusiasts – those for whom Aboriginal cultural experiences, heritage attractions, festivals and events, cuisine, crafts or outdoor adventure and/or sports are main reason(s) for a trip – are the focus of this report because, as the “dedicated” or “passionate” market, they represent a crystallization of the interests and characteristics that might attract more casual participants to these activities.

TABLE 2: OVERVIEW OF ABORIGINAL CULTURE TOURISTS	Regional Canadian Pleasure Travellers*		Long-Haul Canadian Pleasure Travellers	
Unweighted base	(9,089)		(13,830)	
Weighted, Projected	6,197,000		13,543,000	
<b>Aboriginal Culture Activities on Trips</b>				
Any	925,000	15%	1,320,000	10%
Main reason for trip	189,000	3%	375,000	3%
Took overnight trip within/to Alberta any purpose, past 10 years	148,000	2%	104,000	1%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 3. “Canadian Pleasure Travellers” are those who claim to have taken a pleasure trip to any destination over the past two years. \*The Regional Canadian market includes Alberta residents travelling within their own province.

## **B. Market Profile: Canadian Aboriginal Culture Tourists**

### **1. Market Segments**

The sector is composed of pleasure tourists who indicated that one or more of the activities listed in Table 3 was the main reason for an overnight trip they took over a two-year period. Of the various activities, visits to **Aboriginal heritage attractions** (e.g., museums, interpretive centres) are the most popular for Regional (49%) and Long-Haul Canadian Aboriginal Culture Tourists (50%) (see Table 3). **Aboriginal cultural experiences in a remote or rural setting** for one or more nights is equally popular within the Regional Canadian market (45%) but is not as commonly cited as a main reason for travelling among Long-Haul Canadian Aboriginal Culture Tourists (34%)

Regardless of where in Canada they live, about 1-in-3 Canadian Aboriginal Culture Tourists say they took a trip motivated by **Aboriginal festivals/events** and slightly fewer took a trip to go to an **Aboriginal arts and crafts show**. Sampling **Aboriginal cuisine** is more widespread as a trip motivator among Regional Canadian Aboriginal Culture Tourists (25%) than among those in the Long-Haul Canadian market (17%). Similarly, though at a lower level, taking a trip primarily to engage in **Aboriginal outdoor adventure or sports** is more characteristic of members of the Regional Canadian market (11%) than of the Long-Haul segment (6%).

**TABLE 3: ABORIGINAL EXPERIENCES AS MAIN REASON(S) FOR OVERNIGHT TRIPS**

	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
Aboriginal heritage attractions (e.g., museums, interpretive centres)	49%	50%	56%	48%
Aboriginal cultural experiences in remote/ rural setting (1+ nights)	45%	34%	41%	31%
Aboriginal festivals and events (e.g., pow wows)	35%	31%	22%	35%
Aboriginal arts and crafts shows	29%	29%	14%	35%
Aboriginal cuisine (tasted or sampled)	25%	17%	20%	16%
Aboriginal outdoor adventure and/or sports	11%	6%	11%	4%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 2. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade. Figures add to more than 100% because of duplication among activity participants.

## 2. Regional and Demographic Characteristics

### a) Place of Residence

#### **Regional Canadian Aboriginal Culture Tourists**

Regional Canadian Aboriginal Culture Tourists live in all four western provinces (see Table 4). Compared to their share of the region's total adult population (34%), Alberta's residents are somewhat under-represented among these Aboriginal culture enthusiasts (29%).<sup>4</sup> Conversely, at 45% of the regional population, residents of British Columbia are substantively over-represented among Canadian Aboriginal Culture Tourists (53%). Commensurate with their respective shares of the region's population, Saskatchewan contributes one-tenth of Regional Canadian sector members and Manitoba contributes slightly fewer (8%).

Each major metropolitan area in the four provinces contributes to the pool of Regional Canadian Aboriginal Culture Tourists. As the region's largest city, Vancouver, is home to almost one-third of Regional Canadian sector members (32%). This proportion far exceeds Vancouver's share of the regional population (24%), suggesting that this city is a particularly fertile market for Aboriginal tourism experiences. At about 1-in-8 sector members, Calgary (12%) and Edmonton (11%) contribute Canadian Aboriginal Culture Tourists at the same rate as they contribute to the region's population. Winnipeg (5%), Victoria (3%), Regina (3%) and Saskatoon (2%) also contribute Canadian Aboriginal Culture Tourists on par with their respective shares of the region's adult population.

#### **Long-Haul Canadian Aboriginal Culture Tourists**

Long-Haul Canadian Aboriginal Culture Tourists are distributed across eastern Canadian provinces in a manner that closely approximates the adult population and the overnight pleasure travel market as a whole. There are, however, indications that Ontarians are over-represented and residents of Atlantic Canada are under-represented within this sector.<sup>5</sup> Specifically, Ontario adults account for 56% of the Long-Haul Canadian market's total population but represent 64% of Long-Haul Canadian Aboriginal Culture Tourists. In contrast, the Atlantic region represents eleven percent of the area's population but only six percent of Long-Haul Canadian Aboriginal Culture Tourists. At close to parity with their share of the Long-Haul Canadian market's population, almost 1-in-3 Long-Haul Canadian Aboriginal Culture Tourists are Quebeckers.

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<sup>4</sup> See Detailed Tables, Volume 1, Table 42 for the distribution of the Canadian adult and pleasure travel markets by province/region.

<sup>5</sup> The TAMS Canada data file does *not* include information on Atlantic Canadians' place of residence by province.

Each major metropolitan area in the region contributes Long-Haul Canadian Aboriginal Culture Tourists at rates that are generally consistent with the city's share of the region's population. Hence, Toronto (27%) is home to about one-quarter of these sector members and Montréal (18%) is home to just under one-fifth. Commensurate with their smaller contribution to the eastern Canadian adult population, cities such as Ottawa (3%), Québec City (2%) and Halifax (1%) contribute fewer Canadian Aboriginal Culture Tourists to the Long-Haul Canadian market.

Compared to their contributions to the sector as a whole, tourists from eastern Canada who have been to Alberta over the past decade appear to be over-represented in Ontario (78%) and under-represented among Québec residents (16%).

TABLE 4: PLACE OF RESIDENCE	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<b>British Columbia</b>	<b>53%</b>	-	-	-
Vancouver	32%	-	-	-
Victoria	3%	-	-	-
<b>Alberta</b>	<b>29%</b>	-	-	-
Calgary	12%	-	-	-
Edmonton	11%	-	-	-
<b>Saskatchewan</b>	<b>10%</b>	-	-	-
Regina	3%	-	-	-
Saskatoon	2%	-	-	-
<b>Manitoba</b>	<b>8%</b>	-	-	-
Winnipeg	5%	-	-	-
<b>Ontario</b>	-	<b>64%</b>	<b>78%</b>	<b>58%</b>
Toronto	-	27%	31%	26%
Ottawa	-	3%	3%	3%
<b>Québec</b>	-	<b>31%</b>	<b>16%</b>	<b>36%</b>
Montréal	-	18%	12%	21%
Québec City	-	2%	1%	2%
<b>Atlantic Canada</b>	-	<b>6%</b>	<b>6%</b>	<b>6%</b>
Halifax	-	1%	2%	*

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 42. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. \*Travellers to Alberta\* are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. \*Non-Alberta Travellers\* are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade. \*Less than 0.5%.

## **b) Personal and Household Characteristics**

### **Age, Gender, Household Composition**

#### **Regional Canadian Aboriginal Culture Tourists**

Regional Canadian Aboriginal Culture Tourists are concentrated in the 25 to 44 year age group (51%). Younger travellers contribute less than one-tenth of this market (18 to 24 years, 9%). About one-third of the market is between 45 and 64 years of age but older Regional residents (65 years or over), like those at the young end of the spectrum, represent less than one-tenth (see Table 5). Men are more likely to be Regional Canadian Aboriginal Culture Tourists (58%) than are women (42%).

Most Regional Canadian Aboriginal Culture Tourists live in households comprised of two adults (couples, 38%) or in families with children under 18 years of age (24%).

#### **Long-Haul Canadian Aboriginal Culture Tourists**

Long-Haul Canadian Aboriginal Culture Tourists are less heavily concentrated in the 25 to 44 year age group (34%) than are their Regional counterparts (51%). In fact, sector members in the Long-Haul Canadian market are quite evenly spread across age groups. Almost one-fifth fall into the youngest cohort (18%, 18 to 24 years), one-third are between 25 and 44 years, and approximately one-quarter are between 45 and 54 years. A slightly higher proportion are older travellers (27%, 55 years of age or over). Unlike their Regional counterparts, more women (55%) than men (45%) are Long-Haul Canadian Aboriginal Culture Tourists.

These tourists live in households comprised of two adults (couples, 30%), in families with children less than 18 years of age (15%) or live alone (12%).

The age, gender and household composition profile of Long-Haul Canadian Aboriginal Culture Tourists who have taken an overnight trip to Alberta in the past decade is similar to the sector as a whole.

TABLE 5: AGE, GENDER, HOUSEHOLD COMPOSITION

	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<b>Age</b>				
18 – 24 Years	9%	18%	13%	19%
25 – 34 Years	26%	21%	20%	21%
35 – 44 Years	25%	13%	16%	11%
45 – 54 Years	18%	23%	29%	20%
55 – 64 Years	14%	16%	15%	16%
65+ Years	9%	11%	7%	12%
<b>Gender</b>				
Men	58%	45%	45%	44%
Women	42%	55%	55%	56%
<b>Household Composition</b>				
Lives alone	16%	12%	15%	11%
Couples – no children	38%	30%	27%	31%
Families – children under 18 years	24%	15%	14%	16%
Families – all children 18+	8%	7%	3%	8%
All other	15%	36%	41%	34%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 40 and 41. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade.

## **Country of Birth, Education, Occupation, and Income**

### **Regional Canadian Aboriginal Culture Tourists**

Most Regional Canadian Aboriginal Culture Tourists who live in British Columbia, Alberta, Saskatchewan and Manitoba were born in Canada (see Table 6). They span the education spectrum with one-quarter having no more formal education than secondary school (25%) and almost two-fifths having at least one university degree (38%). This level of university education is noticeably higher than that found within the general travelling public (28%).<sup>6</sup>

Over two-fifths claim to have annual household incomes of at least \$100,000 (41%) – a proportion much higher than that found in the regional tourism market as a whole (27%). Like regional travellers in total, most continue to work in the labour force (65%), although about one-tenth have retired (9%).

### **Long-Haul Canadian Aboriginal Culture Tourists**

Fewer than 3-in-4 Long-Haul Canadian Aboriginal Culture Tourists were born in Canada (72%). At over one-quarter of the market (28%), new Canadians are noticeably more prevalent within this sector than they are within eastern Canada's travelling public as a whole (20%).

Long-Haul Canadian Aboriginal Culture Tourists parallel typical tourists in terms of their education, with about 1-in-3 having no more than a secondary school education (30%). Over one-third are university graduates (35%).

