

THE CANADIAN MARKET FOR CULTURAL TOURISM IN ALBERTA



TAMS

A SPECIAL ANALYSIS OF THE 2006 TRAVEL ACTIVITIES AND MOTIVATION SURVEY

The Canadian Market for Cultural Tourism 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).¹

- 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 **Cultural Tourists**.

¹ See Appendix A for a brief description of the TAMS study.

B. The Regional & Long-Haul Canadian Markets

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 tourists are divided into two distinct groups:

- **Regional Canadian Market** – Canadians who reside in British Columbia, Alberta, Saskatchewan and Manitoba;
- **Long-Haul Canadian Market** – Canadians who reside in Ontario, Québec, and the four Atlantic provinces.²

To aid the reader, this report provides common introductory sections, followed by an overview of shared characteristics of the Regional and Long-Haul Canadian Cultural Tourism markets and separate executive summaries for each of Regional and Long-Haul Canadian Cultural Tourists.

Subsequently, the reader will find stand-alone chapters, each dedicated to one of these geographically distinct groups of Canadian adults. In each chapter, summary tables display the sector in total and the subsets that have or have *not* travelled within Alberta over the past decade.³

Report Structure

- I. Introduction
- II. Executive Summaries
 - A. Overview of the Canadian Market for Cultural Tourism in Alberta
 - B. Summary: Regional Canadian Market for Cultural Tourism in Alberta
 - C. Summary: Long-Haul Canadian Market for Cultural Tourism in Alberta
- III. Regional Canadian Cultural Tourists - Detailed Findings
- IV. Long-Haul Canadian Cultural Tourists - Detailed Findings
- V. Appendices

² The TAMS Canada study was not conducted among residents of Canada's territories.

³ Because Regional Canadian Cultural Tourists include Alberta residents, those who have travelled in the province over the past decade on an overnight trip for any purpose are labelled *Travellers within/to Alberta*. In the Long-Haul Canadian Cultural Tourists analysis, these travellers are labelled *Travellers to Alberta*. Regardless of their place of residence, sector members who have not taken an overnight trip to or within Alberta for any purpose over the past ten years are labelled *Non-Alberta Travellers*.

C. Defining Canadian Cultural Tourists

This report provides information about **Canadian Cultural Tourists**. These individuals are 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 over this time period.⁴

Art galleries

Historic Sites/Buildings

- Historical replicas of cities or towns with historic re-enactments
- Historical re-enactments (as an actor)
- Well-known historic sites or buildings
- Other historic sites, monuments and buildings
- Interpretive program at a historic site or national/provincial park
- Palaeontological/archaeological sites
- Archaeological digs

Museums

- Children's museums
- General history or heritage museums
- Science or technology museums
- Military/war museums
- Curatorial tours
- Aboriginal heritage attractions

The primary focus is on Cultural Tourists as a whole within the Regional or Long-Haul Canadian market. Where there are noteworthy differences between the subset of Cultural Tourists who claim to have travelled within or to Alberta and Cultural Tourists as a whole, commentary is provided.⁵

Note to Readers

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

In other words, Canadian Cultural Tourists claim to have taken an overnight trip motivated by a cultural activity 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, Cultural Tourists may or may not have been visiting an art gallery, historic site or museum in a particular country, province or state they have visited recently for an overnight pleasure trip.

⁴ 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.

⁵ See comments above on telescoping for a two-year recall period. Since the potential for imprecision increases as the recall period increases, readers are advised to interpret the "past ten years" liberally. See Footnote #3 for comments on labelling used in this report for travellers to or within Alberta.

- Since **Regional Canadian Cultural Tourists** include Alberta residents and those in neighbouring provinces, it is not surprising that there is considerable overlap between the sector as a whole and the subset of this market that has travelled to or within Alberta over the past decade (79%). Because the two groups are largely the *same* tourists, there are minimal differences between them.
- In contrast, differences between **Long-Haul Canadian Cultural Tourists** in total and those who have been to Alberta over the past decade are more prevalent because there is comparatively little overlap between these two groups (25%).

II. Executive Summary

A. Overview of the Canadian Market for Cultural Tourism in Alberta

CULTURAL TOURISTS OCCUR AT THE SAME RATE IN EASTERN AND WESTERN CANADA.

Of course, the *number* of Canadian Cultural Tourists in the Long-Haul segment is appreciably larger than is the case in the Regional segment because Canada's population is concentrated in the east. Of the 13.5 million Canadian adult pleasure travellers residing in the Long-Haul Canadian market (Ontario, Québec and Atlantic Canada), 1.9 million fall within the Cultural Tourist segment (14%). At the Regional level, 813,000 of the 6.2 million Canadian adult pleasure travellers residing in British Columbia, Alberta, Saskatchewan and Manitoba (13%) are Cultural Tourists.

TRAVELLERS TO ALBERTA ARE MUCH MORE PREVALENT IN WESTERN CANADA.

Since Alberta's resident population is included in the Regional Canadian Cultural Tourist market, it comes as no surprise that trips to or within this province are appreciably more common among Regional Canadian Cultural Tourists than is the case among those who live in Ontario and eastward. Of the 813,000 Regional Canadian Cultural Tourists, 645,000 are travellers to or within Alberta in the past decade (79%), whereas of the 1.9 million Long-Haul Canadian Cultural Tourists, only 472,000 (25%) have been to Alberta over the past decade.

CULTURALLY-ORIENTED TOURISTS IN EASTERN AND WESTERN CANADA SHARE SIMILAR DEMOGRAPHIC CHARACTERISTICS.

Regional and Long-Haul Canadian Cultural Tourists have similar demographic and behavioural profiles. Whether they reside in the eastern or western portion of the country, these tourists look a lot like one another in terms of their ages, gender mix, education and income. Compared to Canadian travellers as a whole, the two geographically defined cultural segments are somewhat more affluent and educated, but in other respects, resemble *typical* Canadian travellers.

THEY ALSO SHARE SIMILAR CULTURAL, OUTDOOR AND ENTERTAINMENT INTERESTS.

Well-known historic sites; general history museums; other historic sites, monuments and buildings; and art galleries top the list for Regional and Long-

Haul Canadian Cultural Tourists as cultural reasons for taking an overnight pleasure trip.

Whether Regional or Long-Haul, Canadian Cultural Tourists are *multi-dimensional* tourists. They may place particular emphasis on *cultural activities* for some of their trips, but many also take trips in order to obtain a wide variety of soft outdoor, resort or lodge experiences, to enjoy local and internationally acclaimed cuisine or wine tasting, and to go to fairs and festivals.

Packaging historic sites, museums, art galleries or archaeological/palaeontological attractions *with* seasonally appropriate outdoor activities such as day hikes, wildlife viewing or alpine skiing might attract more cultural tourists to the province and encourage residents to travel more frequently within Alberta. Cultural Tourists may also appreciate assurances that they will have opportunities to shop and have fine dining experiences while on a culturally-focused trip.

REMINDE CANADIANS OF ALBERTA'S SAFETY AS A DESTINATION.

The top priorities in destination selection criteria for Regional and Long-Haul Canadian Cultural Tourists are feelings of *safety* and having *no health concerns*. Promotional materials direct to these markets might reinforce Alberta's safety and the absence of health risks.

EMPHASIZE THE UNIQUENESS AND DENSITY OF ACTIVITIES.

Regional and Long-Haul Canadian Cultural Tourists want to return home from their trips feeling that they have *seen and done something new and different*. Thus, when marketing Alberta's cultural attractions to Canadian cultural tourists, consideration might be given to a *menu* that highlights the province's unique sites and attractions.

To meet their interest in a destination offering *many things for adults to see and do*, the menu could include Aboriginal cultural events, explorations of military history and/or historical military re-enactments, general history or science museum visits that include curatorial tours, and/or side trips to archaeological or palaeontological sites. On the lighter side and to provide evening entertainment, sporting events, casinos, fireworks displays, and theatre or music performances might also be included.

ELECTRONIC MEDIA HAVE THE WIDEST REACH.

Visibility on electronic sites is essential for Alberta's cultural attractions to draw the Canadian market. For travel information and planning, the Canadian cultural market relies on websites, including those provided by hotels, Destination Marketing Organizations (DMOs), airlines, and dedicated travel planning sites such as *Expedia*, *Travelocity*.

Creating goodwill ambassadors from Regional and Long-Haul Canadian Cultural Tourists who travel to Alberta is as necessary as promotional efforts online, in print or via travel agents because most of these tourists rely on *advice of friends/relatives* for travel information. Alberta's cultural attractions and other tourism businesses need to ensure that this advice is favourable and plentiful by delivering on promises.

REGIONAL AND LONG-HAUL CANADIAN CULTURAL TOURIST MARKETS HAVE MUCH IN COMMON, BUT ARE NOT IDENTICAL.

As would be expected, a *regional* market differs from a *long-haul* one in terms of the competitive environment and in terms of the types of tourism products available within easy reach of the tourist. Such differences, similarities and other key findings for Regional and Long-Haul Canadian Cultural Tourists for Alberta are described in separate summaries and chapters devoted to each segment of the Canadian market.

B. Summary: Regional Canadian Market for Cultural Tourism in Alberta

MANY CANADIANS IN WESTERN CANADA ARE SEARCHING FOR CULTURAL TOURISM EXPERIENCES.

Regional Canadian Cultural Tourists – those who took overnight trips in the past two years *in order to* visit historic sites or re-enactments, museums, art galleries, archaeology/paleontology sites and/or park interpretive programs – represent approximately 813,000 Canadian adults who reside in British Columbia, Alberta, Saskatchewan and Manitoba, or about thirteen percent of the Regional pleasure travel market. Of these Regional Canadian Cultural Tourists, 645,000 (79%) claim to have been to Alberta over the past decade (*Travellers within/to Alberta*).

REGIONAL CANADIAN CULTURAL TOURISTS LIVE IN ALL FOUR WESTERN PROVINCES.

They are distributed across British Columbia, Alberta, Saskatchewan and Manitoba in a manner that is very similar to the adult population and to the overnight pleasure travel market as a whole. Thus, over 2-in-5 reside in British Columbia (45%), somewhat fewer live in Alberta (39%) and about 1-in-12 live in each of Saskatchewan (8%) and Manitoba (8%).

Not surprisingly, Alberta residents are somewhat over-represented among those who have taken trips in the province over the past ten years. Alberta's Cultural Tourists travelling within their own province represent close to half of the Regional Canadian market (46%). In contrast, Cultural Tourists from British Columbia are somewhat under-represented (39%) among those who have been to Alberta in the past decade compared to their share of *all* Regional Canadian Cultural Tourists (45%).

HISTORIC SITES ARE VERY POPULAR.

Of the many individual activities that could have motivated a holiday among Regional Canadian Cultural Tourists, *well-known historic sites/buildings* are the most popular. This activity is identified as the main reason for a trip by over two-fifths of the market sector (44%). *General history museums* (30%) and *other historic sites, monuments and buildings* (29%) are also widely cited as the reason for a recent overnight pleasure trip. Approximately one-fifth name *palaeontological or archaeological sites* and/or *historical replicas of cities or*

towns with re-enactments as the main reason for a recent overnight pleasure trip.⁶

ARCHAEOLOGICAL AND PALAEOONTOLOGICAL SITES ARE ESPECIALLY POPULAR AMONG TRAVELLERS WITHIN/TO ALBERTA.

For the most part, Regional Canadian Cultural Tourists who have travelled in Alberta over the past decade resemble *all* tourists in the sector in terms of the cultural activities that motivate their recent trips. Nonetheless, compared to the sector as a whole, those who have travelled within Alberta are **more** likely to take trips driven by *archaeological/palaeontological interests*, likely because of the high proportion of Albertans in the sector and their proximity to destinations such as Drumheller and attractions like the Royal Tyrrell Museum. They are also **more** likely to go to *general history, science/technology* and *military museums*, but are **less** likely to take trips with a main purpose of visiting an *art gallery* or an *Aboriginal heritage attraction*.

MEN AND WOMEN OF ALL AGES SEEK CULTURAL TOURISM EXPERIENCES.

Every age group is represented among Regional Canadian Cultural Tourists. About 1-in-10 are young adults (18 to 24 years) and one-sixth are between 25 and 34 years of age. About one-fifth are either in their mid-thirties to mid-forties or mid-forties to mid-fifties, and almost one-third are at least 55 years of age. Men and women are about equally likely to be Regional Canadian Cultural Tourists.

The age and gender profile of Regional Canadian sector members who have *not* travelled to Alberta in the past decade differs from those who have been to Alberta. Specifically, Non-Alberta Travellers are apt to be women and older western Canadians. In fact, 1-in-10 Travellers within/to Alberta are at least 65 years of age, but more than 2-in-10 of those who have *not* been to Alberta are in this age group.

REGIONAL CANADIAN CULTURAL TOURISTS ARE SOMEWHAT UP-SCALE TRAVELLERS.

They tend to be university educated, with over one-third having at least one university degree. About the same proportion claim to have an annual household income of at least \$100,000. While equal proportions of these market segments have university degrees, Travellers within/to Alberta are noticeably more likely to have annual incomes at or above \$100,000 (36%) than are Non-Alberta Travellers (15%).

⁶ Cultural Tourist sub-sectors add to more than 100% because there is duplication in the *main reasons* volunteered for overnight trips over the past two years by sector members.

NEW CANADIANS SEEM RELUCTANT TO TRAVEL IN ALBERTA.

Regional Canadian Cultural Tourists who have travelled in Alberta over the past decade are much more likely to be Canadian-born (80%) than are those who have not (57%). Put another way, more than twice as many Non-Alberta Travellers were born outside Canada (43%) than is the case among Regional Canadian Cultural Tourists who have taken trips in Alberta (20%).

If many of the Non-Alberta Travellers born outside Canada are *recent* immigrants, their likelihood of travel to Alberta can be expected to increase as their stay in Canada lengthens. If, however, they have been in Canada for a considerable length of time, their reluctance to travel in Alberta may suggest that they are not attracted to the province's cultural offerings, may not feel that Alberta is welcoming to new Canadians and/or elect to use their holiday time and budget to travel to their country of origin or other countries rather than in their adopted country.

REGIONAL CANADIAN CULTURAL TOURISTS TRAVEL IN CANADA, THE U.S. AND OTHER COUNTRIES.

Almost all of these tourists have recently travelled within Canada, with approximately three-fifths saying they took overnight pleasure trips over the past two years to Alberta and/or British Columbia destinations. Other popular Canadian destinations include Ontario and Saskatchewan, each attracting about 1-in-4 of these culturally-oriented westerners. These estimates include residents of each western province travelling *within* their own province. Approximately 1-in-3 Regional Canadian Cultural Tourists have *only* travelled within Canada for their overnight pleasure holidays over the past two years (32%).

About half of them have recently been to the U.S. (52%), with two western states – Washington (19%) and California (16%) – enjoying the greatest popularity as destinations. Led by Europe and Mexico, other countries are visited by more than 2-in-5 Regional Canadian Cultural Tourists (44%).

BRITISH COLUMBIA IS A FORMIDABLE COMPETITOR FOR REGIONAL CANADIAN CULTURAL TOURISTS.

Image, proximity, population, and product diversity all contribute to British Columbia's popularity as a pleasure travel destination among Regional Canadian Cultural Tourists. According to a rating of 9.0 on a ten-point scale, these tourists are most enthusiastic about British Columbia as an *appealing destination* for pleasure travel. Hawaii is the second most highly rated destination for overall appeal (8.1), followed closely by Alberta at 7.7. Of other

destinations rated, only California (7.4), Nova Scotia (7.3) and Prince Edward Island (7.2) approach Alberta's overall touristic appeal. Even among Travellers within/to Alberta, British Columbia's image as an *appealing destination* (9.0) surpasses Alberta's by a sizeable margin (7.9).

British Columbia also has a larger pool of culturally-oriented tourists than does Alberta, largely because more Canadians live in British Columbia than in Alberta. Currently, 7-in-10 Non-Alberta Travellers are British Columbians (71%) and over 4-in-10 of them reside in Vancouver (44%). At least some of these British Columbians are recent immigrants. They also include older, less affluent cultural tourists who may not have the social, physical or financial wherewithal to travel to Alberta's destinations or are reserving their more limited resources to travel overseas.

A SAFE DESTINATION IS A PRIORITY.

Most Regional Canadian Cultural Tourists start planning a trip with a *destination* in mind although about one-quarter start their planning with a focus on the type of vacation experience they wish to have and one-fifth begin with the activities they want to enjoy while on their trip. The destination should be *safe*, pose *no health concerns* and have *many things for adults to see and do*.

Many Regional Canadian Cultural Tourists also accord a high level of importance to *convenient access by car*, suggesting that road trips remain popular. Many of their destination choices support the importance of being able to drive to their destination. For example, they tend to travel within their own province or region and to the nearest U.S. state (e.g., Washington).

LIFESTYLE AND EASY ACCESS TO SPECTACULAR NATURAL ENVIRONMENTS CONTRIBUTE TO THE STRONG LURE OF THE OUTDOORS.

When taken as a whole, the *outdoor* activity profile of Regional Canadian Cultural Tourists suggests a mix of people. Many of them find it more comfortable to *observe* rather than *interact* with nature, while somewhat fewer are comparatively active and engaged. Outdoor activities that attract about 1-in-2 of these tourists on an *any participation* basis are limited to sunbathing or sitting on a beach, camping and going to nature parks. Two-fifths of them take trips on which they go swimming in lakes, view flora and/or fauna, see natural wonders, and/or hike as a day excursion. Other pursuits such as alpine skiing, fishing and motor boating each attracts about one-fifth of Regional Canadian Cultural Tourists.

By packaging historic sites, museums, or archaeological/palaeontological attractions *with* seasonally appropriate outdoor activities such as day hikes, wildlife viewing or alpine skiing Alberta's attractions might entice more cultural tourists from other western provinces and Alberta residents in the sector might be encouraged to travel more frequently within Alberta.

ARCHITECTURE AND PERFORMANCES ARE POPULAR TRIP ACTIVITIES.

Apart from the cultural activities used to define the market sector, Regional Canadian Cultural Tourists tend to utilize destinations' cultural, culinary and retail infrastructure as *things to see and do* while on overnight pleasure trips, rather than as the driving force behind their trips.

For example, over three-fifths have strolled around a city to observe its buildings and architecture on recent pleasure trips, but only about 1-in-3 have taken a trip in order to engage in this activity. A similar pattern is evident for attending arts performances such as live theatre.

FAIRS AND FESTIVALS, DINING AND SHOPPING ARE THINGS TO "SEE AND DO".

Over half of Regional Canadian Cultural Tourists have gone to fairs or festivals while on recent overnight pleasure trips with about one-third naming fairs/festivals as a *trip motivator*. About one-quarter say they took a trip motivated by a spectator sporting event, while close to two-fifths attended such an event as *one of many* activities on their trips. Attractions such as zoos, farmers' markets, amusement parks, casinos, free outdoor performances, botanical gardens and movies are also included as *one of many* activities on trip itineraries for at least 1-in-4 Regional Canadian Cultural Tourists.

In addition to entertainment-oriented activities, shopping, dining out at restaurants offering *local* cuisine, visiting local outdoor cafes and wine tasting are common trip experiences for Regional Canadian Cultural Tourists.

PROVIDE A MENU OF ACTIVITIES WITH AN EMPHASIS ON NEW AND DIFFERENT.

The vast array of cultural and entertainment activities engaged in by Regional Canadian Cultural Tourists attests to their eclectic and wide-ranging interests. They describe themselves as tourists who want a *break from the day-to-day* and a *stress-reducing holiday* that makes them feel that they have *seen and done something new and different*. Thus, when marketing Alberta's cultural attractions to them, consideration might be given to a *menu* that highlights the province's unique

sites and attractions. It might include Aboriginal cultural events, explorations of military history and/or historical military re-enactments, general history or science museum visits that include curatorial tours, and/or side trips to archaeological or palaeontological sites. On the lighter side and to provide evening entertainment, sporting events, casinos, fireworks displays, theatre or music performances might also be included.

THE INTERNET IS “THE” TRIP PLANNING TOOL FOR CULTURAL TOURISTS.

Two-thirds of Regional Canadian Cultural Tourists use the internet for travel information. Of the many *other* sources of print or electronic information available to them, relatively few enjoy widespread use. At the same time, over half of these tourists rely on their own past experience and/or anecdotal information provided by friends and relatives.

Use of official travel guides or brochures from provincial, state or national organizations or travel agents is characteristic of over one-third of Regional Canadian Cultural Tourists. Reliance on official travel guides is equally characteristic of those who have and have not travelled within Alberta in the past decade, but more Non-Alberta Travellers to Alberta use travel agents for information (44%) than do Travellers within/to Alberta (35%).

ALBERTA FACES AN IMAGE CHALLENGE IN THE REGIONAL CANADIAN MARKET.

As noted previously, Alberta faces stiff competition from neighbouring British Columbia. While Regional Canadian Cultural Tourists who have travelled within Alberta over the past decade rate the province more favourably (7.9) than those who have not done so (6.6), both groups rate British Columbia much more positively as an *appealing destination* (9.0, each).

Giving Alberta's cultural infrastructure a *fresh face*, particularly for the resident population, may remind them of what is available *near-to-hand* and acquaint them with new cultural products that have been developed since they last considered taking a culturally-focused trip within their own province.

THE VALUE OF THE CANADIAN DOLLAR MAY BECOME AN OBSTACLE FOR MARKET RETENTION OR GROWTH.

The appreciation of the Canadian dollar against U.S. currency is likely to increase the attractiveness of U.S. destinations for cultural pursuits by Canadians. Over half of Regional Canadian Cultural Tourists have travelled to the U.S. on an overnight pleasure trip in the past two years. In their search for *unique, new, and*

different cultural activities, they may become even more inclined to look south of the border for museums, art galleries, historic sites and palaeontological or archaeological experiences.

To counter the southern lure, focussing on the unique *culture/outdoor* combinations Alberta can offer may be useful. Cultural attractions may also find that emphasis on the *stress-free, relaxing* experience offered by travel to *nearby destinations* versus border controls and delays associated with travel to the U.S. has some caché among Regional Canadian Cultural Tourists.

C. Summary: Long-Haul Canadian Market for Cultural Tourism in Alberta

MANY CANADIANS IN EASTERN CANADA ARE SEARCHING FOR CULTURAL TOURISM EXPERIENCES.

Long-Haul Canadian Cultural Tourists – those who took overnight trips in the past two years *in order to* visit historic sites or re-enactments, museums, art galleries, archaeology/paleontology sites and/or park interpretive programs – represent approximately 1.9 million Canadian adults who reside in Ontario, Québec and the four Atlantic provinces, or about fourteen percent of the Long-Haul pleasure travel market. Of these Long-Haul Canadian Cultural Tourists, 472,000 (25%) claim to have been to Alberta over the past decade (*Travellers to Alberta*).

LONG-HAUL CANADIAN CULTURAL TOURISTS LIVE IN ALL EASTERN PROVINCES.

They are distributed across Ontario, Québec and the four Atlantic provinces in a manner that is very similar to the adult population and to the overnight pleasure travel market as a whole. Thus, 3-in-5 reside in Ontario (59%), one-third live in Québec (34%) and about 1-in-12 live in Newfoundland and Labrador, Nova Scotia, New Brunswick and Prince Edward Island (8%, combined).

HISTORIC SITES ARE VERY POPULAR.

Of the many individual activities that could have motivated a holiday among Long-Haul Canadian Cultural Tourists, *well-known historic sites/buildings* are the most popular. This activity is identified as the main reason for a trip by close to half of the market sector (46%). *General history museums* (28%); and *other historic sites, monuments and buildings* (32%) are also widely cited as the reason for a recent overnight pleasure trip. Approximately one-fifth name *historical replicas of cities or towns with re-enactments* (19%), followed by *science or technology museums* (16%) as the main reason for a recent overnight pleasure trip. *Military/war museums, palaeontological or archaeological sites* and/or *Aboriginal heritage attractions* are trip drivers for approximately 1-in-10 Long-Haul Canadian Cultural Tourists.⁷

Although not in high demand, *palaeontological or archaeological sites* are more commonly identified as a reason for taking a trip by Travellers to Alberta (14%) than by eastern Canadian cultural tourists who have *not* travelled to Alberta over the past decade (7%).

⁷ Cultural Tourist sub-sectors add to more than 100% because there is duplication in the *main reasons* volunteered for overnight trips over the past two years by sector members.

MEN AND WOMEN OF ALL AGES SEEK CULTURAL TOURISM EXPERIENCES.

Every age group is represented among Long-Haul Canadian Cultural Tourists. About 1-in-10 are young adults (18 to 24 years) and about 1-in-7 are between 25 and 34 years of age. Slightly more are in their mid-thirties to mid-forties or mid-forties to mid-fifties. Almost one-third are at least 55 years of age. Women are somewhat more likely to be Long-Haul Canadian Cultural Tourists than are men.

REGIONAL CANADIAN CULTURAL TOURISTS ARE SOMEWHAT UP-SCALE TRAVELLERS.

They tend to be university educated, with 4-in-10 having at least one university degree. Over one-quarter claim to have an annual household income of at least \$100,000. Travellers to Alberta are more likely to have high annual incomes and to be university educated than are Non-Alberta Travellers. Additionally, although most Long-Haul Canadian Cultural Tourists are Canadian-born, the market segment with *no* Alberta travel experiences over the past ten years is more apt to include immigrants (26%) than is the case among Travellers to Alberta (18%).

LONG-HAUL CANADIAN CULTURAL TOURISTS TRAVEL IN CANADA, THE U.S. AND OTHER COUNTRIES.

Almost all of these tourists have recently travelled within Canada (90%). Like their western counterparts, eastern Canadians tend to travel in their "own" region. Two-thirds have taken recent overnight pleasure trips in Ontario, one-half in Québec and about one-quarter in the Atlantic provinces, compared to about one-tenth who have ventured west to Alberta (9%) and/or British Columbia (10%). These estimates include residents of each eastern province or region travelling *within* their own region. Approximately 1-in-3 Long-Haul Canadian Cultural Tourists have *only* travelled within Canada for their overnight pleasure holidays over the past two years (32%).

Non-Canadian destinations for overnight pleasure trips in the past two years include the U.S. (51%) and, less commonly, other countries (43%). Compared to the sector as a whole, Travellers to Alberta are especially likely to have taken an overnight trip to the U.S. in the past two years (65%) and to other foreign countries (52%), most notably, to Europe and the Caribbean.

Only two *long-haul* states have attracted at least 1-in-20 of these tourists for an overnight pleasure trip in the past two years – Florida and, less commonly, California. Other popular U.S. destinations are *nearby markets* for easterners. For example, the single most popular U.S. destination – New York – borders both

Ontario and Québec. Travel to the long-haul markets such as Florida or California is more likely driven by eastern Canadians' pursuit of a winter respite than by cultural interests.

ALBERTA IS MORE SUCCESSFUL IN ATTRACTING CULTURAL TOURISTS FROM ONTARIO THAN FROM QUÉBEC.

Compared to their contributions to the sector as a whole, cultural tourists from eastern Canada who have been to Alberta over the past decade are significantly over-represented in Ontario (71% versus 59% of the total market) and significantly under-represented among Québec residents (19% versus 34% of the total market), possibly because of concerns about being able to communicate in French.

BRITISH COLUMBIA HAS A MORE FAVOURABLE IMAGE THAN DOES ALBERTA.

Alberta is rated at 7.1 on a ten-point scale for being an *appealing destination* for pleasure travel by Long-Haul Canadian Cultural Tourists, compared to 8.6 for British Columbia. Among these eastern Canadians, other destinations that surpass Alberta for appeal include Hawaii (8.1), Québec (7.9), Ontario (7.8), California (7.6) and Nova Scotia (7.4).

Even though Alberta's image as an *appealing destination* increases substantively among those who have travelled in the province over the past decade (8.1), these Travellers to Alberta rate British Columbia more favourably (9.0). Alberta has a substantive image deficit to overcome among Long-Haul Canadian Cultural Tourists who are Non-Alberta Travellers (6.6). These same Non-Alberta Travellers rate British Columbia at 8.5 on the appeal scale.

A SAFE DESTINATION IS A PRIORITY.

Most Long-Haul Canadian Cultural Tourists start planning a trip with a *destination* in mind although about one-quarter start their planning with a focus on the type of vacation experience they wish to have and one-fifth begin with the activities they want to enjoy while on their trip. The destination should be *safe*, *pose no health concerns*, *have many things for adults to see and do* and offer *convenient access by car*. Many Long-Haul Canadian Cultural Tourists' destination choices support the importance of being able to drive to their destination. For example, they tend to travel within their own province or region and to the nearest U.S. state (e.g., New York).

LONG-HAUL CANADIAN CULTURAL TOURISTS TEND TO OBSERVE RATHER THAN INTERACT WITH NATURE.

Outdoor activities that attract at least 1-in-4 of these tourists on an *any participation* basis are limited to seeing well-known wonders, going to nature parks, sunbathing or sitting on a beach, swimming in lakes or oceans, viewing flora and/or fauna, camping, hiking, and/or fishing.

Since Alberta offers superb outdoor products that coincide with many of the ones most popular among Long-Haul Canadian Cultural Tourists, packaging of Alberta's Rocky Mountain National Parks, historic sites, museums, art galleries or archaeological/palaeontological attractions *with* outdoor activities such as visits to natural wonders in the Canadian Badlands that include day hikes, wildlife viewing or camping might attract more of these eastern cultural tourists to the province. In light of its positive image, co-packaging Alberta with British Columbia could also be attractive, especially to the 1-in-4 Long-Haul Canadian Cultural Tourists who have taken organized overnight tours in the past two years.

ARCHITECTURE AND PERFORMANCES ARE POPULAR TRIP ACTIVITIES.

Apart from the cultural activities used to define the market sector, Long-Haul Canadian Cultural Tourists tend to utilize destinations' cultural, culinary and retail infrastructure as *things to see and do* while on overnight pleasure trips, rather than as the driving force behind their trips.

For example, over two-thirds have strolled around a city to observe its buildings and architecture on recent pleasure trips, but only about two-fifths have taken a trip in order to engage in this activity. A similar pattern is evident for attending arts performances such as live theatre.