Possibly reflecting the fact that over one-quarter of the market is at least 55 years of age, fewer Long-Haul Canadian Aboriginal Culture Tourists are actively engaged in the labour force (58%) and more are retirees (16%) than is the case within the Regional Canadian market (Regional labour force participants, 65%; retirees, 9%).

Long-Haul Canadian Aboriginal Culture Tourists closely resemble typical travellers from eastern Canada with respect to income, although the sizeable proportions at the beginning of their earning years or those on fixed retirement incomes likely contribute to the high proportion of sector members with incomes under \$60,000 (50%). Less than one-quarter of Long-Haul Canadian Aboriginal Culture Tourists fall into the highest income bracket. At 23%, high income earners are much less prevalent within the Long-Haul Canadian market than within the Regional Canadian market for Aboriginal tourism experiences (41%).

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<sup>6</sup> See Detailed Tables, Volume 1, Tables 33 through 39 for figures.

Long-Haul Canadian Aboriginal Culture Tourists who have travel experience in Alberta are much more likely than all Long-Haul Canadian sector members to have incomes of at least \$100,000 (38%) and to be university educated (47%).

**TABLE 6: COUNTRY OF BIRTH, EDUCATION, LABOUR FORCE PARTICIPATION, INCOME**

	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<b>Country of Birth</b>				
Canada	77%	72%	74%	71%
Other	23%	28%	26%	29%
<b>Education</b>				
High school diploma or less	25%	30%	32%	30%
Some post-secondary	9%	10%	8%	10%
Post-secondary diploma or certificate	27%	24%	12%	29%
University degree+	38%	35%	47%	30%
<b>Labour Force Participant<sup>1</sup></b>				
Retirees	9%	16%	12%	18%
<b>Household Income</b>				
Under \$40,000	23%	30%	18%	35%
\$40,000 - \$59,999	10%	20%	18%	21%
\$60,000 - \$99,999	26%	27%	26%	27%
\$100,000+	41%	23%	38%	17%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 36 through 39. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade. <sup>1</sup>"Labour force participant" includes working full-time, part-time and self-employed.

### 3. Competitive Destinations

#### a) Worldwide Destinations for Overnight Pleasure Trips

##### Regional Canadian Aboriginal Culture Tourists

When asked to identify the destinations of overnight pleasure trips they took over a two-year period, most Regional Canadian Aboriginal Culture Tourists indicated that they have taken recent vacations within Canada (88%) and almost two-fifths claim to have travelled *only* within Canada (38%) (see Table 7).

Destinations for overnight pleasure trips in the past two years among these tourists include the U.S. (44%) and, as commonly, other countries (43%). Apart from the U.S., the most popular foreign destinations for Regional Canadian Aboriginal Culture Tourists are the Caribbean and Mexico.

##### Long-Haul Canadian Aboriginal Culture Tourists

Almost all Long-Haul Canadian Aboriginal Culture Tourists indicated that they have taken recent vacations within Canada (88%) and about one-third claim to have travelled *only* within Canada (34%).

Other destinations for overnight pleasure trips in the past two years among these tourists include the U.S. (47%) and other countries (42%). Apart from the U.S., the most popular foreign destinations for Long-Haul Canadian Aboriginal Culture Tourists are Europe, followed at an appreciable distance, by the Caribbean.

Sector members who have travelled to Alberta over the past decade are more avid travellers than are Long-Haul Canadian Aboriginal Culture Tourists in total. Not only have more of them travelled in Canada (96%) over the past two years, but also substantively higher proportions have gone to U.S. destinations (61%) and other foreign destinations (55%) than is the case for sector members in total.

##### Note to Readers

Activities and locations visited are *independent* of one another.

In other words, Canadian Aboriginal Culture Tourists claim to have taken an overnight trip motivated by Aboriginal cultural experiences in a remote or rural setting for one or more nights, heritage attractions, festivals and events such as pow wows, Aboriginal cuisine, Aboriginal arts and crafts shows or Aboriginal outdoor adventure and/or sports in the past two years or so and to have taken overnight pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited. Thus, Aboriginal Culture Tourists may or may not have been at an Aboriginal event or attraction in a particular country, province or state they have visited recently for an overnight pleasure trip.

TABLE 7: COMPETITIVE DESTINATIONS  
WORLDWIDE

	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
			Travellers to Alberta	Non-Alberta Travellers
	<b>Total</b>	<b>Total</b>		
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<b>Canada</b>	<b>88%</b>	<b>88%</b>	<b>96%</b>	<b>86%</b>
Canada only	38%	34%	20%	39%
<b>U.S.</b>	<b>44%</b>	<b>47%</b>	<b>61%</b>	<b>42%</b>
<b>Other Countries (NET)</b>	<b>43%</b>	<b>42%</b>	<b>55%</b>	<b>37%</b>
Caribbean	22%	14%	17%	13%
Mexico	20%	7%	11%	5%
Europe	13%	23%	30%	20%
Asia	13%	8%	13%	7%
Africa/ Australia/New Zealand	12%	7%	17%	3%
South/Central America	6%	6%	11%	4%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 47. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade.

## b) Canadian Destinations

### Regional Canadian Aboriginal Culture Tourists

Most Regional Canadian Aboriginal Culture Tourists have had some travel experience in Alberta over a ten-year period (79%) and over half (57%) have travelled to or within the province on an overnight pleasure trip in the past two years (see Table 8). About 3-in-10 members of the Regional Canadian market are Alberta residents travelling within their own province (29%).

When *intra-provincial* tourism activity is excluded, Alberta attracts about 1-in-3 Canadian Aboriginal Culture Tourists from the balance of the region (British Columbia, Saskatchewan and Manitoba). As noted earlier, however, these sector members may or may not have pursued an Aboriginal culture experience in Alberta or any other specific destination they claim to have visited recently.

British Columbia is also a popular destination among Regional Canadian Aboriginal Culture Tourists. It captures overnight pleasure trips from two-thirds of the market (68%). When British Columbia residents travelling within their own province are removed, this province is slightly less successful than Alberta in attracting *others* from the region (27%). Saskatchewan attracted 3-in-10 Canadian Aboriginal Culture Tourists for overnight pleasure trips in the past two years, followed by Ontario (26%).

### Long-Haul Canadian Aboriginal Culture Tourists

More than one-quarter of Long-Haul Canadian Aboriginal Culture Tourists have had some travel experience in Alberta over a ten-year period (28%) and one-eighth (12%) have been to the province on an overnight pleasure trip in the past two years. Not surprisingly, recent overnight pleasure travel experiences in Alberta are appreciably more common among those who have been to the province over the past decade (43%) than is the case in the sector as a whole (12%).

Recall that almost two-thirds of Long-Haul Canadian Aboriginal Culture Tourists *reside* in Ontario. Many of these Ontario residents travel within their own province and contribute to the dominance of Ontario as a pleasure travel destination among sector members (64%). When *intra-provincial* tourists are excluded, Ontario remains a recent destination for only 1-in-10 Canadian Aboriginal Culture Tourists from eastern Canada.

A similar pattern is evident for Québec. Including residents of the province, Québec has been a destination for close to half of eastern Canada's Aboriginal Culture Tourists (48%). Excluding Québec residents, the province has been a recent destination for one-quarter of these tourists (24%), making it a more favoured Canadian destination for

Long-Haul Canadian Aboriginal Culture Tourists than Ontario (10%, excluding residents), Alberta (12%) or British Columbia (16%).

Atlantic Canada is also popular as a destination among Long-Haul Canadian Aboriginal Culture Tourists (24% including residents). Once their residents are excluded, the four Atlantic provinces remain a pleasure trip destination for almost 1-in-5 Long-Haul Canadian Aboriginal Culture Tourists (18%) – a level on par with British Columbia and ahead of Alberta. Long-Haul Canadian Aboriginal Culture Tourists who have been to Alberta over the past decade are also particularly likely to have visited British Columbia (28%).

TABLE 8: CANADIAN DESTINATIONS	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<b>Alberta</b>				
Any purpose, past 10 years	79%	28%	100%	-
Any purpose, past 2 years	71%	14%	49%	-
<b>Pleasure, past 2 years</b>	<b>57%</b>	<b>12%</b>	<b>43%</b>	<b>-</b>
Excluding Alberta Residents	33%	N/A	N/A	N/A
<b>Overnight Pleasure Trips in Past 2 Years to . . .</b>				
<b>Atlantic Canada</b>	<b>9%</b>	<b>24%</b>	<b>32%</b>	<b>20%</b>
Excluding Atlantic Canada Residents	N/A	18%	28%	15%
<b>Québec</b>	<b>17%</b>	<b>48%</b>	<b>55%</b>	<b>45%</b>
Excluding Québec Residents	N/A	24%	41%	18%
<b>Ontario</b>	<b>26%</b>	<b>64%</b>	<b>81%</b>	<b>58%</b>
Excluding Ontario Residents	N/A	10%	12%	10%
<b>Manitoba</b>	<b>16%</b>	<b>6%</b>	<b>15%</b>	<b>3%</b>
Excluding Manitoba Residents	10%	N/A	N/A	N/A
<b>Saskatchewan</b>	<b>30%</b>	<b>5%</b>	<b>16%</b>	<b>1%</b>
Excluding Saskatchewan Residents	22%	N/A	N/A	N/A
<b>British Columbia</b>	<b>68%</b>	<b>16%</b>	<b>28%</b>	<b>12%</b>
Excluding British Columbia Residents	27%	N/A	N/A	N/A

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 47 and 48. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade.

#### 4. U.S. Pleasure Travel Destinations

##### Regional Canadian Aboriginal Culture Tourists

American states competing with Alberta for the Regional Canadian Aboriginal Culture Tourist market represent a mix of those at or near the region's border and sun/sea destinations (see Table 9). Of the border states, Washington (15%), Montana (13%) and Idaho (11%) are most apt to draw Regional Canadian tourists, likely because of the high proportion of these tourists who live in British Columbia. Of the sun/sea states, California is especially popular, having attracted almost one-quarter of the Aboriginal Culture Tourist market for a pleasure trip in the past two years. Florida and Hawaii are also comparatively popular destinations for these Regional Canadian tourists.

Top U.S. State Destinations	Regional Canadian Aboriginal Culture Tourists
California	23%
Washington	15%
Montana	13%
Oregon	12%
Idaho	11%
Florida	10%
Hawaii	10%

##### Long-Haul Canadian Aboriginal Culture Tourists

Depending on how the information is assessed, Alberta either competes with *very few* American states for the Long-Haul Canadian Aboriginal Culture Tourist market or it competes with *many*. Only four relatively *long-haul* states have attracted at least 1-in-20 of these tourists for an overnight pleasure trip in the past two years – Florida (13%) and, less commonly, California (6%), Nevada (5%) and Texas (5%). Other popular U.S. destinations are *near markets* for easterners. For example, the single most popular U.S. destination – New York – borders both Ontario and Québec.

Top U.S. State Destinations	Long-Haul Canadian Aboriginal Culture Tourists
New York State	22%
Florida	13%
Michigan	7%
Maine	7%
Massachusetts	7%
California	6%
Pennsylvania	6%
Nevada	5%
Texas	5%

Travel to the longer haul markets such as Florida or California could as readily be driven by eastern Canadians' pursuit of a winter respite as by Aboriginal culture interests.

TABLE 9: U.S. DESTINATIONS\*

	Canadian Aboriginal Culture Tourists			
	Total	Total	Long-Haul	
	Regional	Long-Haul	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<i>In alphabetical order</i>				
Arizona	6%	2%	1%	2%
California	23%	6%	10%	4%
Florida	10%	13%	13%	14%
Hawaii	10%	2%	4%	1%
Idaho	11%	1%	1%	1%
Maine	2%	7%	12%	5%
Massachusetts	3%	7%	13%	4%
Michigan	3%	7%	11%	5%
Montana	13%	**	14%	**
Nevada	7%	5%	6%	5%
New Jersey	7%	4%	3%	4%
New York State	9%	22%	26%	20%
North Dakota	7%	1%	2%	1%
Oregon	12%	1%	1%	**
Pennsylvania	2%	6%	7%	6%
Texas	4%	5%	9%	3%
Washington	15%	1%	4%	**

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 47. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade. \*States displayed represent destinations visited by at least 5% of Regional or Long-Haul Canadian sector members. \*\*Less than 0.5%.

## 5. Destinations: Roles & Ratings

### a) Importance of Destination

#### **Regional Canadian Aboriginal Culture Tourists**

About one-third of Regional Canadian Aboriginal Culture Tourists claim that **destination** is their first consideration in planning a recent summer and/or winter trip (see Table 10). Almost as many start their trip planning process with a focus on the **type of vacation experience** they wish to have (30%) or begin with the **activities** they want to enjoy while on their trip (27%). Fewer than half of Western Canada's Aboriginal Culture Tourists put a premium on **destination choice** *per se*, claiming that it is *extremely* or *very important* to them (45%).

#### **Long-Haul Canadian Aboriginal Culture Tourists**

Long-Haul Canadian Aboriginal Culture Tourists are more **destination-oriented** than are their Regional counterparts. Over half of these eastern Canadians indicate that destination is their first consideration in planning a recent summer and/or winter trip. About one-quarter start their trip planning process with a focus on the **type of vacation experience** they wish to have and one-fifth begin the process with the **activities** they want to enjoy while on their trip.

Eastern Canada's Aboriginal Culture Tourists also put a strong premium on **destination choice** *per se*, with two-thirds claiming that it is *extremely* or *very important* to them.

TABLE 10: CONSIDERATIONS/ IMPORTANCE OF DESTINATION

	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<b>First Consideration for Most Recent Summer/Winter Trip (NET)*</b>				
Start with destination	35%	53%	52%	53%
Start with type of vacation experience	30%	24%	22%	25%
Start with activities	27%	21%	29%	18%
Look for package deal	3%	3%	2%	4%
Other/not stated	30%	20%	22%	19%
<b>Importance of Destination</b>				
Extremely/Very Important (SUM)	45%	65%	73%	62%
Extremely important	19%	22%	29%	19%
Very important	26%	44%	44%	44%
Average**	3.5	3.8	4.0	3.7

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 24 and 26. Percentages for "first consideration" do not add to 100% because not all response categories are shown and/or multiple responses were permitted. \*Based on respondents who reported taking a summer and/or winter overnight pleasure trip in past two years. \*\*Average based on assigned values of 5 for "extremely important" to 1 for "not at all important". Averages are calculated only on those volunteering an opinion. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade.

## b) Importance of Conditions in Destination Choice

Overnight pleasure travellers were asked to rate a variety of “conditions” in terms of their importance in making a destination choice. A three-point semantic scale was used.<sup>7</sup>

### Regional Canadian Aboriginal Culture Tourists

Regional Canadian Aboriginal Culture Tourists put *feeling safe* (51%) at the top of their list when indicating the conditions they accord *high importance* for selecting a destination (see Table 11). About half of them seek a destination with *many things for adults to see and do* (48%) and two-fifths want their destination to pose *no health concerns* (40%). *Convenient access by car* to their destination is deemed highly important by one-third of these western Canadians (34%).<sup>8</sup>

About 3-in-10 Regional Canadian Aboriginal Culture Tourists would like a destination that offers *direct air access*, followed by *internet information*, *mid-range or budget accommodation*, and/or *activities for children*.

### Summary: Considerations Deemed Highly Important By At Least 1-in-3 Regional Canadian Tourists

	Regional Canadian Aboriginal Culture Tourists	All Regional Pleasure Tourists
Feeling safe	51%	68%
Lots for adults to see/do	48%	41%
No health concerns	40%	48%
Convenient access by car (to destination)	34%	40%

Compared to the regional pleasure travel market as a whole, those in the Aboriginal Culture sector are somewhat less concerned about health and safety issues and easy car access to the destination, but are equally apt to attach high importance to activities for adults.

### Long-Haul Canadian Aboriginal Culture Tourists

Like their Regional counterparts, Long-Haul Canadian Aboriginal Culture Tourists put *feeling safe* (67%) at the top of their list (see Table 11). Almost half of them want

<sup>7</sup> “Highly important”, “Somewhat important”, and “Of no importance”.

<sup>8</sup> The question wording suggests that variables related to transportation are associated with getting to the destination: *How important are each of the following conditions when choosing a destination for an out-of-town pleasure or vacation trip of one or more nights?*

*convenient access by car* to their destination<sup>9</sup> (46%) and want to encounter *no health concerns* (47%) and/or *many things for adults to see and do* (44%). Approximately one-third of these eastern Canadians seek destinations offering *mid-range lodging* (34%), *direct air access* (30%) and/or *budget lodging* (32%). Almost as many Long-Haul Canadian Aboriginal Culture Tourists want destinations to offer convenient access by train/bus (28%). One-quarter of these tourists place a high level of importance on the *availability of information on the internet* and/or *low cost packages*.

**Summary: Considerations Deemed Highly Important By At Least 1-in-3 Long-Haul Canadian Tourists**

	<b>Long-Haul Canadian Aboriginal Culture Tourists</b>	<b>All Long- Haul Pleasure Tourists</b>
Feeling safe	<b>67%</b>	65%
No health concerns	<b>47%</b>	51%
Convenient access by car (to destination)	<b>46%</b>	45%
Lots for adults to see/do	<b>44%</b>	37%
Mid-range accommodation	<b>34%</b>	30%

When evaluating destination attributes, members of the Aboriginal Culture sector closely resemble the long-haul pleasure travel market as a whole. They are, however, somewhat more likely to attach high importance to activities for adults.

<sup>9</sup> The question wording suggests that variables related to transportation are associated with getting to the destination: *How important are each of the following conditions when choosing a destination for an out-of-town pleasure or vacation trip of one or more nights?*

TABLE 11: CONDITIONS FOR SELECTING A DESTINATION

	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
Feeling safe	51%	67%	71%	65%
Lots for adults to see/do	48%	44%	48%	42%
No health concerns	40%	47%	37%	51%
Convenient access by car (to destination)	34%	46%	45%	46%
Direct access by air (to destination)	29%	30%	32%	30%
Information available on internet	26%	25%	31%	22%
Budget accommodation	22%	32%	21%	36%
Mid-range accommodation	20%	34%	31%	35%
Lots for children to see/do	20%	17%	15%	17%
Low cost packages available	18%	25%	19%	28%
Convenient access by train/bus (to destination)	17%	28%	19%	31%
Very different culture than own	13%	17%	22%	15%
Familiar with culture & language	13%	15%	5%	18%
Camping	12%	17%	11%	20%
Have friends or relatives there	11%	9%	10%	9%
Luxury accommodation	9%	8%	15%	5%
Great shopping	7%	14%	19%	12%
Disabled-person-friendly	2%	9%	7%	10%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 27. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade.

### c) Appeal of Various Destinations

#### Regional Canadian Aboriginal Culture Tourists

According to 7.8 on a ten-point scale, Regional Canadian Aboriginal Culture Tourists rate Alberta between Hawaii (8.1) and California (7.5) as an *appealing destination* (see Table 12).<sup>10</sup> The province is, however, rated substantively lower than its neighbouring British Columbia (9.2).

Within the Regional Canadian market for Aboriginal cultural experiences, Alberta is rated slightly more positively (7.8) than it is among *all* regional pleasure travellers (7.4).

#### Summary: Highest Appeal Destinations – Regional Canadian Tourists

	Regional Canadian Aboriginal Culture Tourists	All Regional Pleasure Tourists
British Columbia	9.2	8.9
Hawaii	8.1	8.1
<b>Alberta</b>	<b>7.8</b>	<b>7.4</b>
California	7.5	7.4
Nova Scotia	7.4	7.1

#### Long-Haul Canadian Aboriginal Culture Tourists

Like their Regional neighbours, Long-Haul Canadian Aboriginal Culture Tourists are most enthusiastic about British Columbia as an *appealing destination* for pleasure travel, according to this province an average rating of 8.7 on a ten-point scale (see summary table, following page). On the same scale, Alberta is rated at 7.5. Other destinations deemed *more* appealing than Alberta by Long-Haul Canadian Aboriginal Culture Tourists include Hawaii (8.3) and Ontario (8.2).<sup>11</sup> Alberta's rating is at parity with Québec's (7.7).

The rating accorded Alberta by eastern Canadian Aboriginal culture enthusiasts (7.5) is significantly higher than that accorded to the province by *all* overnight pleasure travellers from Ontario, Québec and the Atlantic provinces (6.7).

<sup>10</sup> Two image questions associated with specific destinations were included in the TAMS study. One of these asked travellers to use a ten-point bi-polar rating scale ranging from *very appealing* (10) to *very unappealing* (1) to assess each destination's appeal for a pleasure trip. The second question associated with reasons to travel to a destination is discussed in the following chapter (B.5.d).

<sup>11</sup> Additional destinations *appear* to have higher ratings than does Alberta, but in light of the sample size and distribution of responses to the question, the differences are not *significant*. A spread of more than four tenths (0.4) between one destination and another is required to constitute a "real" difference in average ratings.

**Summary: Highest Appeal Destinations – Long-Haul Canadian Tourists**

	<b>Long-Haul Canadian Aboriginal Culture Tourists</b>	<b>All Long- Haul Pleasure Tourists</b>
British Columbia	8.7	8.3
Hawaii	8.3	8.2
Ontario	8.2	7.5
Québec	7.7	7.3
<b>Alberta</b>	<b>7.5</b>	<b>6.7</b>
Prince Edward Island	7.4	7.1
California	7.4	7.5

Not surprisingly, those with Alberta travel experience over the past decade are also more favourably disposed to Alberta as a destination (8.3) than are Long-Haul Canadian Aboriginal Culture Tourists as a whole (7.5). Nonetheless, even within this experienced segment, British Columbia (9.2) outperforms Alberta (8.3).