FAIRS AND FESTIVALS, DINING AND SHOPPING ARE THINGS TO "SEE AND DO".

Over half of Long-Haul Canadian Cultural Tourists have gone to fairs or festivals while on recent overnight pleasure trips with about one-third naming fairs/festivals as a *trip motivator*. About one-fifth say they took a trip motivated by a spectator sporting event, while close to one-third attended such an event as *one of many* activities on their trips. Attractions such as casinos, zoos, farmers' markets, amusement parks, free outdoor performances, botanical gardens and movies are also included as *one of many* activities on trip itineraries for at least 1-in-4 of these tourists.

In addition to entertainment-oriented activities, shopping, dining out at restaurants offering *local* cuisine, visiting local outdoor cafes and wine tasting are common trip experiences for Long-Haul Canadian Cultural Tourists.

PROVIDE A MENU OF ACTIVITIES WITH AN EMPHASIS ON NEW AND DIFFERENT.

The vast array of cultural and entertainment activities engaged in by Long-Haul Canadian Cultural Tourists attests to their eclectic and wide-ranging interests. They describe themselves as tourists who want a *break from the day-to-day* and a *stress-reducing holiday* that makes them feel that they have *seen and done something new and different*.

When marketing Alberta's cultural attractions to them, consideration might be given to a *menu* that highlights the province's unique sites and attractions. It might include Aboriginal cultural events, explorations of military history and/or historical military re-enactments, general history or science museum visits that include curatorial tours, and/or side trips to archaeological or palaeontological sites. On the lighter side and to provide evening entertainment, sporting events, casinos, fireworks displays, theatre or music performances might also be included.

If a *western* touring trip, including cultural attractions available in Alberta and British Columbia (see above), were developed and marketed to Long-Haul Canadian Cultural Tourists, this touring trip might also include flora and fauna viewing in one of Alberta's national or provincial parks, along with wine tasting and/or whale watching in British Columbia.

THE INTERNET IS "THE" TRIP PLANNING TOOL FOR CULTURAL TOURISTS.

Two-thirds of Long-Haul Canadian Cultural Tourists use the internet for travel information. Of the many *other* sources of print or electronic information available to them, relatively few enjoy widespread use. Over half of these tourists, however, rely on their own past experience and/or anecdotal information provided by friends and relatives.

Use of official travel guides or brochures from provincial, state or national organizations or travel agents is characteristic of two-fifths of Long-Haul Canadian Cultural Tourists. Reliance on official travel guides is appreciably more characteristic of those who have travelled to Alberta in the past decade (50%) than those who have not done so (38%). Similarly, travellers to Alberta are more likely to use travel agents for information (43%) than are Non-Alberta Travellers (33%).

ALBERTA FACES AN IMAGE BUILDING CHALLENGE IN THE LONG-HAUL CANADIAN CULTURAL TOURIST MARKET.

Alberta could capitalize on British Columbia's image strength among Long-Haul Canadian Cultural Tourists by creating self-directed or organized tours that include cultural sites in *both* provinces. This approach to marketing Alberta's historic sites, museums, and palaeontological/archaeological attractions could be especially successful within the eastern Canadian market that has *not* travelled to Alberta in the past decade.

Soft encounters with the province's natural settings and its entertainment opportunities could be added to augment the *cultural* focus of the Alberta or Alberta/British Columbia trip.

THE VALUE OF THE CANADIAN DOLLAR MAY INCREASE CHALLENGES FOR RETENTION OR GROWTH OF THE MARKET FOR ALBERTA.

The appreciation of the Canadian dollar against U.S. currency is likely to increase the attractiveness of U.S. destinations for cultural pursuits by Canadians. Half of Long-Haul Canadian Cultural Tourists have travelled to the U.S. on an overnight pleasure trip in the past two years (51%). In their search for *unique, new, and different* cultural activities, they may become even more inclined to look south of the border for museums, art galleries, historic sites and palaeontological or archaeological experiences.

To counter the southern lure, Alberta's cultural attractions may find that focussing on the unique *culture/outdoor* combinations the province can offer has some appeal. They may also find that emphasis on the *stress-free, relaxing* experience offered by travel to less congested and possibly *friendlier* cities versus border controls and delays associated with travel to the U.S. has some caché among Long-Haul Canadian Cultural Tourists.

Attracting the Francophone Québec market may require assurances that the tourist can gather information about Alberta, enjoy cultural experiences at Alberta's attractions and obtain basic tourist services such as lodging and restaurants within the province *in French*.

III. Regional Canadian Cultural Tourists - Detailed Findings

A. Setting the Stage – Regional Canadian Travellers to Alberta

1. Market Size – All Sectors

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).

TABLE 1: OVERVIEW OF MARKET SIZE	Regional Canadian Market (British Columbia, Alberta, Saskatchewan, Manitoba)	
Unweighted base	(11,879)	
Total Adult Population*	7,341,000	
Pleasure Travellers Any Destination – Past 2 Years	6,197,000	
<u>Took Overnight Trips within/to Alberta</u>	#	%
Any purpose, past 10 years	4,546,000	73%
Any purpose, past 2 years	3,702,000	60%
Pleasure, past 2 years	3,041,000	49%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 1. Note: these figures include Alberta residents travelling within their own province. *Adults are residents 18 years of age or over.

2. Market Size – Cultural Tourists

People who take a trip *in order to* engage in cultural tourism are only a fraction of tourists who go to museums, galleries and/or historic sites and buildings while on their vacations. In fact, approximately 3.4 million Canadians in the Regional Canadian market say they have gone to these types of attractions on at least one of their trips over a two-year period (55%) (see Table 2).

Of these pleasure tourists, 813,000 claim that they took a trip *in order to* go to an art gallery, museum or historic site/building. Thus, the Regional Canadian market for Cultural Tourists represents about one-eighth of the travelling public in the four western provinces (13%). Regional Canadian Cultural Tourists who have taken an overnight trip within Alberta over the past decade (*Travellers within/to Alberta*) represent approximately 645,000 western Canadians, or one-tenth of the Regional overnight pleasure travel market as a whole. These Travellers within/to Alberta constitute four-fifths of the total Regional Canadian Cultural Tourist market (79% of 813,000 Regional Canadian Cultural Tourists).

Cultural enthusiasts – those for whom a cultural attraction is the main reason 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 cultural activities.

TABLE 2: OVERVIEW OF CULTURAL TOURISTS	Regional Canadian Pleasure Travellers Any Destination – Past 2 Years	
Unweighted base	(9,089)	
Weighted, Projected	6,197,000	
Participation in Cultural Activities on Trips		
Any	3,425,000	55%
Main Reason for Trip	813,000	13%
Took overnight trip within/to Alberta - any purpose, past 10 years	645,000	10%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 3. Note: these figures include Alberta residents travelling within their own province.

B. Market Profile: Regional Canadian Cultural Tourists

1. Market Segments

The Regional Canadian Cultural Tourist sector is composed of pleasure tourists who indicated that at least one of the following activities was the main reason for a recent trip.

- **Art galleries**
- **Historic Sites**
 - Historical replicas of cities or towns with historic re-enactments
 - Historical re-enactments (as an actor)
 - Well-known historic sites or buildings
 - Other historic sites, monuments and buildings
 - Interpretive program at a historic site or national/provincial park
 - Palaeontological/archaeological sites
 - Archaeological digs
- **Museums**
 - Children's museums
 - General history or heritage museums
 - Science or technology museums
 - Military/war museums
 - Curatorial tours
 - Aboriginal heritage attractions

Historic Site Tourists – those who go to historic buildings or sites as the main reason for taking a trip dominate the sector, representing 3-in-4 Regional Canadian Cultural Tourists. A further 1-in-2 of these travellers are *Museum Tourists*, claiming to have taken a trip in order to go to a museum (46%), and one-fifth have taken a trip to visit an *art gallery* (see Table 3).

Individual Activities

Of the many individual activities that could have motivated a holiday among Regional Canadian Cultural Tourists, *well-known historic sites/buildings* are the most popular. This activity is identified as the main reason for a trip by over two-fifths of the market sector (44%). *Other historic sites, monuments and buildings* and *general history museums* are trip drivers for 3-in-10 Regional Canadian Cultural Tourists.

Approximately 1-in-5 sector members name *art galleries, historical replicas of cities or towns with re-enactments* or *palaeontological/archaeological sites* as the main reason for a recent overnight pleasure trip. About half this proportion include

science/technology and/or *military museums* and *Aboriginal heritage attractions* among activities that motivate trips.

For the most part, Regional Canadian Cultural Tourists who have travelled in Alberta over the past decade resemble *all* tourists in the sector in terms of the cultural activities that motivate their recent trips. There are, however, several noteworthy differences. Compared to Regional Canadian Cultural Tourists as a whole, those who have travelled within Alberta over the past decade are:

- **more** likely to take trips driven by *archaeological/palaeontological interests*, likely because of the high proportion of Albertans in the sector and their proximity to destinations such as Drumheller and attractions like the Royal Tyrrell Museum⁸;
- **more** likely to go to *general history, science/technology* and *military museums*;
- **less** likely to take trips with a main purpose of visiting an *art gallery* or *Aboriginal heritage attraction*.⁹

⁸ Note that more detailed analysis of tourists motivated by archaeological sites and digs is available in a separate report dedicated to travellers who take trips in order to engage in these activities.

⁹ Note that more detailed analysis of tourists motivated by Aboriginal cultural experiences is available in a separate report dedicated to travellers who take trips in order to engage in these activities.

TABLE 3: CULTURAL ACTIVITIES AS MAIN REASONS FOR OVERNIGHT TRIPS

	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Art Galleries	21%	19%	27%
Historic Buildings/Sites	74%	75%	70%
Well-known historic sites, buildings	44%	42%	48%
Other historic sites, monuments, buildings	29%	27%	33%
Historical replicas of cities/towns with re-enactments	21%	22%	17%
Palaeontological/archaeological sites	21%	25%	8%
Interpretative program at historic site or park	8%	9%	4%
Archaeological digs	4%	5%	1%
Historical re-enactment (as an actor)	1%	2%	*
Museums	46%	48%	41%
General history museum	30%	32%	21%
Science/technology museum	12%	14%	7%
Military/war museum	11%	12%	7%
Aboriginal heritage attractions	11%	10%	16%
Children's museum	4%	4%	3%
Curatorial tours	1%	1%	1%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 2. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade. *Less than 0.5%.

2. Geographic and Demographic Characteristics

a) Place of Residence

Regional Canadian Cultural Tourists live in all four western provinces and are distributed across them in a manner that is very similar to the adult population and to the overnight pleasure travel market as a whole (see Table 4).¹⁰ Thus, over 2-in-5 reside in British Columbia (45%), somewhat fewer live in Alberta (39%) and about 1-in-12 live in each of Saskatchewan (8%) and Manitoba (8%).

Each major metropolitan area in the four provinces also contributes Regional Canadian Cultural Tourists at a rate consistent with the city's share of the region's population. Hence, as the region's largest city, Vancouver, is home to about one-quarter of Regional Canadian Cultural Tourists (26%), followed by Edmonton and Calgary at about one-eighth each, and Winnipeg and Victoria at about one-twentieth.

Not surprisingly, Alberta residents are somewhat over-represented among Regional Canadian Travellers within/to Alberta. Alberta's Cultural Tourists travelling within their own province represent close to half of the Regional Canadian market (46%). In contrast, Cultural Tourists from British Columbia are somewhat under-represented (39%) among those who have been to Alberta in the past decade compared to their share of *all* Regional Canadian Cultural Tourists (45%).

¹⁰See Detailed Tables, Volume 1, Table 42 for the distribution of the Canadian adult and pleasure travel markets by province/region.

TABLE 4: PLACE OF RESIDENCE	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
British Columbia	45%	39%	71%
Vancouver	26%	22%	44%
Victoria	5%	4%	8%
Alberta	39%	46%	15%
Calgary	11%	13%	6%
Edmonton	12%	14%	4%
Saskatchewan	8%	9%	4%
Regina	2%	2%	1%
Saskatoon	2%	2%	1%
Manitoba	8%	7%	11%
Winnipeg	5%	4%	9%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 42. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

b) Personal and Household Characteristics

Age, Gender, Household Composition

Every age group is represented among Regional Canadian Cultural Tourists. About 1-in-10 Canadians in the sector are young adults (18 to 24 years) and about one-sixth are between 25 and 34 years of age (17%) (see Table 5). One-fifth of this cultural tourist market is either between 35 and 44 years of age or between 45 and 54 years. Over one-quarter are 55 years of age or older (29%). Men and women are about equally likely to be Regional Canadian Cultural Tourists.

Most Regional Canadian Cultural Tourists live in households comprised of two adults (couples, 43%) or in families with children under 18 years of age (20%).

The age, gender and household composition profile of Regional Canadian Cultural Tourists who have taken an overnight trip to or within Alberta in the past decade is very similar to the sector as a whole. Non-Alberta Travellers are, however, older than those who have travelled in the province over the past decade. They are also more apt to be women and to live alone.

TABLE 5: AGE, GENDER, HOUSEHOLD COMPOSITION

	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Age			
18 – 24 Years	11%	11%	10%
25 – 34 Years	17%	16%	23%
35 – 44 Years	22%	25%	12%
45 – 54 Years	21%	22%	18%
55 – 64 Years	16%	17%	14%
65+ Years	13%	10%	23%
Gender			
Men	51%	52%	46%
Women	49%	48%	54%
Household Composition			
Lives alone	10%	8%	19%
Couples – no children	43%	44%	41%
Families – children under 18 years	20%	21%	17%
Families – all children 18+	11%	12%	8%
All other	14%	14%	14%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 40 and 41. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

Country of Birth, Education, Occupation, and Income

Most Regional Canadian Cultural Tourists, like *all* tourists who live in British Columbia, Alberta, Saskatchewan and Manitoba, were born in Canada (see Table 6). They differ from typical Regional tourists, however, in terms of their education and income. Generally, those in the Cultural Tourist sector are more upscale.

- They tend to be university educated, with over one-third having at least one university degree (35%) compared to about one-quarter of the general travelling public (28%); and
- Over three-in-ten claim to have annual household incomes of at least \$100,000 (32%) compared to 1-in-4 travellers in the Regional Canadian market as a whole (28%).¹¹

Like Regional travellers in total, most continue to work in the labour force (61%), although about one-sixth have retired (17%).

Regional Canadian Cultural Tourists who have travelled in Alberta over the past decade closely resemble the market as a whole. They are, however, somewhat more likely to be Canadian-born (80%) than is the Regional Canadian market (75%). In turn, Regional Canadian Cultural Tourists born in countries *other* than Canada are relatively widespread among those who have *not* been to Alberta over the past decade (43%).

If many of the Non-Alberta Travellers born outside Canada are *recent* immigrants, their likelihood of travel to Alberta can be expected to increase as their stay in Canada lengthens. If, however, they have been in Canada for a considerable length of time, their reluctance to travel in Alberta may suggest that they are not attracted to Alberta's cultural offerings, may not feel that Alberta is welcoming to new Canadians and/or elect to use their holiday time and budget to travel to their country of origin rather than in their adopted country.

Compared to Alberta Travellers within the sector (36%), Regional Canadian Cultural Tourists who have *not* travelled within Alberta in the past decade are also appreciably less likely to have household incomes of \$100,000 or more (15%). Consistent with their older ages, these Non-Alberta Travellers are also more likely to be retirees.