TABLE 12: APPEAL OF VARIOUS DESTINATIONS\*

	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<b>Alberta</b>	<b>7.8</b>	<b>7.5</b>	<b>8.3</b>	<b>7.1</b>
Newfoundland & Labrador	6.9	6.8	7.1	6.7
Nova Scotia	7.4	7.3	7.6	7.2
New Brunswick	6.7	6.9	6.7	7.0
Prince Edward Island	7.1	7.4	7.7	7.3
Québec	6.7	7.7	7.6	7.8
Ontario	6.7	8.2	8.4	8.1
Manitoba	5.1	5.4	5.2	5.5
Saskatchewan	5.3	5.2	4.7	5.5
British Columbia	9.2	8.7	9.2	8.5
Yukon	6.8	6.9	7.4	6.7
Northwest Territories	6.4	6.3	6.7	6.2
Nunavut	5.8	6.1	6.2	6.0
<b>U.S. STATES</b>				
New York State	6.5	6.8	7.2	6.6
Colorado	6.4	6.8	7.4	6.5
Florida	6.8	7.0	6.9	7.0
California	7.5	7.4	7.9	7.1
Hawaii	8.1	8.3	8.7	8.2
Arizona	7.1	6.8	7.5	6.5

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 28. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade. \*Averages are calculated using a ten-point bi-polar rating scale ranging from very appealing (10) to very unappealing (1). Averages are calculated on those volunteering a rating only.

#### d) Number of Good Reasons to Visit Various Destinations

##### Regional Canadian Aboriginal Culture Tourists

The *same* destinations accorded high *appeal* ratings are the ones that emerge at the top of Regional Canadian Aboriginal Culture Tourists' lists for having *many good reasons* to visit on a pleasure trip (see Table 13).<sup>12</sup> Specifically, British Columbia tops the list with close to 9-in-10 stating that there are many good reasons to go to this province. In contrast, fewer than half of Regional Canadian Aboriginal Culture Tourists state that there are many good reasons to travel within or to Alberta (48%), putting this province at about parity with California, Hawaii and Nova Scotia.

Impressions of Alberta within the Regional Canadian Aboriginal *culture tourist* market (48%) are somewhat less positive than is the case among regional *pleasure tourists as a whole* (56%).

##### Summary: Highest Rated Destinations – Regional Canadian Tourists

	Regional Canadian Aboriginal Culture Tourists	All Regional Pleasure Tourists
British Columbia	87%	80%
California	53%	48%
Hawaii	53%	48%
<b>Alberta</b>	<b>48%</b>	<b>56%</b>
Nova Scotia	47%	32%

##### Long-Haul Canadian Aboriginal Culture Tourists

The *same* destinations accorded high *appeal* ratings tend to be the ones that emerge at the top of Long-Haul Canadian Aboriginal Culture Tourists' lists for having *many good reasons* to visit on a pleasure trip (see following page for summary table). Specifically, British Columbia tops the list with 7-in-10 stating that there are many good reasons to go to this province. Six-in-ten of these tourists say that there are many good reasons to visit Ontario and/or Québec, but less than 5-in-10 make this claim with respect to Alberta (45%). Among these eastern Canadians, Alberta is rated similarly to Hawaii (49%) and Nova Scotia (42%).

As is the case for overall touristic appeal, experience with Alberta's tourism infrastructure increases the province's appeal rating. More Long-Haul Canadian Aboriginal Culture Tourists who have travelled within Alberta over the past decade

<sup>12</sup> Consumers were asked to indicate which of three statements best described their feelings about taking a pleasure trip to the same destinations for which they rated *appeal* (see previous section). The statements were *there are NO good reasons to travel to this destination*, *SOME good reasons . . .* and *MANY good reasons to travel to this destination*.

claim that there are *many good reasons* to visit (75%) than is the case among those who have not been to Alberta in the past ten years or so (34%).

Members of eastern Canada's market for *Aboriginal cultural experiences* are also more apt to conclude that there are many good reasons to visit Alberta (45%) than are eastern Canadian *pleasure travellers as a whole* (29%).

**Summary: Highest Rated Destinations – Long-Haul Canadian Tourists**

	<b>Long-Haul Canadian Aboriginal Culture Tourists</b>	<b>All Long- Haul Pleasure Tourists</b>
British Columbia	70%	58%
Ontario	62%	50%
Québec	60%	47%
Hawaii	49%	54%
<b>Alberta</b>	<b>45%</b>	<b>29%</b>
Nova Scotia	42%	33%

TABLE 13: NUMBER OF REASONS TO VISIT VARIOUS DESTINATIONS

	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<i>% stating MANY good reasons to visit destination</i>				
<b>Alberta</b>	<b>48%</b>	<b>45%</b>	<b>75%</b>	<b>34%</b>
Newfoundland & Labrador	38%	31%	38%	29%
Nova Scotia	47%	42%	59%	36%
New Brunswick	34%	29%	22%	32%
Prince Edward Island	32%	39%	51%	34%
Québec	38%	60%	57%	62%
Ontario	32%	62%	62%	62%
Manitoba	12%	13%	5%	16%
Saskatchewan	14%	13%	4%	16%
British Columbia	87%	70%	85%	64%
Yukon	25%	34%	39%	32%
Northwest Territories	17%	25%	28%	24%
Nunavut	11%	24%	23%	24%
<b>U.S. STATES</b>				
New York State	30%	34%	41%	31%
Colorado	16%	28%	34%	26%
Florida	42%	35%	35%	34%
California	53%	38%	51%	33%
Hawaii	53%	49%	56%	47%
Arizona	22%	27%	44%	20%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 29. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade.

## C. Activities on Overnight Trips

### 1. Introduction

The 2006 TAMS questionnaire included approximately 190 activities a person may have engaged in while on a trip. In addition to capturing *incidence* of participation in this array of activities, the study asked consumers to indicate whether an activity they engaged in on *any* overnight trip in the past two years was a *main reason for taking any of these trips*.<sup>13</sup>

As noted previously, Canadian Aboriginal Culture Tourists claim to have taken an overnight trip motivated by at least one of the activities listed below in the past two years and to have taken overnight pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited:

- Aboriginal cultural experiences in a remote or rural setting for one or more nights;
- Aboriginal heritage attractions;
- Aboriginal festivals and events;
- Aboriginal cuisine;
- Aboriginal arts and crafts shows; and/or
- Aboriginal outdoor adventure and/or sports.

Nonetheless, it is reasonable to assume that some of the Aboriginal activities, attractions and/or events that motivated trips among those who have been to Alberta over the past decade were within the province.

#### **“Main Reason” and “Any Participation”**

Tourists who indicate that a particular activity is the *main reason for taking a trip* are, in effect, expressing a much more significant commitment to the activity than are those who say they engaged in a particular activity on at least one of the overnight trips they took recently. In the following section, information is presented for selected individual or groups of related activities that *drive* Canadian Aboriginal Culture Tourists to take overnight pleasure trips (*main reason*) and the level of *any* participation in these same activities.

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<sup>13</sup> Presumably, “these trips” are those on which the specific activity took place.

## 2. Trip Activities & Drivers

### a) Major Trip Activity Groups

Like most tourists, Regional and Long-Haul Canadian Aboriginal Culture Tourists take different trips for different reasons, depending on their day-to-day realities, the time of year and a host of other factors (see Table 14).<sup>14</sup>

#### Regional Canadian Aboriginal Culture Tourists

- In addition to taking trips to engage in Aboriginal cultural activities, almost all tourists in this niche sector take trips primarily to engage in at least one **land-based outdoor activity** such as going to nature parks, hiking, bird watching or viewing land-based animals (77%). Almost two-thirds take trips in order to stay in a resort, lodge or campground (**lodging**, 64%).
- The prominence of **fairs and festivals** as a trip driver among Regional Canadian Aboriginal Culture Tourists (62%) is likely related to the strong lure of pow wows and other Aboriginal festivals as the main reason for taking a trip by members of this niche market.<sup>15</sup>
- More than half are motivated to take trips by at least one **water-based outdoor activity** such as sunbathing or sitting on a beach, swimming in lakes or oceans or fishing.
- **Culinary activities**, including sampling Aboriginal cuisine, are primary trip drivers for over two-fifths of Regional Canadian Aboriginal Culture Tourists.<sup>16</sup>
- For about one-third of these western Canadians, **shopping**, various forms of **entertainment** such as amusement parks or zoos, and/or **spectator sporting events** are main reasons for overnight pleasure trips in the past two years.
- Several culturally-oriented activities, including going to **historic sites or buildings**, **museums** and **performing arts events**, along with **outdoor winter activities** are primary reasons for travel for approximately 1-in-4 Regional Canadian Aboriginal Culture Tourists.
- One-fifth of this niche market identifies **art galleries** as the primary motivation for a recent overnight pleasure trip.

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<sup>14</sup> For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

<sup>15</sup> *Aboriginal festivals and events* (e.g., *pow wows*) are included in the "Fairs/Festivals" grouping.

<sup>16</sup> *Aboriginal cuisine* is included in the "Food & Wine" grouping.

Not surprisingly, *participation* rates for many activities are appreciably higher than are *motivation* rates. Increases in *any participation* over *motivation (main reason)* are evident for every major activity group among Regional Canadian Aboriginal Culture Tourists. For example, more of them *participated* in at least one land-based outdoor activity while on a recent overnight pleasure trip (93%) than claim to have taken a trip motivated by one of these activities (77%). The most dramatic shift, however, is associated with shopping. Nine-in-ten of these western Canadian Aboriginal Culture Tourists say that they went shopping on a recent trip but only 1-in-3 of them took the trip primarily *in order to shop*.

### Long-Haul Canadian Aboriginal Culture Tourists

- More than three-fifths of the tourists in this niche sector take trips primarily to engage in at least one **land-based outdoor activity** such as seeing natural wonders or nature parks, hiking, bird watching or viewing land-based animals (64%) or a **water-based outdoor activity** such as sunbathing or sitting on a beach, swimming in lakes or oceans or fishing (62%).
- **Culinary activities**, including sampling Aboriginal cuisine<sup>17</sup>, **lodging** experiences (resorts, lodges, campgrounds), and **fairs or festivals**, including Aboriginal events such as pow wows are primary trip drivers for about half of Long-Haul Canadian Aboriginal Culture Tourists.<sup>18</sup>
- Almost two-fifths of eastern Canadian sector members claim to have taken trips primarily to **shop** (39%) or to engage in **winter outdoor sports** (38%).
- About one-third of these Canadian Aboriginal Culture Tourists say they have taken holidays with a primary motivation of going to **historic sites/buildings** or to various **entertainment** attractions such as amusement parks or zoos.
- **Cultural performances** such as live theatre, **museums** and/or **spectator sporting events** such as professional baseball or football games are primary trip drivers for at least 1-in-4 Long-Haul Canadian Aboriginal Culture Tourists.

Increases in *any participation* over *motivation (main reason)* are evident for every major activity group among Long-Haul Canadian Aboriginal Culture Tourists. For example, more of these eastern Canadian Aboriginal Culture Tourists *participated* in at least one land-based outdoor activity while on a recent overnight pleasure trip (82%) than claim to have taken a trip motivated by one of these activities (64%). The most dramatic shift, however, is associated with shopping. Over four-fifths of these Canadian

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<sup>17</sup> *Aboriginal cuisine* is included in the "Food & Wine" grouping.

<sup>18</sup> *Aboriginal festivals and events (e.g., pow wows)* are included in the "Fairs/Festivals" grouping.

Aboriginal Culture Tourists say that they went shopping on a recent trip but only two-fifths of them took the trip primarily *in order to shop*.

\* \* \* \* \*

- Whether they live in eastern or western Canada, Aboriginal Culture Tourists are characterized by an especially strong interest in land-based and/or water-based *outdoor* activities.
- Despite their interest in Aboriginal cultural attractions and events, these same tourists display comparatively weak interest in other cultural attractions such as historic sites, museums, art galleries or arts performances.
- They may place particular emphasis on *Aboriginal activities* for some of their trips, but many also take trips in order to obtain a wide variety of outdoor, resort or lodge experiences, to enjoy local and internationally acclaimed cuisine or wine tasting, and go to fairs and festivals. Packaging and marketing Aboriginal experiences and activities consistent with these *other* interests may be particularly successful.
- The contrast between the very high levels of participation in dining and shopping and appreciably lower levels of trips motivated by these activities suggests that Regional and Long-Haul Canadian Aboriginal Culture Tourists may require assurances that they will have opportunities to shop, eat in restaurants using local ingredients or that offer Aboriginal cuisine, and sit at outdoor cafes while on an Alberta-bound trip.

TABLE 14: MAJOR ACTIVITY GROUPS  
- MAIN & ANY

	Canadian Aboriginal Culture Tourists			
	Regional		Long-Haul	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(236)	(236)	(343)	(343)
Weighted, Projected	189,000	189,000	375,000	375,000
Aboriginal Culture/Events	100%	100%	100%	100%
Outdoor Land-Based Activities	77%	93%	64%	82%
Lodging (Lodges, Resorts, etc.)	64%	89%	49%	73%
Fairs/Festivals*	62%	85%	55%	76%
Outdoor Water-Based Activities	56%	88%	62%	85%
Food & Wine**	42%	95%	53%	89%
Shopping	36%	91%	39%	85%
Theme/Amusement Parks/Movies (Entertainment)	32%	54%	34%	56%
Spectator Sports	31%	39%	27%	39%
Historic Sites/Buildings	29%	64%	36%	56%
Outdoor Winter Activities	28%	37%	38%	53%
Museums	26%	61%	27%	55%
Performing Arts	24%	51%	28%	46%
Art Galleries	21%	43%	20%	40%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. \*\*Aboriginal festivals and events (e.g., pow wows)\* are included in the "Fairs/Festivals" grouping. \*\*\*Aboriginal cuisine" is included in the "Food & Wine" grouping.

## b) Individual Trip Activities: The Outdoors

### Regional Canadian Aboriginal Culture Tourists

Outdoor activities that attract at least 1-in-2 Regional Canadian Aboriginal Culture Tourists on an *any participation* basis include going to nature parks, sunbathing or sitting on a beach, camping, and/or viewing flora or fauna (see Table 15).<sup>19</sup> Slightly fewer include swimming in lakes, seeing well-known wonders, and day hiking excursions among their trip activities. Of these activities, going to nature parks (43%) is most apt to be a trip driver (*main activity*).

In addition to those mentioned above, outdoor activities that might complement Aboriginal culture trip activities include golfing, fishing, or boating. Each of these activities has been included in a recent pleasure trip's "activity bundle" by at least 1-in-5 Regional Canadian Aboriginal Culture Tourists. Of them, fishing (13%) and boating (11%) are the most apt to have *driven* trips for these tourists.

### Long-Haul Canadian Aboriginal Culture Tourists

Like their western counterparts, Long-Haul Canadian Aboriginal Culture Tourists engage in *land-based* and *water-based* outdoor activities, particularly as the driving force behind a trip (*main activity*). While sunbathing and swimming in lakes are the most prevalent water-based activities, these tourists are also relatively avid anglers, canoeists or kayakers, and boaters (sail/motor boats).

This market also demonstrates considerable enthusiasm for visiting nature parks (53%), viewing flora and fauna (51%), camping (51%), seeing natural wonders (46%) and hiking (45%). Of these activities, visiting nature parks (34%) is most commonly cited as a *trip driver*. Sites such as the Canadian Badlands and nature parks within Alberta, as *natural wonders* and as places to view wildlife or hike, might provide additional encouragement for these Canadian Aboriginal Culture Tourists to come to the province.

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<sup>19</sup> For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

TABLE 15: INDIVIDUAL OUTDOOR ACTIVITIES – MAIN &amp; ANY\*

	Canadian Aboriginal Culture Tourists			
	<u>Regional</u>		<u>Long-Haul</u>	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(236)	(236)	(343)	(343)
Weighted, Projected	189,000	189,000	375,000	375,000
<b><u>Outdoor Land-Based Activities</u></b>	<b>77%</b>	<b>93%</b>	<b>64%</b>	<b>82%</b>
<b>Camping</b>	37%	57%	30%	51%
Public campground	33%	50%	24%	45%
Private campground	16%	34%	15%	30%
Wilderness campsite	10%	15%	10%	18%
<b>Nature park</b>	43%	66%	34%	53%
<b>Well-known natural wonders</b>	26%	46%	29%	46%
<b>Flora/fauna viewing</b>	26%	51%	24%	51%
Wildlife viewing – land-based animals	20%	42%	12%	31%
Whale watching	14%	21%	12%	27%
Bird watching	12%	26%	8%	24%
Wildflowers/flora	9%	22%	11%	24%
<b>Golfing</b>	10%	26%	5%	17%
<b>Hiking – Day excursions</b>	9%	44%	25%	45%
<b><u>Outdoor Water-Based Activities</u></b>	<b>56%</b>	<b>88%</b>	<b>62%</b>	<b>85%</b>
<b>Sunbathing or sitting on a beach</b>	29%	64%	31%	57%
<b>Swimming in lakes</b>	15%	49%	23%	56%
<b>Swimming in oceans</b>	14%	44%	14%	39%
<b>Fishing</b>	13%	24%	27%	43%
<b>Boating (sail/motor boating)</b>	11%	20%	14%	34%
<b>Canoeing/kayaking</b>	6%	12%	12%	30%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. \*Activities shown here are those that are named by approximately 1-in-4 sector members as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover.

### c) Individual Trip Activities: Culture and Entertainment

By definition, Canadian Aboriginal Culture Tourists take some of their trips *in order to* participate in Aboriginal cultural experiences in a remote or rural setting, heritage attractions, festivals and events such as pow wows, sample Aboriginal cuisine, go to Aboriginal arts and crafts shows or participate in Aboriginal outdoor adventure and/or sports. Some are also motivated to take trips in order to engage in a variety of other cultural and entertainment activities (see Table 16).

#### Regional Canadian Aboriginal Culture Tourists

##### Activities that Define the Sector

Of the activities used to define the Aboriginal culture sector, most attract appreciably higher *participation* rates (*any*) than *motivation* rates (*main reason*). For example half of Regional Canadian Aboriginal Culture Tourists indicate that they have taken a recent overnight pleasure trip in order to visit an Aboriginal heritage attraction (49%, *main*) but two-thirds of sector members have been to this type of attraction on a trip as one of their activities (66%, *any*). Similarly, one-third are primarily motivated to take a trip to attend a pow wow or other Aboriginal festival (35%, *main*) but half of them have been to this type of event on a recent trip (49%, *any*). Tasting Aboriginal foods, going to Aboriginal arts and crafts shows and engaging in Aboriginal outdoor adventure activities attract *participants* at about twice the rate they act as trip motivators for sector members.

The sole exception to this pattern is Aboriginal cultural experiences in a remote/rural setting. Almost all of the Regional Canadian Aboriginal Culture Tourists who identify this activity as one in which they participated while travelling (49%, *any*) say that it was the driving force behind a trip (45%, *main*).

##### Other Activities

Approximately 3-in-10 Regional Canadian sector members took recent holidays primarily in order to attend a spectator sporting event and/or to see historic sites or buildings. Between one-quarter and one-fifth of these travellers were on trips driven by their interest in strolling around a city to see architecture, going to an exhibition or fair, visiting a general history museum or an art gallery, or attending a free outdoor performance.

##### Any Participation

With the exception of Aboriginal culture activities, most other cultural and entertainment activities are noticeably more likely to be *one-of-many* trip activities than they are to be trip drivers for Regional Canadian Aboriginal Culture Tourists.<sup>20</sup> For example, 3-in-10 say they took at least one recent pleasure trip primarily to see a well-

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<sup>20</sup> For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

known historic site or other historic monuments or buildings (29%, *main*), but appreciably more did so as one of their trip activities (64%, *any*). Analogously, 1-in-4 have taken a trip to stroll around cities to see architecture (25%, *main*) but more than twice this proportion engaged in this type of activity as one among others on recent pleasure trips (57%, *any*).

### **Long-Haul Canadian Aboriginal Culture Tourists**

#### **Activities that Define the Sector**

Similar to their Regional counterparts, more Long-Haul Canadian Aboriginal Culture Tourists engage in activities used to define the Aboriginal culture sector as one-of-many trip activities than name these activities as the main reason for recent pleasure travel. For example, half of them indicate that they have taken a recent overnight pleasure trip in order to visit an Aboriginal heritage attraction (50%, *main*) but two-thirds of sector members have been to this type of attraction on a trip as one of their activities (65%, *any*). One-sixth are primarily motivated to take a trip to taste Aboriginal foods (17%, *main*) but twice this proportion have engaged in this activity on a recent trip (34%, *any*). Going to Aboriginal arts and crafts shows and engaging in Aboriginal outdoor adventure activities also attract *participants* at about twice the rate they act as trip motivators for sector members.

Exceptions to this pattern are attending a pow wow or other Aboriginal festival or engaging in Aboriginal cultural experiences in a remote/rural setting. For the most part, those who identify these activities as ones in which they participated while travelling say that it was the driving force behind a trip.

#### **Other Activities**

Over 3-in-10 Long-Haul Canadian sector members took recent holidays primarily in order to see historic sites or buildings or to stroll around a city to see architecture. Slightly fewer took trips driven by attending a spectator sporting event, arts performance and/or visiting a museum. Approximately one-fifth of these eastern Canadians took trips driven primarily by farmers' markets or country fairs, zoos, amusement parks, movies, art galleries and/or fireworks displays.

#### **Any Participation**

With the exception of Aboriginal culture activities, most other cultural and entertainment activities are noticeably more likely to be *one-of-many* trip activities than they are to be trip drivers for Long-Haul Canadian Aboriginal Culture Tourists.<sup>21</sup> For example, 1-in-3 say they took at least one recent pleasure trip primarily to see a well-known historic site or other historic monuments or buildings (36%, *main*), but appreciably more did so as one of their trip activities (56%, *any*). Analogously, 3-in-10 have taken a trip to stroll around cities to see architecture (31%, *main*) but almost 6-in-

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<sup>21</sup> For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

10 have engaged in this type of activity as one among others on recent pleasure trips (58%, *any*).