¹¹ See Detailed Tables, Volume 1, Tables 33 through 39 for figures.

TABLE 6: COUNTRY OF BIRTH, EDUCATION, LABOUR FORCE PARTICIPATION, INCOME	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Country of Birth			
Canada	75%	80%	57%
Other	25%	20%	43%
Education			
High school diploma or less	32%	34%	26%
Some post-secondary	12%	11%	17%
Post-secondary diploma or certificate	20%	20%	22%
University degree+	35%	36%	35%
Labour Force Participant¹			
Retirees	17%	15%	22%
Household Income			
Under \$40,000	17%	15%	24%
\$40,000 - \$59,999	17%	19%	11%
\$60,000 - \$99,999	34%	30%	50%
\$100,000+	32%	36%	15%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 36 through 39. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade. ¹"Labour force participant" includes working full-time, part-time and self-employed.

3. Competitive Destinations

a) Worldwide Destinations for Overnight Pleasure Trips

When asked to identify the destinations of the overnight pleasure trips they took over a two-year period, almost all Regional Canadian Cultural Tourists indicated that they have taken recent vacations within Canada and about one-third claim to have travelled *only* within Canada (32%) (see Table 7).

Destinations for overnight pleasure trips in the past two years among Regional Canadian Cultural Tourists as a whole and those who have taken an overnight trip to or within Alberta in the past decade are very similar. Specifically, over half have travelled in the U.S., about 1-in-5 have travelled in Europe and/or Mexico on a recent pleasure trip, and about half this proportion have taken Caribbean and/or Asian holidays.

Cultural Tourists who have *not* been to Alberta are, however, less likely than Travellers within/to Alberta to have taken trips within Canada (80% versus 93%) or to the U.S. (44% versus 54%), but are more likely to have been to destinations outside North America (52% versus 42%). As noted in the previous section, some of these tourists are immigrants and may be “going home” on their recent pleasure trips.

Note to Readers

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

In other words, Regional Canadian Cultural Tourists claim to have taken an overnight trip motivated by cultural attractions 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, Cultural Tourists may or may not have been to an art gallery, historic site, or museum in a particular country, province or state they have visited recently for an overnight pleasure trip.

TABLE 7: COMPETITIVE DESTINATIONS
WORLDWIDE

	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Canada	91%	93%	80%
Canada only	32%	33%	28%
U.S.	52%	54%	44%
Other Countries (NET)	44%	42%	52%
Europe	20%	19%	22%
Mexico	18%	20%	12%
Caribbean	11%	11%	12%
Asia	11%	8%	21%
Africa/ Australia/New Zealand	6%	3%	17%
South/Central America	6%	6%	3%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 47. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

b) Canadian Destinations

Four-fifths of Regional Canadian Cultural Tourists have had some travel experience in Alberta over a ten-year period (79%) and three-fifths (60%) have been to the province on an overnight pleasure trip in the past two years (see Table 8).

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 (76%) than is the case for the sector as a whole (60%). About half of the Regional Canadian Cultural Tourist market for Alberta are Alberta residents taking overnight pleasure trips within the province. As noted earlier, however, they may or may not have visited a heritage site, museum or archaeological dig in Alberta or any other specific destination they claim to have visited recently.

British Columbia is as popular a destination as is Alberta for Regional Canadian Cultural Tourists. It captures overnight pleasure trips from more than three-fifths of the market (64%), about on par with Alberta's share (60%). When British Columbia residents travelling within their own province are removed, this province remains as successful as Alberta in attracting *others* from the four-province region. Ontario and Saskatchewan are also popular Canadian destinations for Regional Canadian Cultural Tourists, each attracting about 1-in-4 for overnight pleasure trips in the past two years.

TABLE 8: CANADIAN DESTINATIONS*	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Alberta			
Any purpose, past 10 years	79%	100%	-
Any purpose, past 2 years	68%	85%	-
Pleasure, past 2 years	60%	76%	-
Excluding Alberta Residents	28%	35%	-
Overnight Pleasure Trips in Past 2 Years to . . .			
Atlantic Canada	8%	9%	3%
Québec	10%	11%	9%
Ontario	23%	24%	21%
Manitoba	14%	16%	7%
Excluding Manitoba Residents	10%	11%	3%
Saskatchewan	25%	29%	10%
Excluding Saskatchewan Residents	19%	22%	8%
British Columbia	64%	65%	63%
Excluding British Columbia Residents	30%	34%	13%
Yukon	3%	3%	1%
Northwest Territories	2%	2%	*

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 47. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade. *Less than 0.5%.

4. U.S. Pleasure Travel Destinations

American states competing with Alberta for the Regional Canadian Cultural 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 is most apt to draw Regional Canadian Cultural Tourists, likely because of the high proportion of these tourists who live in British Columbia. Of the sun/sea states, California is the most popular, followed at some distance by Nevada, Florida and Arizona.

TABLE 9: U.S. DESTINATIONS*	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Washington	19%	22%	10%
California	16%	16%	15%
Nevada	8%	10%	2%
Florida	7%	6%	11%
Arizona	7%	8%	2%
Montana	7%	9%	1%
Oregon	7%	8%	3%
New York State	6%	6%	5%
Idaho	6%	7%	1%
North Dakota	6%	7%	3%
Alaska	5%	4%	8%
Hawaii	5%	6%	3%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 47. *Total* includes Regional 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 visiting a cultural attraction or site. *Travellers within/to Alberta* are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade. *States displayed represent destinations visited by at least 5% of sector members.

5. Destinations: Roles & Ratings

a) Importance of Destination

Over half of Regional Canadian Cultural Tourists claim that **destination** is their first consideration in planning a recent summer and/or winter trip (see Table 10). At the same time, one-quarter start their trip planning process with a focus on the **type of vacation experience** they wish to have and one-fifth begin with the **activities** they want to enjoy while on their trip.

Western Canada's Cultural Tourists also put a premium on **destination choice** *per se*, with over 6-in-10 claiming that it is *extremely* or *very important* to them. A similar level of importance is accorded destination *per se* by the subset of these tourists with visits to Alberta over the past decade.

	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
First Consideration for Most Recent Summer/Winter Trip (NET)*			
Start with destination	55%	57%	48%
Start with type of vacation experience	25%	25%	23%
Start with activities	20%	23%	11%
Look for package deal	2%	2%	3%
Other/not stated	19%	15%	33%
Importance of Destination			
Extremely/Very Important (SUM)	63%	59%	78%
Extremely important	24%	23%	27%
Very important	39%	36%	51%
Average**	3.8	3.7	3.9

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 because 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. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural 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.¹²

On balance, Regional Canadian Cultural Tourists and Travellers within/to Alberta within the sector resemble overnight pleasure travellers as a whole in terms of the conditions they accord *high importance* when selecting a destination. Like other Regional tourists, members of this sector put *feeling safe* (63%) at the top of their list (see Table 11). Close to half of them seek a destination with *many things for adults to see and do* (46%) and a destination that poses *no health concerns* (47%). Almost 2-in-5 want *convenient access by car* to their destination (38%).¹³

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

	Regional Canadian Cultural Tourists		All Regional Canadian Pleasure Tourists
	Total	Travellers within/to Alberta	
Feeling safe	63%	62%	68%
No health concerns	47%	45%	48%
Lots for adults to see/do	46%	44%	41%
Convenient access by car (to destination)	38%	39%	40%

Close to one-third seek destinations offering *mid-range lodging* and/or *direct air access* (31%, each). About 1-in-4 Regional Canadian Cultural Tourists deem *budget lodging* and *information on the internet* important destination characteristics.

There are no substantive differences between Regional Canadian Cultural Tourists as a whole and those who have travelled in Alberta over the past decade in terms of the conditions they deem highly important in their destination choices.

¹² “Highly important”, “Somewhat important”, and “Of no importance”.

¹³ 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

	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Feeling safe	63%	62%	69%
No health concerns	47%	45%	52%
Lots for adults to see/do	46%	44%	55%
Convenient access by car (to destination)	38%	39%	35%
Mid-range accommodation	31%	31%	31%
Direct access by air (to destination)	31%	30%	35%
Budget accommodation	24%	24%	26%
Information available on internet	23%	23%	25%
Low cost packages available	19%	17%	26%
Lots for children to see/do	16%	16%	15%
Camping	16%	17%	11%
Very different culture than own	12%	11%	18%
Convenient access by train/bus (to destination)	12%	11%	18%
Familiar with culture & language	11%	9%	15%
Great shopping	8%	7%	11%
Have friends or relatives there	6%	6%	8%
Luxury accommodation	6%	4%	11%
Disabled-person-friendly	4%	3%	5%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 27. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

c) Appeal of Various Destinations

Among Regional Canadian Cultural Tourists, Alberta is rated more favourably than any other Canadian destination, with the exception of British Columbia (see Table 12).¹⁴ According to a rating of 9.0 on a ten-point scale, these tourists are most enthusiastic about British Columbia as an *appealing destination* for pleasure travel. Hawaii is the second most highly rated destination for overall appeal (8.1), followed closely by Alberta at 7.7. Of other destinations rated, only California (7.4), Nova Scotia (7.3) and Prince Edward Island (7.2) approach Alberta's overall touristic appeal.¹⁵

There are no appreciable differences between *all* Regional Canadian Cultural Tourists and those who have travelled within Alberta over the past decade in how various destinations are rated for their overall touristic appeal.

Summary: Highest Appeal Destinations among Regional Canadian Cultural Tourists

	Regional Canadian Cultural Tourists		All Regional Canadian Pleasure Tourists
	<u>Total</u>	<u>Travellers within/to Alberta</u>	
British Columbia	9.0	9.0	8.9
Hawaii	8.1	8.1	8.1
Alberta	7.7	7.9	7.4
California	7.4	7.3	7.4
Nova Scotia	7.3	7.3	7.1
Prince Edward Island	7.2	7.2	7.2

¹⁴ 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).

¹⁵ A spread of more than three tenths (0.3) between one destination and another is required to constitute a "real" difference in average ratings.

TABLE 12: APPEAL OF VARIOUS DESTINATIONS*

	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Alberta	7.7	7.9	6.6
Newfoundland & Labrador	6.8	6.8	6.9
Nova Scotia	7.3	7.3	7.4
New Brunswick	6.6	6.5	6.8
Prince Edward Island	7.2	7.2	7.3
Québec	6.6	6.5	7.1
Ontario	6.7	6.6	7.1
Manitoba	5.2	5.1	5.3
Saskatchewan	5.1	5.2	5.0
British Columbia	9.0	9.0	9.0
Yukon	6.6	6.7	6.3
Northwest Territories	6.1	6.1	5.9
Nunavut	5.2	5.2	5.2
U.S. STATES			
New York State	6.4	6.4	6.4
Colorado	6.1	6.1	6.1
Florida	6.7	6.6	6.8
California	7.4	7.3	7.5
Hawaii	8.1	8.1	7.8
Arizona	6.7	6.7	6.3

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 28. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural 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

Not too surprisingly, the *same* destinations accorded high *appeal* ratings are also the ones that emerge at the top of Regional Canadian Cultural Tourists' lists for having *many good reasons* to visit on a pleasure trip (see Table 13).¹⁶ Specifically, British Columbia tops the list with 8-in-10 stating that there are many good reasons to go to this province. About half of Regional Canadian Cultural Tourists state that there are *many good reasons* to travel in Alberta (51%), putting this province at about parity with Hawaii and California, and well ahead of all other destinations rated.

Experience with Alberta's tourism infrastructure increases Regional Canadian Cultural Tourists' perceptions of the province. Appreciably more tourists who have travelled within the province over the past decade claim that there are *many good reasons* to visit (56%) than is the case among those who have not been to Alberta (32%).

At the same time, there are no appreciable differences between the impressions of Alberta within the Regional *cultural tourist* market (51%) and Regional *pleasure* tourists as a whole (48%).

Summary: Highest Rated Destinations among Regional Canadian Cultural Tourists

	Regional Canadian Cultural Tourists		All Regional Canadian Pleasure Tourists
	<u>Total</u>	<u>Travellers within/to Alberta</u>	
British Columbia	82%	83%	80%
Hawaii	56%	57%	56%
Alberta	51%	56%	48%
California	50%	50%	48%
Nova Scotia	39%	40%	32%

¹⁶ 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*.

TABLE 13: NUMBER OF REASONS TO VISIT
VARIOUS DESTINATIONS

	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
<i>% stating MANY good reasons to visit destination</i>			
Alberta	51%	56%	32%
Newfoundland & Labrador	33%	34%	28%
Nova Scotia	39%	40%	33%
New Brunswick	26%	26%	25%
Prince Edward Island	35%	37%	27%
Québec	33%	33%	34%
Ontario	31%	30%	33%
Manitoba	12%	12%	13%
Saskatchewan	12%	13%	10%
British Columbia	82%	83%	75%
Yukon	28%	29%	25%
Northwest Territories	20%	21%	15%
Nunavut	13%	13%	12%
U.S. STATES			
New York State	31%	30%	32%
Colorado	21%	22%	18%
Florida	35%	36%	32%
California	50%	50%	51%
Hawaii	56%	57%	52%
Arizona	29%	30%	22%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 29. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural 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*.¹⁷

As noted previously, Regional Canadian Cultural Tourists claim to have taken an overnight trip motivated by a cultural activity in the past two years or so and to have taken pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited. Nonetheless, it is reasonable to assume that some of the historic sites, art galleries, museums or archaeological digs that have motivated trips among those who have been to Alberta over the past decade are located in 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* Regional Canadian Cultural Tourists to take overnight pleasure trips (*main reason*) and the level of *any* participation in these same activities.

¹⁷ 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 Canadian Cultural 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).¹⁸

- In addition to taking trips in order to go to historic sites or buildings, museums, or art galleries, two-thirds of these Canadians take trips in order to engage in at least one **land-based outdoor activity** such as camping, hiking, bird watching or viewing land-based animals.
- Over half have taken recent overnight pleasure trips in order to stay in a resort or lodge (**lodging**) and/or to engage in a **water-based outdoor activity** including fishing, diving, snorkelling, river rafting and canoeing.
- **Fairs and festivals, culinary experiences, and/or theme parks** and other similar types of entertainment are trip motivators for about 1-in-3 Regional Canadian Cultural Tourists.
- At least one-quarter of these tourists say they have taken holidays to go to **spectator sporting events** such as professional hockey or football games or to engage in other **outdoor winter activities**, such as skiing.
- **Shopping** is a primary trip driver for about one-fifth of Regional Canadian Cultural Tourists.

Because most Regional Canadian Cultural Tourists have travelled within Alberta in the past decade, there are not substantive differences in the types of activities that motivate trips for the market as a whole versus those with Alberta tourism experiences.

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 virtually every major activity group. For example, more Regional Canadian Cultural Tourists *participated* in at least one land-based outdoor activity while on a recent overnight pleasure trip (86%) than claim to have taken a trip motivated by one of these activities (66%). The most dramatic shifts are associated with dining and shopping. Food and wine experiences are, in effect, “one-of-many” trip activities for

¹⁸ For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

almost all Regional Canadian Cultural Tourists (87%), but the driving force behind a trip for many fewer segment members (31%). Similarly, 8-in-10 Regional Canadian Cultural Tourists say that they went shopping on a recent trip, but only about 1-in-4 of them took the trip *in order to shop*.