TABLE 16: INDIVIDUAL ABORIGINAL/ CULTURAL/ ENTERTAINMENT ACTIVITIES – MAIN &amp; ANY\*

	Canadian Aboriginal Culture Tourists			
	Regional		Long-Haul	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(236)	(236)	(343)	(343)
Weighted, Projected	189,000	189,000	375,000	375,000
<b>Aboriginal Activities</b>				
Aboriginal heritage attractions (e.g., museums, interpretive centres)	49%	66%	50%	65%
Aboriginal cultural experiences in remote/rural setting (1+ nights)	45%	49%	34%	40%
Aboriginal festivals and events (e.g., pow wows)	35%	49%	31%	38%
Aboriginal arts and crafts shows	29%	51%	29%	47%
Aboriginal cuisine (tasted or sampled)	25%	50%	17%	34%
Aboriginal outdoor adventure and/or sports	11%	24%	6%	10%
<b>Fairs/Festivals (any)**</b>	<b>62%</b>	<b>85%</b>	<b>55%</b>	<b>76%</b>
Exhibitions, fairs	24%	41%	14%	24%
Fireworks displays	17%	36%	19%	35%
<b>Historic sites/buildings (any)</b>	<b>29%</b>	<b>64%</b>	<b>36%</b>	<b>56%</b>
Historic sites – well-known	18%	50%	22%	42%
Other historic sites, monuments, buildings	17%	50%	21%	35%
Historic replicas with re-enactments	16%	28%	16%	30%
<b>Strolling around a city to see architecture</b>	<b>25%</b>	<b>57%</b>	<b>31%</b>	<b>58%</b>
<b>Museums (any)</b>	<b>26%</b>	<b>61%</b>	<b>27%</b>	<b>55%</b>
General history museum	22%	54%	17%	42%
<b>Performing Arts (any)</b>	<b>24%</b>	<b>51%</b>	<b>28%</b>	<b>46%</b>
Music performances	17%	33%	14%	25%
Live theatre performances	9%	34%	18%	30%
<b>Art galleries</b>	<b>21%</b>	<b>43%</b>	<b>20%</b>	<b>40%</b>
<b>Other Entertainment</b>				
Spectator sporting events	31%	39%	27%	39%
Free outdoor performances	22%	50%	17%	46%
Farmers' markets or country fairs	19%	43%	23%	37%
Zoos	17%	30%	22%	34%
Aquariums	17%	30%	12%	27%
Rock and roll/popular concerts	14%	17%	18%	28%
Botanical gardens	13%	32%	16%	30%
Movies/cinema	13%	42%	21%	53%
Amusement parks	11%	20%	22%	37%
Casinos	10%	28%	16%	41%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. \*Activities shown here are those that are named by approximately 1-in-4 sector members as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover. \*\*Aboriginal festivals and events (e.g., pow wows) are included in the "Fairs/Festivals" grouping. The activity is displayed individually under "Aboriginal Activities" on this summary table.

**d) Individual Trip Activities: Lodging, Food/Wine, Shopping****Regional Canadian Aboriginal Culture Tourists**

**Lodging:** Resorts, including seaside, lakeside and mountain/ski resorts drive trips for two-fifths of Regional Canadian Aboriginal Culture Tourists (42%, *main*) and are used for lodging by three-fifths of them (60%, *any*) (see Table 17). Wilderness lodges are not as popular as are various resorts, either as a trip driver or form of accommodation on a trip taken primarily for other activities (9% *main*; 15% *any*).

**Food & Wine:** Collectively, food and wine activities, including tasting or sampling Aboriginal cuisine, drive trips for 4-in-10 Regional Canadian sector members and are engaged in by almost all of them (95%, *any*). Individually, Aboriginal cuisine, dining out at restaurants offering *local* ingredients and cuisine, visiting local outdoor cafes, dining at internationally acclaimed restaurants or other high-end restaurants, and going to wineries on day trips are much more common trip experiences (*any*) than trip drivers for these western Canadians.

**Shopping:** Shopping for apparel, books or music, and local arts and crafts is a common trip pastime for Regional Canadian Aboriginal Culture Tourists, but tends not to be the motivation for recent overnight pleasure travel (36% *main*; 91% *any*).

**Long-Haul Canadian Aboriginal Culture Tourists**

**Lodging:** Resorts, and especially those beside a lake or river, drive trips for almost one-third of Long-Haul Canadian Aboriginal Culture Tourists (31%, *main*) and are used for lodging by more than half of them (55%, *any*). Wilderness lodges are not as popular as are various resorts, either as a trip driver or form of accommodation on a trip driven by other activities (15% *main*; 22% *any*).

**Food & Wine:** Over half of eastern Canada's market for Aboriginal culture experiences take trips driven by food and/or wine activities, including tasting or sampling Aboriginal cuisine (53%). Almost all sector members engage in one of these activities on their trips (89%, *any*). Individually, dining out at restaurants offering *local* ingredients and cuisine or Aboriginal cuisine, visiting local outdoor cafes, dining at internationally acclaimed restaurants and going to wineries on day trips are much more common trip experiences (*any*) than trip drivers for these eastern Canadians.

**Shopping:** Shopping for apparel, books or music and/or local arts and crafts is a common trip pastime for Long-Haul Canadian Aboriginal Culture Tourists. Shopping is not, however, a strong trip motivator for these tourists (39% *main*; 85% *any*).

\* \* \* \* \*

Shopping and dining experiences are clearly in high demand as one of the many activities Canadian Aboriginal Culture Tourists engage in at a destination. Whether they reside in eastern or western Canada, these tourists might appreciate being informed of the availability of restaurants, local outdoor cafes, and shopping options in the context of the “amenities” Alberta destinations have to offer.

TABLE 17: OTHER ACTIVITIES – MAIN & ANY*	Canadian Aboriginal Culture Tourists			
	Regional		Long-Haul	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(236)	(236)	(343)	(343)
Weighted, Projected	189,000	189,000	375,000	375,000
<b>Lodging (NET)**</b>	<b>64%</b>	<b>89%</b>	<b>49%</b>	<b>73%</b>
Resorts/Spas	42%	60%	31%	55%
Lakeside resort	24%	39%	22%	41%
Seaside resort	21%	32%	16%	25%
Ski/mountain resort	13%	23%	8%	19%
Wilderness/remote lodge	9%	15%	15%	22%
<b>Food &amp; Wine</b>	<b>42%</b>	<b>95%</b>	<b>53%</b>	<b>89%</b>
Aboriginal cuisine (tasted or sampled) <sup>1</sup>	25%	50%	17%	34%
Dining – restaurants offering local ingredients and recipes	21%	77%	22%	67%
Wineries – day tours/tastings	13%	29%	9%	22%
Local outdoor cafes	8%	52%	17%	56%
Dining – high end restaurants with international reputation	6%	28%	12%	29%
Dining – other high end restaurants	5%	36%	13%	41%
<b>Shopping</b>	<b>36%</b>	<b>91%</b>	<b>39%</b>	<b>85%</b>
Clothing, shoes, jewellery	22%	70%	24%	64%
Local arts & crafts studios	22%	65%	14%	52%
Bookstores or music stores	20%	58%	19%	59%
Gourmet foods	16%	41%	10%	36%
Antiques	11%	44%	17%	47%
Greenhouse or garden centre	10%	28%	12%	29%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. \*Activities shown here are those that are named by approximately 1-in-4 sector members as ones they participated in (any) on a recent overnight trip. For the complete list of activities, see the detailed tabulations, under separate cover. \*\*Camping is included in Lodging (NET). See “Outdoor Activities” for camping as an outdoor activity. <sup>1</sup>Aboriginal cuisine is also displayed in Summary Table 16.

### e) Overnight Cruises & Organized Group Tours

#### **Regional Canadian Aboriginal Culture Tourists**

One-sixth of Regional Canadian Aboriginal Culture Tourists have recently been overnight cruise passengers (17%) (see Table 18). More than twice this proportion have taken some form of organized overnight tour over the past two of years (38%). These sector members are equally likely to have taken an **organized** overnight group tour (25%) as to have taken a **self-directed** overnight touring trip over a two-year period (23%). Those who have gone on an overnight organized tour exhibit no preference between tours with *multiple* (18%) versus *single* destinations (15%).

Taking a day tour while on an overnight trip is more characteristic of Regional Canadian Aboriginal Culture Tourists (58%) than is taking any type of overnight tour (38%).

#### **Long-Haul Canadian Aboriginal Culture Tourists**

Among Long-Haul Canadian Aboriginal Culture Tourists, one-quarter have recently been overnight cruise passengers (25%), about twice this proportion have taken some form of organized overnight tour over the past two of years (46%) and more than half have taken a day tour while on an overnight trip (56%).

**Self-directed** overnight tours are more popular within this market segment (36%) than are **organized** overnight tours (23%). Those who have gone on an overnight organized tour display a slight preference for tours with *multiple* (18%) rather than *single* destinations (12%).

TABLE 18: CRUISES/GROUP TOURS	Canadian Aboriginal Culture Tourists			
	Total	Total	Long-Haul	
	Regional	Long-Haul	Travellers to Alberta	Non-Alberta Travellers
	<b>Total</b>	<b>Total</b>		
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<b>Took any overnight cruise in past 2 years</b>	<b>17%</b>	<b>25%</b>	<b>28%</b>	<b>24%</b>
<b>Overnight Touring (NET)</b>	<b>38%</b>	<b>46%</b>	<b>59%</b>	<b>40%</b>
Organized Tour	25%	23%	23%	24%
Multiple Locations	18%	18%	16%	18%
Single Location	15%	12%	16%	10%
Self-Directed Touring	23%	36%	47%	31%
<b>Same-Day Touring on Overnight Trip (NET)</b>	<b>58%</b>	<b>56%</b>	<b>73%</b>	<b>50%</b>
Self-Directed Touring	42%	47%	64%	41%
Organized Excursion	39%	31%	49%	25%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 14, 16. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade.

## D. Trip Planning

### 1. Who Does the Planning?

Most Regional and Long-Haul Canadian Aboriginal Culture Tourists claim to have *personal involvement* in trip planning for **all** or **most** trips planned over the past two years (see Table 19).

In most households, the main responsibility for travel planning falls to the sector member or is shared with others in the household.

TABLE 19: TRAVEL PLANNING	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<b>Frequency of personal involvement in trip planning, past 2 years</b>				
All	62%	59%	74%	53%
Most	17%	18%	17%	19%
Some	11%	11%	7%	12%
None/not stated	11%	12%	3%	16%
<b>Main responsibility for trip planning</b>				
Respondent	34%	40%	64%	30%
Shared with other household member(s)	26%	27%	20%	30%
Spouse/partner	16%	8%	6%	9%
Other/not stated/not involved in travel planning	23%	25%	10%	31%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 18, 19. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade.

## 2. Travel Information Sources & Travel Media

### Regional Canadian Aboriginal Culture Tourists

Two-thirds of Regional Canadian Aboriginal Culture Tourists use the **internet** as a source of trip planning information (see Table 20). Other popular information sources include **advice of friends and relatives**, the tourist's **past experience** at a destination, **maps** and **travel agents**.

About one-third of Regional Canadian sector members rely on **official travel guides or brochures from provincial, state or national organizations** (*Official Travel Guides*), **visitor information centres** and/or **auto clubs** as sources of information about potential travel destinations.