* * * * *

These findings suggest that to attract Regional Canadian Cultural Tourists to Alberta or to travel more frequently within the province, tourism marketers and packagers might take into account the following:

- Regional Canadian Cultural Tourists are *multi-dimensional* tourists.
- They may place particular emphasis on *cultural 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 cultural 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 Canadian Cultural Tourists may require assurances that they will have opportunities to shop and have fine dining experiences while on a culturally-focussed trip.

TABLE 14: MAJOR ACTIVITY GROUPS
- MAIN & ANY

	Regional Canadian Cultural Tourists			
	Total		Travellers within/to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,149)	(1,149)	(925)	(925)
Weighted, Projected	813,000	813,000	645,000	645,000
Historic Sites/Buildings	71%	83%	71%	83%
Outdoor Land-Based Activities	66%	86%	68%	89%
Lodging (Lodges, Resorts, etc.)	56%	83%	56%	84%
Outdoor Water-Based Activities	54%	75%	55%	78%
Museums	39%	69%	41%	71%
Fairs/Festivals	35%	52%	32%	50%
Food & Wine	31%	87%	27%	85%
Theme/Amusement Parks/Movies (Entertainment)	30%	55%	30%	58%
Spectator Sports	27%	38%	28%	38%
Outdoor Winter Activities	27%	35%	30%	37%
Shopping	23%	82%	22%	83%
Art Galleries	21%	42%	19%	42%
Performing Arts	16%	34%	15%	35%
Aboriginal Culture/Events	15%	30%	14%	29%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination.

b) Individual Trip Activities: The Outdoors

When taken as a whole, the *outdoor* activity profile of Regional Canadian Cultural Tourists suggests a mix of people, many of whom find it more comfortable to *observe* rather than *interact* with nature and somewhat fewer who are comparatively active and engaged (see Table 15).¹⁹ Outdoor activities that attract about 1-in-2 of these tourists on an *any participation* basis are limited to sunbathing or sitting on a beach, camping and going to nature parks. Two-fifths of them take trips on which they go swimming in lakes, view flora and/or fauna, see natural wonders, and/or hike as a day excursion. Of these activities, camping and visiting a nature park are most apt to be trip drivers (*main activity*).

Alpine skiing attracts about one-fifth of Regional Canadian Cultural Tourists as a trip driver (18%, main) and is equally common as one of the activities these western Canadians engage in on their holidays (21%, any). Fishing and motor boating are about as popular as downhill skiing as one of the activities Regional Canadian Cultural Tourists engage in while travelling (*any*).

The outdoor activity profiles for *all* Regional Canadian Cultural Tourists and those with trips in Alberta over the past decade are almost identical, largely because of the high level of overlap between the two groups.

* * * * *

Lifestyle and easy access to some of Canada's most spectacular natural environments likely contribute to the strong lure of the outdoors among Regional Canadian Cultural Tourists.

Thus, packaging historic sites, museums, or archaeological/palaeontological attractions *with* seasonally appropriate outdoor activities such as day hikes, wildlife viewing or alpine skiing might attract more cultural tourists to the province and encourage residents to travel more frequently within Alberta.

¹⁹ 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 & ANY*

	Regional Canadian Cultural Tourists			
	Total		Travellers within/to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,149)	(1,149)	(925)	(925)
Weighted, Projected	813,000	813,000	645,000	645,000
Camping	35%	52%	38%	57%
Public campground	29%	43%	31%	47%
Private campground	12%	29%	14%	32%
Wilderness campsite	11%	18%	13%	20%
Nature parks	33%	49%	35%	50%
Sunbathing or sitting on a beach	27%	55%	26%	56%
Well-known natural wonders	26%	41%	25%	42%
Alpine skiing	18%	21%	20%	23%
Flora/fauna viewing	16%	42%	17%	45%
Wildlife viewing – land-based animals	10%	28%	11%	31%
Whale watching	7%	19%	9%	21%
Wildflowers/flora	7%	19%	8%	21%
Bird watching	6%	19%	7%	20%
Hiking – Day excursions	15%	41%	16%	45%
Swimming in lakes	14%	43%	14%	46%
Fishing	13%	25%	14%	27%
Swimming in oceans	10%	34%	9%	36%
Motor boating	9%	23%	9%	26%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. *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, Regional Canadian Cultural Tourists take trips *in order to* engage in various historical and cultural activities such as seeing historic sites and buildings, and going to museums or art galleries. They are also motivated to take trips in order to see cities' architecture (37%), and to a lesser degree, to attend live theatre and other arts performances (16%) (see Table 16).

In addition to these culturally-oriented activities, the majority of Regional Canadian Cultural Tourists have recently taken overnight pleasure trips with an entertainment focus (62%). The most popular entertainment trip drivers include fairs or festivals (35%), spectator sporting events (27%) and amusement parks (16%). These, along with many other entertainment activities, are more apt to constitute *things to see and do* than the *motivation* for overnight trips.²⁰

Culture – Any Participation

Even more Regional Canadian Cultural Tourists engage in the cultural activities used to define the sector as “one-of-many” trip activities than are motivated to take overnight pleasure trips in order to engage in these activities. For example, over 2-in-5 have taken a trip primarily to visit a *well-known historic site* (44%, main), but more than 3-in-5 have gone to such a site on a recent holiday (64%, any). Similarly, 1-in-5 took trips primarily to visit an *art gallery* while 2-in-5 went to an art gallery as one of their activities on a recent trip. *Strolling around a city to observe its buildings and architecture* (37%, main) is especially popular as a trip activity (64%, any). The same increase in enthusiasm is evident for visiting *museums* as one activity on a trip planned for a different main reason. Practically twice as many Regional Canadian Cultural Tourists say they go to museums dedicated to general history, science/technology, military history or Aboriginal heritage as claim that these attractions constitute the *main reason* for a trip.

Entertainment – Any Participation

As noted above, most Regional Canadian Cultural Tourists have taken overnight pleasure trips in order to engage in various entertainment activities (62%, main) and almost all have participated in such activities on recent holidays (92%, any). Fairs and festivals including fireworks displays, spectator sporting events, farmers' markets and movies, followed by zoos, amusement parks, free outdoor performances, casinos, and botanical gardens are particularly popular *things to see and do* while on overnight holidays (*any participation*).

* * * * *

- The vast array of cultural and entertainment activities engaged in by Regional Canadian Cultural Tourists attests to their eclectic and wide-ranging interests.

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

They describe themselves as tourists who want a *break from the day-to-day* and a *stress-reducing holiday* that makes them feel that they have *seen and done something new and different*.²¹ Thus, when marketing Alberta's cultural attractions to them, consideration might be given to a *menu* that highlights the province's unique sites and attractions.

- The menu concept might convey to potential Regional Canadian Cultural Tourists that Alberta offers *many things for adults to see and do* – a highly important factor in destination selection for almost half of these tourists.²²
- Such a menu might include Aboriginal cultural events, explorations of military history and/or historical military re-enactments, general history or science museum visits that include curatorial tours, and/or side trips to archaeological or palaeontological sites.
- On the lighter side and to provide evening entertainment, sporting events, casinos, fireworks displays, theatre or music performances might also be included on the menu.

²¹ See Section III.E.2: *Benefits Sought From Pleasure Travel* for details.

²² See Section III.B.5.b: *Importance of Conditions in Destination Choice* for details.

TABLE 16: INDIVIDUAL CULTURAL/ENTERTAINMENT ACTIVITIES – MAIN & ANY*

	Regional Canadian Cultural Tourists			
	Total		Travellers within/to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,149)	(1,149)	(925)	(925)
Weighted, Projected	813,000	813,000	645,000	645,000
Cultural Activities				
Historic sites/buildings (any)	71%	83%	71%	83%
Historic sites – well-known	44%	64%	42%	64%
Historic sites – other	29%	52%	27%	52%
Historic replicas with re-enactments	21%	32%	22%	35%
Palaeontological/archaeological sites	21%	29%	25%	33%
Strolling around a city to see architecture	37%	64%	31%	61%
Art galleries	21%	42%	19%	42%
Museums (any)	39%	69%	41%	71%
General history museum	30%	58%	32%	60%
Science/technology museum	12%	23%	14%	24%
Military/war museum	11%	21%	12%	21%
Aboriginal heritage attractions	11%	22%	10%	21%
Performing Arts (any)	16%	34%	15%	35%
Live theatre performances	8%	21%	8%	23%
Entertainment	62%	92%	60%	93%
Spectator sporting events (any)	27%	38%	28%	38%
Fairs/Festivals	35%	52%	32%	50%
Fireworks displays	12%	23%	11%	23%
Amusement parks	16%	29%	16%	30%
Exhibitions or fairs	14%	24%	13%	23%
Zoos	13%	30%	15%	33%
Farmers' markets or country fairs	12%	33%	13%	33%
Casinos	11%	27%	10%	27%
Movies/cinema	11%	41%	11%	42%
Free outdoor performances	11%	29%	9%	29%
Botanical gardens	10%	26%	11%	25%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. *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.

d) Individual Trip Activities: Lodging, Food/Wine, Shopping

Lodging

Resorts, including seaside, lakeside and mountain or ski resorts, drive trips for one-third of Regional Canadian Cultural Tourists (34%, main) and are used for lodging by almost twice as many (61%, 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 motivated by other activities (5% *main*; 11% *any*).

Food & Wine

Collectively, food and wine activities drive trips for 3-in-10 Regional Canadian Cultural Tourists. Individually, dining out at restaurants offering *local* ingredients and cuisine, visiting local outdoor cafes, dining at internationally acclaimed 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, including those who have travelled within Alberta in the past decade.

Shopping

Shopping for apparel, books or music, and local arts and crafts is a common trip pastime for Regional Canadian Cultural Tourists and the subset with trips to Alberta over the past decade, but tends not to be the motivation for recent overnight pleasure travel.

* * * * *

Shopping and dining experiences are clearly in high demand among Regional Canadian Cultural Tourists as one of the many activities they engage in at a destination. Thus, culturally-oriented 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.

This market may also respond to a ski, mountain or lakeside resort experience combined with one or more cultural activities.

TABLE 17: OTHER ACTIVITIES – MAIN & ANY*	Regional Canadian Cultural Tourists			
	Total		Travellers within/to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(1,149)	(1,149)	(925)	(925)
Weighted, Projected	813,000	813,000	645,000	645,000
Lodging (NET)**	56%	83%	56%	84%
Resorts/Spas	34%	61%	32%	61%
Seaside resort	17%	33%	16%	32%
Lakeside resort	15%	29%	15%	31%
Ski/mountain resort	13%	24%	14%	26%
Wilderness/remote lodge	5%	11%	5%	13%
Food & Wine	31%	87%	27%	85%
Dining – restaurants offering local ingredients and recipes	16%	71%	13%	72%
Local outdoor cafes	9%	58%	8%	59%
Wineries – day tours/tastings	8%	24%	8%	22%
Dining – other high end restaurants	8%	32%	6%	32%
Dining – high end restaurants with international reputation	5%	23%	5%	23%
Shopping	23%	82%	22%	83%
Clothing, shoes, jewellery	14%	62%	14%	62%
Local arts & crafts studios	12%	57%	10%	58%
Bookstores or music stores	11%	52%	9%	52%
Gourmet foods	8%	27%	6%	27%
Antiques	7%	38%	7%	39%
Greenhouse or garden centre	7%	30%	7%	31%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "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.

e) Overnight Cruises & Organized Group Tours

Almost one-fifth of Regional Canadian Cultural Tourists have recently been overnight cruise passengers (18%) (see Table 18). Cruises are noticeably more popular among Non-Alberta Travellers (32%) than among those who have travelled in Alberta over the past decade (15%).

Overnight touring is characteristic of close to half of Regional Canadian Cultural Tourists (46%). Somewhat fewer tour participants claim to have taken an **organized** overnight group tour (23%) than to have taken **self-directed** touring trips over a two-year period (31%). Those who have gone on an overnight organized tour do not display a strong preference for tours to *single* versus *multiple* destinations.

Taking a day tour while on an overnight trip is more characteristic of Regional Canadian Cultural Tourists (63%) than is taking any type of overnight tour (46%). Favoured themes for organized day excursions include tours around the countryside or a city, followed by sightseeing cruises, and wilderness or outdoor tours. These same themes are popular among Regional Canadian Cultural Tourists who take *self-directed* day touring excursions.²³

²³ See Detailed Tabulations, Volume 2, Table 15 for figures.

TABLE 18: CRUISES/GROUP TOURS	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Took any overnight cruise in past 2 years	18%	15%	32%
Overnight Touring (NET)	46%	46%	45%
Organized Tour	23%	23%	21%
Multiple Locations	16%	16%	18%
Single Location	11%	12%	8%
Self-Directed Touring	31%	31%	32%
Same-Day Touring on Overnight Trip (NET)	63%	65%	52%
Self-Directed Touring	47%	49%	40%
Organized Excursion	37%	38%	35%
Type of Organized Day Tour			
<i>Among Organized Day Tour Takers</i>	(100%)	(100%)	(100%)
Countryside	58%	57%	64%
City	54%	51%	63%
Sightseeing cruise (day excursion)	40%	39%	43%
Wilderness/outdoor	39%	41%	29%
Wineries	17%	19%	11%
Factory	16%	17%	10%
Casino	15%	12%	29%
Airplane/helicopter (pilot or passenger)	14%	12%	25%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 14/16. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

D. Trip Planning

1. Who Does the Planning?

Almost all Regional Canadian Cultural Tourists and the segment of these tourists who have travelled in Alberta over the past decade 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 culture enthusiast or is shared with other household member(s).

TABLE 19: TRAVEL PLANNING	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Frequency of personal involvement in trip planning, past 2 years			
All	68%	69%	63%
Most	17%	17%	19%
Some	9%	9%	8%
None/not stated	6%	5%	11%
Main responsibility for trip planning			
Respondent	37%	38%	33%
Shared with other household member(s)	32%	34%	25%
Spouse/partner	14%	13%	17%
Other/not stated/not involved in travel planning	17%	15%	25%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 18/19. "Total" includes all sector members 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years. "Travellers within/to Alberta" are sector members 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 sector members with no trips to Alberta reported over the past decade.

2. Travel Information Sources & Travel Media

Of the many travel information sources available, relatively few enjoy widespread use among Regional Canadian Cultural Tourists apart from the internet, past experience, personal connections and maps. The **internet** tops the chart for these tourists (67%) (see Table 20). Three-fifths use anecdotal information provided by **friends and relatives** and about half rely on their own **past experience** and/or **maps** among their sources of travel information.

Use of a **travel agent, official travel guides or brochures from provincial, state or national organizations** (*Official Travel Guides*), **visitor information centres** or **newspaper** is characteristic of about 1-in-3 Regional Canadian Cultural Tourists.

Non-Alberta Travellers in the sector place less reliance on their own past experience, advice of friends and relatives and auto clubs, but more reliance on travel agents than do Regional Canadian Cultural Tourists who have travelled within Alberta over the past decade.