#### Summary: Top Tourism Information Sources

	Regional Canadian Aboriginal Culture Tourists
Internet website	65%
Past experience	56%
Advice of friends/relatives	54%
Maps	48%
Travel agent	42%
Visitor information centres	37%
Official travel guides	37%
Auto club	33%

Travel sections of weekend and/or weekday daily newspapers are frequently read by one-third of these tourists. They claim to read a wide variety of magazines in a typical month, with the most popular being entertainment/music magazines such as *People* and news magazines such as *Time*.<sup>22</sup>

Consistent with their reliance on the internet as a source of travel information, half of Regional Canadian Aboriginal Culture Tourists say that they normally visit travel websites (50%) and slightly fewer typically watch travel shows on television (45%).

<sup>22</sup> More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover.

### Long-Haul Canadian Aboriginal Culture Tourists

Over half of Long-Haul Canadian Aboriginal Culture Tourists rely on the **advice of friends and relatives**, their own **past experience** at a destination, and/or the **internet** as a source of trip planning information.

Two-fifths use **official travel guides or brochures from provincial, state or national organizations** (*Official Travel Guides*), while over one-third obtain travel information from **maps, travel agents, newspapers, and/or visitor information centres**.

#### Summary: Top Tourism Information Sources

	Long-Haul Canadian Aboriginal Culture Tourists
Past experience	58%
Advice of friends/relatives	58%
Internet website	56%
Official travel guides	41%
Maps	37%
Travel agent	36%
Visitor information centres	36%
Newspapers	36%

With many Long-Haul Canadian Aboriginal Culture Tourists relying on the internet for travel planning and over two-fifths saying that they *normally* visit **travel websites**, the internet offers the greatest potential for reaching this market. Use of online travel information tools is more widespread than is readership of weekend or weekday travel sections in local newspapers or readership of most types of magazines. Nonetheless, two-fifths of Long-Haul Canadian Aboriginal Culture Tourists say they read entertainment magazines like *People* and/or general interest magazines such as *Harper's* or the *New Yorker*.<sup>23</sup>

<sup>23</sup> More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover.

TABLE 20: INFORMATION SOURCES FOR TRAVEL PLANNING &amp; GENERAL MEDIA HABITS

	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<b>SOURCES OF TRAVEL PLANNING INFO</b>				
Internet website	65%	56%	76%	48%
Past experience	56%	58%	75%	52%
Advice of friends/relatives	54%	58%	71%	53%
Maps	48%	37%	46%	34%
Travel agent	42%	36%	42%	34%
Visitor information centres	37%	36%	41%	33%
Official travel guides	37%	41%	50%	37%
Auto club	33%	21%	22%	20%
Any newspaper	29%	36%	44%	33%
Articles	27%	32%	37%	30%
Advertisements	12%	22%	31%	19%
Travel guide books	23%	17%	26%	13%
Any television	20%	20%	26%	18%
Programs	19%	19%	25%	17%
Advertisements	6%	8%	11%	7%
Trade, travel, sportsmen's shows	11%	10%	5%	11%
Electronic newsletters via e-mail	10%	4%	6%	3%
Travel information in mail	7%	17%	17%	18%
<b>TRAVEL MEDIA*</b>				
Frequently read newspaper Travel Section				
In weekend editions	33%	34%	43%	30%
In weekday editions	32%	28%	30%	27%
Magazines read in typical month				
Entertainment/music ( <i>People, TVGuide</i> )	39%	42%	44%	42%
News ( <i>Time, Newsweek</i> )	38%	31%	38%	28%
Science/geography ( <i>Canadian Geographic</i> )	36%	26%	24%	26%
General interest ( <i>Harper's, New Yorker</i> )	26%	40%	39%	41%
Food/cooking ( <i>Gourmet, Bon Appetit</i> )	26%	34%	33%	35%
Travel ( <i>Condé Nast, Travel &amp; Leisure</i> )	23%	16%	17%	16%
Home/garden	21%	33%	41%	30%
Normally watch Travel Shows on TV	45%	37%	31%	40%
Normally visit Travel websites	50%	44%	51%	42%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 20,30-32, 34. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade. "More information on magazine readership, television viewing, radio listening and website use is available in the detailed tabulations provided under separate cover (see Tables 30 through 33).

### 3. Internet Use for Travel Inquiries & Bookings

#### Regional Canadian Aboriginal Culture Tourists

As noted in the previous section, most Regional Canadian Aboriginal Culture Tourists rely on the internet for travel *planning*. Airline, travel planning/booking sites such as *Expedia*, followed by hotel/resort and destination marketing organization (DMO) sites are the most commonly used among those who rely on the internet for travel planning (see Table 21).

Not surprisingly, *booking* online is less common than is searching for information on the internet. Nonetheless, half of these Regional Canadian sector members claim to have made a travel-related booking online over the past two years or so (51%). Their most common online bookings are for air tickets (69%) and accommodation (68%).

#### Long-Haul Canadian Aboriginal Culture Tourists

Use of hotel/resort sites is particularly widespread among Long-Haul Canadian Aboriginal Culture Tourists who use the internet for travel *planning*. Other popular sites among these tourists include those provided by destination marketing organizations (DMOs), airlines, and travel planning/booking sites such as *Expedia* or *Travelocity*.

One-third of Long-Haul Canadian sector members say that they have made a travel-related *booking* online over the past two years or so (32%). Those who made such bookings were most apt to have reserved accommodation (79%) followed by airline tickets (68%).

\* \* \* \* \*

To reach Canadian Aboriginal Culture Tourists regardless of where in Canada they reside, the internet, print media and provision of a wonderful experience to those who come to Alberta are worthy of special note.

- Specifically, maintenance of Alberta's DMO websites and visibility on websites such as *Expedia* or *Travelocity* are essential. These tools may be somewhat more effective in reaching the Regional Canadian market than the Long-Haul Canadian market;
- Widely used print media include official printed guides from the province or its municipalities and regions, newspaper articles, and general interest magazines such as *Harper's*, or entertainment/music magazines such as *People*. These media may reach more eastern than western sector members;

- Up-to-date and prominently displayed materials at travel agencies and through auto clubs are also apt to reach Aboriginal Culture Tourists, and particularly those in western Canada;
- Sizeable minorities of eastern and western sector members rely on visitor information centres as sources of travel information;
- Creating goodwill ambassadors of the Canadian Aboriginal Culture Tourists who travel within or to Alberta is necessary to ensure that *advice of friends/relatives* is favourable and forthcoming.

TABLE 21: WEBSITE USAGE FOR TRAVEL PLANNING

	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<b>Used Internet website for travel planning, past 2 years</b>	<b>65%</b> (100%)	<b>56%</b> (100%)	<b>76%</b> (100%) <sup>1</sup>	<b>48%</b> (100%)
<b><u>Internet website(s) used</u></b> <i>(Among Users)</i>				
Airline	69%	51%	68%	40%
Travel planning/booking	68%	51%	74%	37%
Hotel/resort	57%	61%	66%	57%
Destination marketing organization (DMO)	54%	52%	54%	51%
Attraction	41%	46%	50%	43%
Cruise	7%	5%	4%	6%
Motorcoach	7%	7%	9%	6%
Other	32%	36%	42%	32%
<b>Any Internet Purchases in Past 2 Years</b> <i>(Among All Overnight Pleasure Travellers)</i>	<b>51%</b> (100%)	<b>32%</b> (100%)	<b>48%</b> (100%) <sup>2</sup>	<b>26%</b> (100%) <sup>2</sup>
<b><u>Items Purchased Online</u></b> <i>(Among Purchasers)</i>				
Air tickets	69%	68%	87%	55%
Accommodation	68%	79%	79%	79%
Package deal (2+ items)	34%	16%	11%	19%
Car rental	32%	36%	51%	26%
Tickets for activities/attractions	20%	33%	25%	39%
Rail, bus, boat tickets	18%	33%	50%	21%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 21, 22. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade. <sup>1</sup>Caution: small base size. <sup>2</sup>Caution: extremely small base size.

## **E. Other Travel-Related Information**

### **1. Use of Package Deals**

#### **Regional Canadian Aboriginal Culture Tourists**

Purchase of package deals in the past two years is relatively widespread among Regional Canadian Aboriginal Culture Tourists (see Table 22). One-fifth say they relied on a package deal for *all* or *most* of their trips over the past two years (20%) and a further 3-in-10 have used package deals for *one* or *some* of these trips (29%).

Those who purchase packages want them to include transportation to the destination and accommodation, followed by food and beverage. Comparatively few of these purchasers are interested in transportation at the destination or tickets for activities and attractions.

#### **Long-Haul Canadian Aboriginal Culture Tourists**

About 1-in-10 Long-Haul Canadian Aboriginal Culture Tourists claim to have purchased package deals for *all* or *most* of their trips in the past two years (10%). More infrequent use of package deals is characteristic of 1-in-5 of these tourists (20%, *one* or *some* of their trips).

Those who purchase packages want them to include accommodation, transportation to the destination, followed by food and beverage, transportation at the destination and tickets for activities and attractions.

TABLE 22: PACKAGE DEALS	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
<b>Frequency of Purchasing Packages in Past 2 Years</b>				
Most/all trips	20%	10%	6%	11%
One/some trips	29%	20%	24%	18%
No trips/not stated/not sure	52%	71%	70%	71%
<b>Desired Components of Packages</b> (Among Purchasers of Packages)				
	(100%)	(100%)	(100%) <sup>1</sup>	(100%) <sup>1</sup>
Accommodation	86%	89%	N/A	N/A
Transport to destination	98%	79%	N/A	N/A
Food and beverage	59%	64%	N/A	N/A
Tickets for activities/attractions	30%	48%	N/A	N/A
Transport at destination	35%	49%	N/A	N/A
Other	27%	14%	N/A	N/A

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 23. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade. <sup>1</sup>Base size too small to warrant analysis.

## 2. Benefits Sought From Pleasure Travel

Pleasure travellers were asked to indicate the importance of a variety of benefits that might be associated with pleasure travel.<sup>24</sup> The proportions of Canadian Aboriginal Culture Tourists identifying each benefit as *highly important* are provided in this section (see Table 23).

### Regional Canadian Aboriginal Culture Tourists

At the top of the list among Regional Canadian Aboriginal Culture Tourists are the trip's ability to **relieve stress**, followed by getting a **break from the day-to-day environment**, the opportunity to **see and do new/different things**, forming the basis of **lasting memories**, and **enriching familial relationships**.

#### Summary: Top Benefits Sought from Pleasure Travel

	Regional Canadian Aboriginal Culture Tourists
Relax/relieve stress	64%
Break from day-to-day environment	64%
See/do something new/different	56%
Create lasting memories	53%
Enrich relationship with partner/children	53%

Benefits with *low appeal* among these western Canadians include being **pampered** finding **solitude and isolation** and **having stories to tell** once the trip is over.