With most Regional Canadian Cultural Tourists relying on the internet for travel planning and about one-half saying that they *normally* visit **travel websites**, the internet offers the greatest potential for reaching this market in.

Use of online travel information tools is appreciably more widespread than is readership of weekend or weekday travel sections in local newspapers or readership of most types of magazines. Nonetheless, about 3-in-10 Regional Canadian Cultural Tourists claim regular readership of weekend travel sections in the local paper, news, entertainment/music and/or science/geography magazines such as *Canadian Geographic* and slightly more say they read general interest magazines such as *Harper's* or the *New Yorker* in a typical month.²⁴

²⁴ 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 & GENERAL MEDIA HABITS

	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
SOURCES OF TRAVEL PLANNING INFO			
Internet website	67%	67%	65%
Advice of friends/relatives	61%	64%	47%
Past experience	53%	56%	43%
Maps	48%	49%	41%
Travel agent	37%	35%	44%
Official travel guides	36%	36%	36%
Visitor information centres	34%	35%	30%
Any newspaper	33%	34%	28%
Articles	29%	31%	21%
Advertisements	17%	16%	17%
Travel guide books	27%	29%	22%
Auto club	24%	27%	16%
Any television	15%	16%	11%
Programs	13%	14%	9%
Advertisements	5%	5%	5%
Travel information in mail	10%	10%	9%
Electronic newsletters via e-mail	7%	8%	4%
Trade, travel, sportsmen's shows	7%	8%	3%
TRAVEL MEDIA*			
Frequently read newspaper Travel Section			
In weekday editions	26%	25%	28%
In weekend editions	29%	28%	32%
Magazines read in typical month			
General interest (<i>Harper's, New Yorker</i>)	38%	38%	35%
News (<i>Time, Newsweek</i>)	31%	30%	37%
Entertainment/music (<i>People, TVGuide</i>)	30%	29%	32%
Science/geography (<i>Nat'l Geographic</i>)	30%	31%	27%
Home/garden	27%	27%	29%
Food/cooking (<i>Gourmet, Bon Appetit</i>)	25%	24%	28%
Travel (<i>Condé Nast, Travel & Leisure</i>)	18%	17%	21%
Normally watch Travel Shows on TV	40%	39%	44%
Normally visit Travel websites	51%	53%	44%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 20,30-32, 34. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural 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

As noted in the previous section, most Regional Canadian Cultural Tourists rely on the internet for travel *planning*. Hotel/resort and airline sites are the most commonly used among the tourists who rely on the internet for travel planning (see Table 21). Other sites used by more than 1-in-2 internet users include destination marketing organization (DMO) and travel planning sites such as *Expedia* or *Travelocity*. Close to 1-in-2 internet users also visit attraction sites.

Possibly because they are more reliant on travel agents as a source of information, Non-Alberta Travellers within the sector are noticeably less apt to visit *airline*, *travel planning/booking* and *attraction* websites than are those who have taken trips in Alberta over the past ten years.

Not surprisingly, *booking* online is less common than is searching for information on the internet. Nonetheless, close to half of Regional Canadian Cultural Tourists claim to have made a travel-related booking online over the past two years or so (48%). As their website preferences would suggest, the most common online bookings are for accommodation and air tickets and, to a lesser degree, car rentals and activity/attraction tickets.

* * * * *

Encouraging Regional Canadian Cultural Tourists to travel more frequently in the province and encouraging those who are Non-Alberta Travellers to visit Alberta may require somewhat different media strategies.

- Visibility on electronic sites is essential for both Travellers within/to Alberta and Non-Alberta Travellers. Alberta's DMO websites are more apt to be sought by Non-Alberta Travellers than are sites such as *Expedia* or *Travelocity*;
- Travel agents may figure more prominently in reaching Non-Alberta Travellers than Travellers within the sector;
- Creating goodwill ambassadors from Regional Canadian Cultural Tourists who travel in Alberta is necessary to ensure that *advice of friends/relatives* is favourable and forthcoming, particularly to encourage Travellers within/to Alberta to travel more frequently in the province.

TABLE 21: WEBSITE USAGE FOR TRAVEL PLANNING	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Used Internet website for travel planning, past 2 years	67% (100%)	67% (100%)	65% (100%)
<u>Internet website(s) used</u> <i>(Among Users)</i>			
Hotel/resort	66%	67%	61%
Airline	61%	65%	46%
Destination marketing organization (DMO)	54%	54%	51%
Travel planning/booking	52%	55%	42%
Attraction	46%	50%	31%
Cruise	9%	10%	7%
Motorcoach	5%	6%	1%
Other	31%	31%	33%
Any Internet Purchases in Past 2 Years <i>(Among All Overnight Pleasure Travellers)</i>	48% (100%)	48% (100%)	47% (100%)
<u>Items Purchased Online</u> <i>(Among Purchasers)</i>			
Air tickets	81%	86%	65%
Accommodation	77%	77%	75%
Car rental	36%	37%	32%
Tickets for activities/attractions	28%	30%	24%
Rail, bus, boat tickets	21%	20%	25%
Package deal (2+ items)	18%	21%	6%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 21, 22. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

E. Other Travel-Related Information

1. Use of Package Deals

Purchase of package deals in the past two years is relatively uncommon among Regional Canadian Cultural Tourists (see Table 22). Only about 1-in-20 say they relied on a package deal for *all* or *most* of their trips over the past two years (6%) and a further 1-in-4 have used package deals for *one* or *some* of these trips (27%).

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

TABLE 22: PACKAGE DEALS	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Frequency of Purchasing Packages in Past 2 Years			
Most/all trips	6%	5%	8%
One/some trips	27%	26%	33%
No trips/not stated/not sure	67%	69%	59%
Desired Components of Packages (Among Purchasers of Packages)			
Accommodation	91%	91%	94%
Transport to destination	90%	89%	94%
Transport at destination	54%	58%	40%
Food and beverage	53%	59%	33%
Tickets for activities/attractions	50%	48%	56%
Other	19%	17%	25%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 23. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

2. Benefits Sought From Pleasure Travel

A cluster of benefits for taking pleasure or vacation trips tops the list among Regional Canadian Cultural Tourists (see Table 23).²⁵ Approximately 6-in-10 include each of the following among key benefits of a holiday:

- **break from the day-to-day environment**
- the trip's ability to **relieve stress**
- an opportunity **to see and do different things**
- the basis of lasting **memories**
- help **enrich familial relationships**

About two-fifths want to **abandon a fixed schedule**; expand their **knowledge of history, other cultures and other places**; **keep family ties alive** and/or **enrich their perspectives**.

Compared to Travellers within/to Alberta, those who have not visited the province over the past decade are less apt to want a holiday to create lasting **memories** or **keep family ties alive**, but are noticeably more likely to view **enriching their perspectives**, finding **intellectual challenges** and/or **renewing personal connections** as important benefits of pleasure travel.

Benefits with *low appeal* to Regional Canadian Cultural Tourists include **being challenged physically, having stories to tell** once the trip is over, finding **solitude and isolation** and **being pampered**.

* * * * *

From a marketing perspective, Regional Canadian Cultural Tourists might be reminded that Alberta has *unique* and *out-of-the-ordinary* cultural attractions and events that can be experienced in a relaxed and stress-free way. These tourists, and most particularly those who have been to the province, want their trip to be *memorable*, to represent cultural experiences they would not have elsewhere.

Emphasizing the learning aspects of cultural experiences available in Alberta might help attract Regional tourists who have *not* travelled in the province over the past decade.

²⁵Consumers were asked to indicate the importance they attach to a variety of possible *benefits* from pleasure travel using a three-point semantic scale ranging from *of no importance* to *highly important*. The figures presented in this section are the proportion of tourists who claim a benefit is *highly important*.

- Remember that many Regional Canadian Cultural Tourists, and especially those who have not been to Alberta over the past decade, are world-travellers. They can or have seen historic sites, art galleries, and museums in the U.S., Europe, Asia and other regions around the globe.
- Thus, Alberta should focus on the elements that make its cultural experiences “special”, whether because the museum or gallery offers a unique experience in its own right or because the tourist can enjoy the cultural experience in the context of outdoor activities – activities that are both widely appreciated by Regional Canadian Cultural Tourists and widely available in Alberta.

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

	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
<i>% Stating “Highly Important”</i>			
Break from day-to-day environment	64%	65%	60%
Relax/relieve stress	63%	64%	58%
See/do something new/different	59%	57%	65%
Create lasting memories	58%	61%	50%
Enrich relationship with partner/children	57%	57%	57%
No fixed schedule	43%	46%	34%
Knowledge of history, cultures, places	43%	44%	41%
Keep family ties alive	40%	41%	32%
Enrich perspectives	40%	38%	48%
Stimulate mind/intellectual challenge	27%	25%	33%
Renew personal connections (non-family)	20%	19%	26%
Physical challenge	17%	16%	18%
Stories to share	13%	12%	17%
Solitude and isolation	11%	11%	10%
To be pampered	9%	9%	8%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 25. “Total” includes Regional 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 visiting a cultural attraction or site. “Travellers within/to Alberta” are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

3. Incidence of Summer/Winter Trips

Almost all Regional Canadian Cultural Tourists say that they have taken an overnight pleasure trip during the summer months and at least 2-in-3 have taken winter trips (see Table 24). Winter travel is particularly characteristic of Travellers within/to Alberta. These winter trips might include those taken for winter outdoor activities such as alpine skiing, but also might include cruises to the Caribbean or beach holidays in Florida.

	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Took Overnight Pleasure Trip in Past 2 Years			
In . . .			
Summer	93%	93%	92%
Winter	68%	72%	52%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 24. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

4. Memberships in Various Organizations

Auto club membership is characteristic of almost 1-in-2 Regional Canadian Cultural Tourists (see Table 25). About 2-in-5 are members of a frequent flyer program while more than 1-in-4 belong to a sports club. Auto club membership is more characteristic of Travellers within/to Alberta (49%) than among those who have not travelled within the province over the past decade (38%). This finding is consistent with the increased reliance on auto clubs as a source of tourism information among Regional Canadian Cultural Tourists who have travelled in Alberta during the past ten years.

Although not prominent in either subset, memberships in hotel or car rental loyalty programs are more common among Travellers within/to Alberta than they are among Non-Alberta Travellers.

TABLE 25: MEMBERSHIPS	Regional Canadian Cultural Tourists		
	Total	Travellers within/to Alberta	Non-Alberta Travellers
Unweighted base	(1,149)	(925)	(224)
Weighted, Projected	813,000	645,000	167,000
Auto club	47%	49%	38%
Frequent flyer program	39%	39%	38%
Sports club	28%	28%	25%
Community service club	15%	16%	11%
Hotel/car rental loyalty program	14%	16%	7%
Book/reading club	9%	10%	5%
Hobby club	6%	6%	3%
Nature/environmental club	5%	6%	4%
Travel club	4%	5%	2%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 35. "Total" includes Regional 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 visiting a cultural attraction or site. "Travellers within/to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

F. Regional Canadian Cultural Tourists in 2015 and 2025

Based on information provided by Statistics Canada, the size of the Regional Canadian Cultural 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 Cultural Tourism sector can be assessed.

Growth in the Regional Canadian Cultural Tourism Sector

The Regional Canadian Cultural Tourism market is expected to increase at a lower rate than the region as a whole in the shorter term, but at the same rate over the longer term. Specifically, the market will increase by eight percent between 2006 and 2015, from 813,000 to 875,000; and by twenty percent between 2006 and 2025, from 813,000 to 977,000.

Growth in the Regional Canadian Cultural Tourism Sector –Travellers within/to Alberta

By 2015, Regional Canadian Cultural Tourists with past experience in Alberta are expected to increase by six percent, from 645,000 in 2006 to 685,000 in 2015 and to 761,000 by 2025 (18% growth from 2006). These growth rates suggest appreciably *lower* growth in cultural visitors in the shorter term (6%) compared to *all* Regional residents travelling within/to Alberta (11%), but higher growth in the longer term (18% for Regional Cultural Travellers within/to Alberta vs. 15% for *all* Regional travellers within/to Alberta).

TABLE 26: PROJECTIONS TO 2015, 2025

	Total		Travellers within/to Alberta	
	Number of Adults	Rate of Change over Current	Number of Adults	Rate of Change over Current
Regional Canadian Adult Population				
Current	7,341,000		4,546,000	
2015	8,247,000	12%	5,030,000	11%
2025	8,736,000	19%	5,233,000	15%
Regional Canadian Cultural Tourists				
Current	813,000		645,000	
2015	875,000	8%	685,000	6%
2025	977,000	20%	761,000	18%

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. Long-Haul Canadian Cultural Tourists - Detailed Findings

A. Setting the Stage – Long-Haul Canadian Travellers to Alberta

1. Market Size – All Sectors

Tourism businesses in Alberta are 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 (see Table 1). 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 MARKET SIZE	Long-Haul Canadian Market (Ontario, Québec, Atlantic Provinces)	
Unweighted base	(19,820)	
Total Adult Population*	17,435,000	
Pleasure Travellers Any Destination – Past 2 Years	13,543,000	
<u>Took Overnight Trips to Alberta</u>	#	%
Any purpose, past 10 years	2,831,000	21%
Any purpose, past 2 years	1,340,000	10%
Pleasure, past 2 years	937,000	7%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 1. *Adults are residents 18 years of age or over.

2. Market Size – Cultural Tourists

People who take a trip *in order to* engage in cultural tourism are only a fraction of tourists who go to museums, art galleries and/or historic sites or buildings while on their vacations. In fact, approximately 6.7 million Canadians in the Long-Haul market say they have gone to these types of attractions on at least one of their trips over a two-year period (50%) (see Table 2).

Of these pleasure tourists, over one-quarter or about 1.9 million (28%) claim that they took a trip *in order to* go to an art gallery, museum or historic site. Thus, the Long-Haul Canadian market for Cultural Tourists represents about one-seventh of the travelling public in eastern Canada (14%). Long-Haul Canadian Cultural Tourists who have taken an overnight trip to Alberta over the past decade (*Travellers to Alberta*) represent approximately 472,000 eastern Canadians, or three percent of the Long-Haul Canadian overnight pleasure travel market as a whole. These Travellers to Alberta constitute one-quarter of the total Long-Haul Canadian Cultural Tourist market (25% of 1.9 million).

Cultural enthusiasts – those for whom a cultural attraction is the main reason 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 cultural activities.

TABLE 2: OVERVIEW OF CULTURAL TOURISTS	Long-Haul Canadian Pleasure Travellers Any Destination – Past 2 Years	
Unweighted base	(13,830)	
Weighted, Projected	13,543,000	
Participation in Cultural Activities on Trips		
Any	6,738,000	50%
Main Reason for Trip	1,918,000	14%
Took overnight trip to Alberta - any purpose, past 10 years	472,000	3%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 1, Table 3.

B. Market Profile: Long-Haul Canadian Cultural Tourists

1. Market Segments

The Cultural Tourist sector is composed of pleasure tourists who indicated that at least one of the following activities was the main reason for a recent trip.

- **Art galleries**
- **Historic Sites**
 - Historical replicas of cities or towns with historic re-enactments
 - Historical re-enactments (as an actor)
 - Well-known historic sites or buildings
 - Other historic sites, monuments and buildings
 - Interpretive program at a historic site or national/provincial park
 - Palaeontological/archaeological sites
 - Archaeological digs
- **Museums**
 - Children's museums
 - General history or heritage museums
 - Science or technology museums
 - Military/war museums
 - Curatorial tours
 - Aboriginal heritage attractions

Historic Site Tourists – those who go to historic buildings or sites as the main reason for taking a trip dominate the sector, representing 2-in-3 Long-Haul Canadian Cultural Tourists (69%). A further 1-in-2 of these travellers are *Museum Tourists*, claiming to have taken a trip in order to go to a museum (49%), and more than one-quarter have taken a trip to visit an *art gallery* (27%) (see Table 3).

Individual Activities

Of the many individual activities that could have motivated a holiday among Long-Haul Canadian Cultural Tourists, *well-known historic sites/buildings* are the most popular. This activity is identified as the main reason for a trip by almost half of the market sector (46%). *Other historic sites, monuments and buildings* are also widely cited as the reason for a recent overnight pleasure trip (32%). *General history museums* and *art galleries* are trip drivers for over 1-in-4 Cultural Tourists. Approximately 1-in-5 sector members name *historical replicas of cities or towns with re-enactments* as the main reason for a recent overnight pleasure trip. *Science/technology museums* (16%), *military/war museums* (12%), *Aboriginal heritage attractions* (10%), and *archaeological/palaeontological sites* (9%) each attracts about

1-in-10 or more Long-Haul Canadian Cultural Tourists as the primary reason for taking a trip.²⁶

For the most part, Long-Haul Canadian Cultural Tourists who have travelled to Alberta over the past decade (*Travellers to Alberta*) resemble tourists in the sector who have *not* been to Alberta (*Non- Alberta Travellers*) in terms of the cultural activities that motivate their recent trips. There are, however, several noteworthy differences. Those who have travelled within Alberta over the past decade are:

- **more** likely to take trips driven by *archaeological/palaeontological interests*, likely because of destinations such as Drumheller and attractions like the Royal Tyrrell Museum;
- **more** likely to visit *well-known and other historic sites, monuments and buildings*.

TABLE 3: CULTURAL ACTIVITIES AS MAIN REASONS FOR OVERNIGHT TRIPS

	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Art Galleries	27%	25%	27%
Historic Buildings/Sites	69%	72%	68%
Well-known historic sites, buildings	46%	55%	43%
Other historic sites, monuments, buildings	32%	36%	31%
Historical replicas of cities/towns with re-enactments	19%	20%	18%
Palaeontological/archaeological sites	9%	14%	7%
Interpretative program at historic site or park	7%	6%	7%
Historical re-enactment (as an actor)	1%	1%	1%
Archaeological digs	1%	1%	1%
Museums	49%	50%	49%
General history museums	28%	27%	29%
Science/technology museums	16%	19%	16%
Military/war museums	12%	12%	12%
Aboriginal heritage attractions	10%	12%	9%
Children's museums	5%	6%	5%
Curatorial tours	2%	1%	2%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 2.. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

²⁶ Note that more detailed analysis of tourists motivated by Aboriginal cultural experiences and those motivated by archaeological sites and digs is available in separate reports dedicated to travellers who take trips in order to engage in these activities.

2. Geographic and Demographic Characteristics

a) Place of Residence

Long-Haul Canadian Cultural Tourists are distributed across eastern Canadian provinces in a manner that is very similar to the adult population and to the overnight pleasure travel market as a whole (see Table 4).²⁷ Thus, almost three-fifths reside in Ontario (59%), one-third live in Québec (34%) and about 1-in-12 live across the four Atlantic provinces (8%).²⁸

Each major metropolitan area in the region also contributes Long-Haul Canadian Cultural Tourists at rates consistent with the city's share of the region's population. Hence, as the region's largest city, Toronto, is home to about one-quarter of Long-Haul Canadian Cultural Tourists (25%), followed by Montréal at about one-sixth (18%). Smaller numbers of Long-Haul Canadian Cultural Tourists live in Ottawa (5%), Québec City (3%) and Halifax (1%).

Compared to their contributions to the sector as a whole, cultural tourists from eastern Canada who have been to Alberta over the past decade are significantly over-represented in Ontario (71% versus 59% of the total market) and significantly under-represented among Québec residents (19% versus 34% of the total market).

TABLE 4: PLACE OF RESIDENCE	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Ontario	59%	71%	55%
Toronto	25%	25%	25%
Ottawa	5%	8%	4%
Québec	34%	19%	39%
Montréal	18%	11%	20%
Québec City	3%	2%	4%
Atlantic Canada	8%	11%	7%
Halifax	1%	2%	1%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 42. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

²⁷See Detailed Tables, Volume 1, Table 42 for the distribution of the Canadian adult and pleasure travel markets by province/region.

²⁸ The TAMS Canada data file does *not* include information on Atlantic Canadians' place of residence by province.

b) Personal and Household Characteristics

Age, Gender, Household Composition

Every age group is represented among Long-Haul Canadian Cultural Tourists. About 1-in-7 Canadians in the sector are young adults (18 to 24 years) or between 25 and 34 years of age (15%, each) (see Table 5). Slightly more of them are between 35 and 44 years of age (17%) or between 45 and 54 years (22%). Almost one-third are 55 years of age or older (31%). Women are somewhat more likely to be Long-Haul Canadian Cultural Tourists (53%) than are men (47%).

Most Long-Haul Canadian Cultural Tourists live in households comprised of two adults (couples, 39%) or in families with children under 18 years of age (18%).

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

TABLE 5: AGE, GENDER & HOUSEHOLD COMPOSITION

	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Age			
18 – 24 Years	15%	13%	15%
25 – 34 Years	15%	15%	15%
35 – 44 Years	17%	15%	17%
45 – 54 Years	22%	22%	22%
55 – 64 Years	17%	17%	17%
65+ Years	14%	17%	13%
Gender			
Men	47%	49%	46%
Women	53%	51%	54%
Household Composition			
Lives alone	12%	13%	12%
Couples – no children	39%	39%	38%
Families – children under 18 years	18%	18%	17%
Families – all children 18+	9%	10%	9%
All other	22%	21%	24%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 40 and 41. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

Country of Birth, Education, Occupation, and Income

Three-quarters of Long-Haul Canadian Cultural Tourists were born in Canada (see Table 6). At one-quarter of the market (24%), new Canadians are somewhat more prevalent within the culturally-oriented sector than they are within eastern Canada's travelling public as a whole (20%).

Long-Haul Canadian Cultural Tourists also differ from typical tourists in terms of their education. They tend to be university educated, with 4-in-10 having at least one university degree (39%) compared to about 3-in-10 in the general travelling public (31%). Despite differences in educational achievement, however, Long-Haul Canadian Cultural Tourists closely resemble typical travellers from eastern Canada with respect to income. As such, they span the income spectrum. About 1-in-5 claim to have an annual household income of under \$40,000 or between \$40,000 and \$59,999, almost 1-in-3 have incomes between \$60,000 and \$99,999 and more than 1-in-4 are in the highest income bracket.

Approximately three-fifths of Long-Haul Canadian Cultural Tourists remain in the labour force and one-fifth are retirees.

Long-Haul Canadian Cultural Tourists who have travelled in Alberta over the past decade closely resemble the market as a whole, with two noteworthy exceptions:

- They are more likely to be Canadian-born (82%) than is the Long-Haul Canadian market (76%); and
- They are more likely to have incomes in the highest bracket (38%) than are all Long-Haul Canadian Cultural Tourists (27%).

TABLE 6: COUNTRY OF BIRTH, EDUCATION, LABOUR FORCE PARTICIPATION, INCOME	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Country of Birth			
Canada	76%	82%	74%
Other	24%	18%	26%
Education			
High school diploma or less	29%	30%	29%
Some post-secondary	10%	10%	10%
Post-secondary diploma or certificate	21%	15%	23%
University degree+	39%	45%	37%
Labour Force Participant¹	58%	55%	59%
Retirees	19%	21%	18%
Household Income			
Under \$40,000	22%	17%	24%
\$40,000 - \$59,999	19%	18%	20%
\$60,000 - \$99,999	31%	27%	32%
\$100,000+	27%	38%	24%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 36/39. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade. ¹"Labour force participant" includes working full-time, part-time and self-employed.

3. Competitive Destinations

a) Worldwide Destinations for Overnight Pleasure Trips

When asked to identify the destinations of the overnight pleasure trips they took over a two-year period, most Long-Haul Canadian Cultural Tourists indicated that they have taken recent vacations within Canada (90%) and about one-third claim to have travelled *only* within Canada (32%) (see Table 7).

Destinations for overnight pleasure trips in the past two years among Long-Haul Canadian Cultural Tourists include the U.S. (51%) and, less commonly, other countries (43%). Those who have travelled to Alberta over the past decade are, however, much more likely to have travelled to *other* destinations as well. Compared to the sector as a whole, Travellers to Alberta are especially likely to have taken an overnight trip to the U.S. (65%) and to other foreign countries (52%) in the past two years.

Apart from the U.S., the most popular destinations for Long-Haul Canadian Cultural Tourists as a whole and Travellers to Alberta are Europe and the Caribbean.

Note to Readers

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

In other words, Long-Haul Canadian Cultural Tourists claim to have taken an overnight trip motivated by cultural attractions 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, Cultural Tourists may or may not have been to an art gallery, historic site or museum in a particular country, province or state they have visited recently for an overnight pleasure trip.

TABLE 7: COMPETITIVE DESTINATIONS WORLDWIDE	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Canada	90%	94%	89%
Canada only	32%	19%	36%
U.S.	51%	65%	46%
Other Countries (NET)	43%	52%	23%
Europe	24%	29%	23%
Caribbean	15%	18%	14%
Mexico	8%	9%	7%
Asia	7%	9%	6%
South/Central America	6%	10%	5%
Africa/ Australia/New Zealand	3%	6%	2%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 47. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

b) Canadian Destinations

One-quarter of Long-Haul Canadian Cultural Tourists have had some travel experience in Alberta over a ten-year period (25%) and one-tenth (9%) have been to the province on an overnight pleasure trip in the past two years (see Table 8). 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 (36%) than is the case among the sector as a whole (9%).

Recall that almost three-fifths of Long-Haul Canadian Cultural 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 Long-Haul Canadian Cultural Tourists (65%). When *intra-provincial* tourists are excluded, Ontario remains a recent destination for 1-in-7 culturally-oriented tourists from the region. A similar pattern is evident for Québec. Including residents of the province, Québec has been a destination for over half of eastern Canada's cultural tourists (53%). Excluding Québec residents, the province has been a recent destination for almost 2-in-10 Long-Haul Canadian Cultural Tourists (18%).

Atlantic Canada is also popular as a destination among Long-Haul Canadian Cultural Tourists (23% including residents). Once their residents are excluded, the four Atlantic provinces remain a pleasure trip destination for 1-in-8 Long-Haul Canadian Cultural Tourists (12%) – a level of popularity about on par with British Columbia (10%) and Alberta (9%).

As noted in the previous section, Long-Haul Canadian Cultural Tourists who have been to Alberta are more widely travelled than is the sector as a whole. Not only do these Canadians go to the U.S. and other countries at higher rates than does the typical Long-Haul Canadian Cultural Tourist, but also they travel to every Canadian province at higher than typical rates. Their favourites include those where they live – Ontario, Québec and Atlantic Canada – as well as Alberta (36%), British Columbia (24%) and, less commonly, Manitoba (13%) and Saskatchewan (10%).

TABLE 8: CANADIAN DESTINATIONS*	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Alberta			
Any purpose, past 10 years	25%	100%	-
Any purpose, past 2 years	11%	45%	-
Pleasure, past 2 years	9%	36%	-
Overnight Pleasure Trips in Past 2 Years to . . .			
Atlantic Canada	23%	31%	21%
Excluding Atlantic Canada Residents	12%	18%	11%
Québec	53%	54%	53%
Excluding Québec Residents	18%	28%	15%
Ontario	65%	73%	63%
Excluding Ontario Residents	14%	14%	14%
Manitoba	4%	13%	1%
Saskatchewan	3%	10%	1%
British Columbia	10%	24%	6%
Yukon	1%	1%	*
Northwest Territories	*	1%	*

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 1, 47/48. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade. *Less than 0.5%.

4. U.S. Pleasure Travel Destinations

Depending on how the information is assessed, Alberta either competes with *very few* American states for the Long-Haul Canadian Cultural Tourist market or it competes with *many*. Only two *long-haul* states have attracted at least 1-in-20 of these tourists for an overnight pleasure trip in the past two years – Florida (14%) and, less commonly, California (6%) (see Table 9). 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. 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 cultural interests.

Recall that at least half of the Long-Haul Canadian Cultural Tourist market have travelled recently within the U.S., but few states have attracted sizeable numbers of these tourists. There is, in effect, a high level of dispersion in U.S. destination selections, suggesting a fragmented market that does not view any particular state as a cultural mecca.

TABLE 9: U.S. DESTINATIONS*	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
New York State	24%	30%	22%
Florida	14%	15%	14%
Michigan	8%	14%	6%
Massachusetts	7%	10%	6%
California	6%	10%	5%
Maine	6%	11%	5%
New Jersey	5%	4%	5%
Pennsylvania	5%	8%	4%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 47. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade. *States displayed represent destinations visited by at least 5% of sector members.

5. Destinations: Roles & Ratings

a) Importance of Destination

Over half of Long-Haul Canadian Cultural Tourists claim that **destination** is their first consideration in planning a recent summer and/or winter trip (see Table 10). At the same time, one-quarter begin with the **type of vacation experience** they wish to have and one-fifth start their trip planning process with a focus on the **activities** they want to enjoy while on their trip

Eastern Canadian Cultural Tourists also put a premium on **destination choice** *per se*, with 7-in-10 claiming that it is *extremely* or *very important* to them. A similar level of importance is accorded destination *per se* by the subset of these tourists with visits to Alberta over the past decade.

	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
First Consideration for Most Recent Summer/Winter Trip (NET)*			
Start with destination	57%	60%	56%
Start with type of vacation experience	25%	26%	25%
Start with activities	21%	22%	21%
Look for package deal	3%	3%	3%
Other/not stated	19%	19%	19%
Importance of Destination			
Extremely/Very Important (SUM)	71%	75%	69%
Extremely important	27%	28%	26%
Very important	44%	47%	43%
Average**	3.9	4.0	3.9

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. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural 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.²⁹

On balance, Long-Haul Canadian Cultural Tourists and Travellers to Alberta within the sector resemble overnight pleasure travellers as a whole in terms of the conditions they accord *high importance* when selecting a destination. Like other Canadian tourists, members of this sector put *feeling safe* (64%) at the top of their list (see Table 11). Half of them seek a destination that poses *no health concerns* (50%) and one that offers *convenient access by car* to their destination (47%).³⁰ Slightly fewer are looking for *many things for adults to see and do* (44%).

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

	Long-Haul Canadian Cultural Tourists		All Long-Haul Canadian <u>Pleasure Tourists</u>
	Total	Travellers To Alberta	
Feeling safe	64%	69%	65%
No health concerns	50%	48%	51%
Convenient access by car (to destination)	47%	39%	45%
Lots for adults to see/do	44%	45%	37%

Close to one-third seek destinations offering *mid-range lodging* (32%) and/or *direct air access* (30%). About 1-in-4 Long-Haul Canadian Cultural Tourists deem *budget lodging* and *information on the internet* important destination characteristics.