### Long-Haul Canadian Aboriginal Culture Tourists

Analogous to their western neighbours, Long-Haul Canadian Aboriginal Culture Tourists put a trip's ability to **relieve stress**, followed by getting a **break from the day-to-day environment**, the opportunity to **see and do new/different things** and forming the basis of **lasting memories** at the top of their list of benefits obtained from pleasure travel. They also include freedom from a **fixed schedule** among travel's key benefits (see summary table, following page).

Benefits with the lowest level of endorsement among these eastern Canadians include finding **solitude and isolation**, having **stories to share** once the trip is over, and **being pampered**.

<sup>24</sup> A three-point semantic scale was used: *of no importance, somewhat important, and highly important*.

**Summary: Top Benefits Sought from Pleasure Travel**

	<b>Long-Haul Canadian Aboriginal Culture Tourists</b>
Relax/relieve stress	66%
Break from day-to-day environment	65%
See/do something new/different	57%
Create lasting memories	55%
No fixed schedule	53%

**TABLE 23: BENEFITS SOUGHT FROM PLEASURE TRAVEL** (*Highly important*)

	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base				
Weighted, Projected	(236)	(343)	(107)	(236)
% Stating "Highly Important"	189,000	375,000	104,000	271,000
Relax/relieve stress	64%	66%	79%	61%
Break from day-to-day environment	64%	65%	73%	62%
See/do something new/different	56%	57%	63%	55%
Create lasting memories	53%	55%	57%	54%
Enrich relationship with partner/children	53%	46%	49%	45%
Knowledge of history, cultures, places	38%	44%	49%	42%
Enrich perspectives	38%	48%	51%	46%
No fixed schedule	36%	53%	52%	53%
Keep family ties alive	35%	43%	46%	41%
Stimulate mind/intellectual challenge	25%	38%	36%	38%
Renew personal connections (non-family)	19%	22%	33%	17%
Physical challenge	16%	28%	38%	24%
Solitude and isolation	14%	18%	28%	15%
To be pampered	13%	16%	23%	13%
Stories to share	8%	17%	18%	17%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 25. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade.

### 3. Incidence of Summer/Winter Trips

Almost all Regional and Long-Haul Canadian Aboriginal Culture Tourists say that they have taken an overnight pleasure trip during the summer months. Two-thirds of the Regional Canadian market and three-quarters of the Long-Haul Canadian market say they have taken winter trips over the past two years (see Table 24). Winter travel is particularly characteristic of *Travellers to Alberta* from eastern Canada (92%). These winter trips might include those taken for winter outdoor activities, but could also be beach holidays in Florida or the Caribbean.

TABLE 24: INCIDENCE OF SUMMER/ WINTER PLEASURE TRIPS

	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base				
Weighted, Projected	(236)	(343)	(107)	(236)
	189,000	375,000	104,000	271,000
<b>Took Overnight Pleasure Trip in Past 2 Years In . . .</b>				
Summer	97%	92%	97%	91%
Winter	66%	72%	92%	64%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 24. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade.

#### 4. Memberships in Various Organizations

##### Regional Canadian Aboriginal Culture Tourists

Auto club membership is characteristic of one-half of Regional Canadian Aboriginal Culture Tourists (see Table 25). Two-fifths are members of a frequent flyer program and one-quarter say that they belong to a sports club.

##### Long-Haul Canadian Aboriginal Culture Tourists

Over 4-in-10 Long-Haul Canadian Aboriginal Culture Tourists are auto club members, 3-in-10 belong to a frequent flyer program and one-fifth are sports club members.

TABLE 25: MEMBERSHIPS	Canadian Aboriginal Culture Tourists			
	Total Regional	Total Long-Haul	Long-Haul	
	Total	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(236)	(343)	(107)	(236)
Weighted, Projected	189,000	375,000	104,000	271,000
Auto club	51%	43%	41%	43%
Frequent flyer program	40%	29%	46%	22%
Sports club	26%	20%	31%	17%
Community service club	18%	17%	18%	16%
Hotel/car rental loyalty program	15%	12%	21%	8%
Book/reading club	10%	5%	6%	4%
Travel club	9%	8%	7%	9%
Nature/environmental club	8%	12%	14%	11%
Hobby club	5%	15%	22%	12%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 35. The Regional and Long-Haul columns include the respective Canadians 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years for the main reason of going to/participating in Aboriginal cultural activities. "Travellers to Alberta" are Long-Haul Canadian Aboriginal Culture Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "Non-Alberta Travellers" are Long-Haul Canadian Aboriginal Culture Tourists with no trips to Alberta reported over the past decade.

## F. Canadian Aboriginal Culture Tourists in 2015 and 2025

### 1. The Regional Canadian Market for Aboriginal Culture Tourism

Based on information provided by Statistics Canada, the size of the Regional Canadian Aboriginal Culture Tourism sector has been projected to two points in the future: 2015 and 2025 (see Table 26).

#### Growth in the Regional Canadian Adult Population

Between 2006 when the TAMS study was conducted and 2015, it is estimated that the combined adult population of British Columbia, Alberta, Saskatchewan and Manitoba will grow by about twelve percent, from 7.3 million adults to 8.2 million adults. A longer-term projection, from 2006 to 2025, generates an estimate of nineteen percent growth, from the current 7.3 million to approximately 8.7 million adults. These growth rates are, in effect, the benchmarks against which growth in the Regional Canadian Aboriginal Culture Tourism sector can be assessed.

#### Growth in the Regional Canadian Aboriginal Culture Tourism Sector

The Regional Canadian Aboriginal Culture Tourism market is expected to increase at an appreciably lower rate than the region as a whole in the shorter and longer terms. Specifically, the market will increase by three percent between 2006 and 2015, from 189,000 to 194,000; and by six percent between 2006 and 2025, from 189,000 to 201,000.

TABLE 26: REGIONAL PROJECTIONS TO 2015, 2025

	Number of Adults	Total Rate of Change over Current
<b>Regional Canadian Adult Population</b>		
Current	7,341,000	
2015	8,247,000	12%
2025	8,736,000	19%
<b>Regional Canadian Aboriginal Culture Tourists</b>		
Current	189,000	
2015	194,000	3%
2025	201,000	6%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volumes 1, 2, Table 49. Projections were provided by TNS Canadian Facts, based on Statistics Canada data.

## **2. The Long-Haul Canadian Market for Aboriginal Culture Tourism**

Based on information provided by Statistics Canada, the size of the Long-Haul Canadian Aboriginal Culture Tourism sector has been projected to two points in the future: 2015 and 2025 (see Table 27).

### **Growth in the Long-Haul Canadian Adult Population**

Between 2006 when the TAMS study was conducted and 2015, it is estimated that the combined adult population of Ontario, Québec and the four Atlantic provinces will grow by eleven percent, from 17.4 million adults to 19.3 million adults. A longer-term projection, from 2006 to 2025, generates an estimate of seventeen percent growth, from the current 17.4 million to approximately 20.4 million adults. These growth rates are, in effect, the benchmarks against which growth in the Long-Haul Canadian Aboriginal Culture Tourism sector can be assessed.

### **Growth in the Long-Haul Canadian Aboriginal Culture Tourism Sector**

The Long-Haul Canadian Aboriginal Culture Tourism market is expected to increase at rates similar to the region as a whole in the shorter and longer terms. Specifically, the market is projected to increase by 13% percent between 2006 and 2015, from 375,000 to 422,000; and by 21% between 2006 and 2025, from 375,000 to 455,000.

### **Growth in the Long-Haul Canadian Aboriginal Culture Tourism Sector –Travellers to Alberta**

Note that these findings should be interpreted with caution because of the small size of the Long-Haul Canadian market with Alberta travel experience. Like the sector as a whole, Long-Haul Canadian Aboriginal Culture Tourists with past experience in Alberta are expected to increase at a rate similar to the region as a whole in the shorter term, growing by 12% from 104,000 in 2006 to 116,000 in 2015. The growth rate projected from 2006 to 2025 for sector members with Alberta experience (22%) is somewhat higher than that projected for *all* Alberta travellers (15%). Thus, over the longer term, Long-Haul Canadian Aboriginal Culture Tourists are expected to increase from 104,000 in 2006 to about 127,000 by 2025.

TABLE 27: LONG-HAUL PROJECTIONS TO 2015, 2025

	Total		Travellers to Alberta	
	Number of Adults	Rate of Change over Current	Number of Adults	Rate of Change over Current
<b>Long-Haul Canadian Adult Population</b>				
Current	17,435,000		2,831,000	
2015	19,303,000	11%	3,117,000	10%
2025	20,376,000	17%	3,261,000	15%
<b>Long-Haul Canadian Aboriginal Culture Tourists</b>				
Current	375,000		104,000	
2015	422,000	13%	116,000	12%
2025	455,000	21%	127,000	22%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volumes 1, 2, Table 49. Projections were provided by TNS Canadian Facts, based on Statistics Canada data.

## IV. Appendices

### A. About the Travel Activities and Motivation Survey (TAMS)

The 2006 Travel Activities and Motivation Survey (TAMS) was sponsored by the following organizations:

Alberta Tourism, Parks, Recreation and Culture <sup>25</sup>	Ontario Tourism Marketing Partnership
Atlantic Canada Tourism Partnership	Parks Canada
Canadian Tourism Commission	Québec Ministry of Tourism
Department of Canadian Heritage	Statistics Canada
Government of Northwest Territories	Tourism British Columbia
Government of Yukon	Tourism Manitoba
Ontario Ministry of Tourism	Tourism Saskatchewan

Statistics Canada conducted the Canada portion of the study between January and June 2006. The universe under study was defined to be Canadian adults (18 years and over). The study consisted of a telephone survey using a disproportional sample of randomly generated telephone numbers in Canada's ten provinces, followed by a mailback survey among selected respondents. The overall response rate to the telephone survey was approximately 56%. Canadian adults who claimed to have taken an overnight out-of-town trip over the two years preceding the fieldwork qualified to receive the paper questionnaire. The response rate to this mailback portion of the study was about 54%. Thus, the Canadian database consists of 53,150 completed records from the telephone survey and 24,692 completed paper questionnaires.<sup>26</sup>

Survey data were weighted and projected to the Canadian adult population based on Statistics Canada Census estimates of household size, age and gender at a variety of city/province and/or regional levels in the country's ten provinces.

Research Resolutions used the TAMS Canada data files provided by TAMS partners. As such, the firm takes no responsibility for the quality of the data or the accuracy of the weighting and projection processes.

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<sup>25</sup> Formerly *Alberta Economic Development*.

<sup>26</sup> The base for all tabulations includes 24,692 Canadians who completed both the paper questionnaire and telephone interview and 7,007 who responded only to the telephone survey, for a total of 31,699 Canadian adults.

**B. Definition of Aboriginal Culture Tourists**

ATPRC'S SECTORS OF INTEREST	INDIVIDUAL ACTIVITIES
ABORIGINAL CULTURAL EXPERIENCES	
	Aboriginal cultural experiences in a remote or rural setting where you stayed for one or more nights
	Aboriginal heritage attractions (e.g., museums, interpretive centres)
	Aboriginal festivals and events (e.g., pow wows)
	Aboriginal cuisine (tasted or sampled)
	Aboriginal arts and crafts shows
	Aboriginal outdoor adventure and/or sports