There are no major differences between Long-Haul Canadian Cultural Tourists as a whole and those who have travelled in Alberta over the past decade in terms of the conditions they deem highly important in their destination choices. Nonetheless, Travellers to Alberta are less likely than are all Long-Haul Canadian Cultural Tourists to emphasize *access by car* and *availability of low cost packages* when identifying important destination selection criteria.

²⁹ “Highly important”, “Somewhat important”, and “Of no importance”.

³⁰ 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

	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Feeling safe	64%	69%	62%
No health concerns	50%	48%	51%
Convenient access by car (to destination)	47%	39%	49%
Lots for adults to see/do	44%	45%	44%
Mid-range accommodation	32%	33%	32%
Direct access by air (to destination)	30%	32%	30%
Information available on internet	25%	27%	25%
Budget accommodation	24%	20%	25%
Low cost packages available	20%	13%	22%
Convenient access by train/bus (to destination)	18%	20%	18%
Camping	14%	11%	15%
Very different culture than own	14%	16%	14%
Lots for children to see/do	13%	12%	14%
Familiar with culture & language	12%	11%	13%
Great shopping	12%	12%	12%
Have friends or relatives there	7%	8%	7%
Luxury accommodation	6%	7%	6%
Disabled-person-friendly	6%	5%	7%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 27. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

c) Appeal of Various Destinations

Long-Haul Canadian Cultural Tourists are most enthusiastic about British Columbia as an *appealing destination* for pleasure travel, according to this province an average rating of 8.6 on a ten-point scale (see Table 12).³¹ On the same scale, Alberta is rated at only 7.1. Other destinations deemed *more* appealing than Alberta by Long-Haul Canadian Cultural Tourists include Hawaii (8.1), Québec (7.9), Ontario (7.8), California (7.6), Nova Scotia (7.4) and Prince Edward Island (7.3).³²

Alberta's rating increases substantively among Travellers to Alberta, suggesting that direct experience in the province overcomes preconceptions about it. At a rating of 8.1 within this subset of Long-Haul Canadian Cultural Tourists, Alberta trails only British Columbia (9.0), is at parity with Hawaii (8.2) and is ahead of every other province, territory or state covered in the study for its overall touristic appeal.

Summary: Highest Appeal Destinations among Long-Haul Canadian Cultural Tourists

	Long-Haul Canadian Cultural Tourists		All Long-Haul Canadian Pleasure Tourists
	<u>Total</u>	<u>Travellers to Alberta</u>	
British Columbia	8.6	9.0	8.3
Hawaii	8.1	8.2	8.2
Québec	7.9	7.7	7.3
Ontario	7.8	7.8	7.5
California	7.6	7.7	7.5
Nova Scotia	7.4	7.7	7.2
Prince Edward Island	7.3	7.5	7.1
Alberta	7.1	8.1	6.7

³¹ 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.e).

³² A spread of more than three tenths (0.3) between one destination and another is required to constitute a "real" difference in average ratings.

TABLE 12: APPEAL OF VARIOUS DESTINATIONS*

	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Alberta	7.1	8.1	6.6
Newfoundland & Labrador	6.6	7.3	6.3
Nova Scotia	7.4	7.7	7.3
New Brunswick	6.9	6.8	6.9
Prince Edward Island	7.3	7.5	7.3
Québec	7.9	7.7	7.9
Ontario	7.8	7.8	7.8
Manitoba	5.0	5.3	4.9
Saskatchewan	4.8	5.0	4.7
British Columbia	8.6	9.0	8.5
Yukon	6.0	6.6	5.8
Northwest Territories	5.4	5.9	5.2
Nunavut	4.9	5.4	4.7
U.S. STATES			
New York State	6.9	7.0	6.9
Colorado	6.4	6.7	6.3
Florida	6.9	6.7	7.0
California	7.6	7.7	7.6
Hawaii	8.1	8.2	8.1
Arizona	6.6	6.8	6.5

Total includes Long-Haul 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 visiting a cultural attraction or site. *Travellers to Alberta* are Cultural 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 Cultural 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

The *same* destinations accorded high *appeal* ratings are also the ones that emerge at the top of Long-Haul Canadian Cultural Tourists' lists for having *many good reasons* to visit on a pleasure trip (see Table 13).³³ Specifically, British Columbia tops the list with 2-in-3 stating that there are many good reasons to go to this province. Half or more of these culturally-oriented tourists say that there are many good reasons to visit Québec, Ontario, Hawaii and/or California, but only about one-third make this claim with respect to Alberta (34%).

As is the case for overall touristic appeal, experience with Alberta's tourism infrastructure increases Long-Haul Canadian Cultural Tourists' perceptions of the province. Appreciably more tourists who have travelled within the province over the past decade claim that there are *many good reasons* to visit (59%) than is the case among those who have not been to Alberta (26%).

Summary: Highest Rated Destinations among Long-Haul Canadian Cultural Tourists

	Long-Haul Canadian Cultural Tourists		All Long-Haul Canadian Pleasure Tourists
	<u>Total</u>	<u>Travellers to Alberta</u>	
British Columbia	66%	81%	58%
Québec	59%	58%	47%
Ontario	55%	59%	50%
Hawaii	54%	56%	54%
California	49%	52%	47%
Florida	40%	38%	43%
Nova Scotia	39%	51%	33%
New York State	37%	44%	32%
Prince Edward Island	36%	44%	32%
Alberta	34%	59%	29%

³³ 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*.

TABLE 13: NUMBER OF REASONS TO VISIT VARIOUS DESTINATIONS

	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
<i>% stating MANY good reasons to visit destination</i>			
Alberta	34%	59%	26%
Newfoundland & Labrador	32%	45%	27%
Nova Scotia	39%	51%	35%
New Brunswick	27%	29%	27%
Prince Edward Island	36%	44%	34%
Québec	59%	58%	59%
Ontario	55%	59%	53%
Manitoba	6%	8%	6%
Saskatchewan	6%	8%	6%
British Columbia	66%	81%	61%
Yukon	18%	24%	16%
Northwest Territories	13%	18%	12%
Nunavut	11%	17%	9%
U.S. STATES			
New York State	37%	44%	35%
Colorado	20%	22%	19%
Florida	40%	38%	41%
California	49%	52%	48%
Hawaii	54%	56%	54%
Arizona	22%	30%	20%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 29. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural 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*.³⁴

As noted previously, Long-Haul Canadian Cultural Tourists claim to have taken an overnight trip motivated by a cultural activity in the past two years or so and to have taken pleasure trips to specific destinations, but TAMS does not provide information that links the activities to the destination(s) visited. Nonetheless, it is reasonable to assume that some of the historic sites, art galleries, general history museums or archaeological digs that have motivated trips among those who have been to Alberta over the past decade are located in 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* Long-Haul Canadian Cultural Tourists to take overnight pleasure trips (*main reason*) and the level of *any* participation in these same activities.

³⁴ Presumably, “these trips” are those on which the specific activity took place.

2. Trip Activities & Drivers

a) Major Trip Activity Groups

Like most tourists, Long-Haul Canadian Cultural 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).³⁵

- In addition to taking trips in order to go to historic sites or buildings, museums, or art galleries, three-fifths of these Canadians take trips in order to engage in at least one **land-based outdoor activity** such as camping, hiking, bird watching or viewing land-based animals; and/or to engage in a **water-based outdoor activity** including fishing, diving, snorkelling, river rafting and canoeing (59%, each).
- About one-half have taken recent overnight pleasure trips in order to stay in a resort or lodge (**lodging**).
- **Culinary experiences** are trip motivators for over 2-in-5 Long-Haul Canadian Cultural Tourists.
- Approximately 1-in-3 include **fairs and festivals, shopping, and/or theme parks** and other similar types of entertainment among the main reasons for trips taken over the past two years.
- At least one-quarter of these tourists say they have taken a holiday to go to **performing arts events** such as classical or jazz concerts, ballet, opera or live theatre; or a trip to ski or engage in other **outdoor winter activities**.
- **Spectator sporting events** such as professional hockey or football games are primary trip drivers for about one-fifth of Long-Haul Canadian Cultural Tourists.

There are no substantive differences in the types of activities that motivate trips for the market as a whole versus those with Alberta tourism experiences over the past decade.

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 virtually every major activity group. For example, more Long-Haul Canadian Cultural Tourists *participated* in at least one land-based outdoor activity while on a recent overnight pleasure trip (78%) than claim to have taken a trip motivated by one

³⁵ For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

of these activities (59%). The most dramatic shifts are associated with dining and shopping. Food and wine experiences are, in effect, “one-of-many” trip activities for almost all Long-Haul Canadian Cultural Tourists (89%), but the driving force behind a trip for fewer segment members (43%). Similarly, over 8-in-10 Long-Haul Canadian Cultural Tourists say that they went shopping on a recent trip, but only about 1-in-3 of them took the trip primarily *in order to shop*.

* * * * *

These findings suggest that to attract Long-Haul Canadian Cultural Tourists to Alberta, tourism marketers and packagers might take into account the following:

- Recognize that Long-Haul Canadian Cultural Tourists are *multi-dimensional* tourists.
- They may place particular emphasis on *cultural 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 cultural 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 Long-Haul Canadian Cultural Tourists may require assurances that they will have opportunities to shop and have fine dining or wine-tasting experiences while on a culturally-focussed trip.

TABLE 14: MAJOR ACTIVITY GROUPS
- MAIN & ANY

	Long-Haul Canadian Cultural Tourists			
	<u>Total</u>		<u>Travellers to Alberta</u>	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(2,032)	(2,032)	(551)	(551)
Weighted, Projected	1,918,000	1,918,000	472,000	472,000
Historic Sites/Buildings	65%	79%	70%	86%
Outdoor Land-Based Activities	59%	78%	60%	80%
Outdoor Water-Based Activities	59%	77%	61%	83%
Lodging (Lodges, Resorts, etc.)	48%	72%	52%	78%
Museums	44%	68%	41%	77%
Food & Wine	43%	89%	38%	91%
Fairs/Festivals	35%	55%	32%	59%
Shopping	33%	85%	33%	86%
Theme/Amusement Parks/Movies (Entertainment)	30%	48%	27%	50%
Art Galleries	27%	45%	25%	55%
Outdoor Winter Activities	27%	38%	29%	45%
Performing Arts	26%	44%	31%	56%
Spectator Sports	21%	31%	21%	35%
Aboriginal Culture/Events	13%	22%	15%	27%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination.

b) Individual Trip Activities: The Outdoors

When taken as a whole, the *outdoor* activity profile of Long-Haul Canadian Cultural Tourists suggests individuals who *observe* rather than *interact* with nature (see Table 15).³⁶ Outdoor activities that attract at least 1-in-4 of these tourists on an *any participation* basis are limited to seeing well-known wonders, going to nature parks, sunbathing or sitting on a beach, swimming in lakes or oceans, viewing flora and/or fauna, camping, hiking, and/or fishing. Of these activities, visiting natural wonders or nature parks, being on a beach and camping are most apt to be trip drivers (*main activity*).

All tourists in the sector and those with trips in Alberta over the past decade have almost identical outdoor activity profiles.

* * * * *

Since Alberta offers superb outdoor products that coincide with many of the ones most popular among Long-Haul Canadian Cultural Tourists, packaging of historic sites, museums, art galleries or archaeological/palaeontological attractions *with* outdoor activities such visits to the Rocky Mountain parks or natural wonders in the Canadian Badlands that include day hikes, wildlife viewing or camping might attract more cultural tourists to the province.

³⁶ 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 & ANY*

	Long-Haul Canadian Cultural Tourists			
	<u>Total</u>		<u>Travellers to Alberta</u>	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(2,032)	(2,032)	(551)	(551)
Weighted, Projected	1,918,000	1,918,000	472,000	472,000
Well-known natural wonders	31%	45%	36%	57%
Nature park	29%	44%	31%	48%
Sunbathing or sitting on a beach	29%	48%	30%	52%
Camping	27%	39%	27%	40%
Public campground	20%	31%	22%	35%
Private campground	12%	21%	15%	22%
Wilderness campsite	8%	10%	9%	10%
Swimming in lakes	20%	42%	18%	48%
Swimming in oceans	18%	35%	17%	42%
Flora/fauna viewing	18%	38%	14%	41%
Wildlife viewing – land-based animals	9%	23%	8%	24%
Whale watching	8%	18%	6%	22%
Wildflowers/flora	7%	19%	6%	19%
Bird watching	6%	17%	5%	15%
Hiking – Day excursions	15%	32%	19%	39%
Fishing	15%	26%	13%	22%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "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, Long-Haul Canadian Cultural Tourists take trips *in order to* engage in various historical and cultural activities such as seeing historic sites or buildings and going to museums or art galleries. They are also motivated to take trips in order to see cities' architecture (43%), and to a lesser degree, to attend live theatre and other arts performances (26%) (see Table 16).

In addition to these culturally-oriented activities, the majority of Long-Haul Canadian Cultural Tourists have recently taken overnight pleasure trips with an entertainment focus (64%). The most popular entertainment trip drivers include fairs or festivals (35%), spectator sporting events (21%) and amusement parks (18%). These, along with many other entertainment activities, are more apt to constitute *things to see and do* than the *motivation* for overnight trips.³⁷

Culture – Any Participation

Even more Long-Haul Canadian Cultural Tourists engage in the cultural activities used to define the sector as “one-of-many” trip activities than are motivated to take overnight pleasure trips in order to engage in these activities. For example, over 2-in-5 have taken a trip primarily to visit a *well-known historic site* (46%, main), but more than 3-in-5 have gone to such a site on a recent holiday (64%, any). Similarly, 1-in-4 took trips primarily to visit an *art gallery* while almost 1-in-2 went to an art gallery as one of their activities on a recent trip.

Strolling around a city to observe its buildings and architecture (43%, main) is especially popular as a trip activity (66%, any). The same increase in enthusiasm is evident for visiting *museums* as one activity on a trip planned for a different main reason. Considerably more Long-Haul Canadian Cultural Tourists say they go to museums dedicated to general history, science/technology, military history or Aboriginal heritage (68%) than claim that these attractions constitute the *main reason* for their trip (44%).

Entertainment – Any Participation

As noted above, most Long-Haul Canadian Cultural Tourists have taken overnight pleasure trips in order to engage in various entertainment activities (64%, main) and almost all have participated in such activities on recent holidays (87%, any). Fairs and festivals including fireworks displays, movies, casinos, followed by spectator sporting events, free outdoor performances, farmers' markets, amusement parks, botanical

³⁷ For the complete array of individual *main* and *any* activities, the reader is directed to the detailed tabulations, under separate cover.

gardens and zoos are particularly popular *things to see and do* while on overnight holidays (*any participation*).

* * * * *

The vast array of cultural and entertainment activities engaged in by Long-Haul Canadian Cultural Tourists attests to their eclectic and wide-ranging interests. They describe themselves as tourists who want a *break from the day-to-day* and a *stress-reducing holiday* that makes them feel that they have *seen and done something new and different*.³⁸ Thus, when marketing Alberta's cultural attractions to them, consideration might be given to a *menu* that highlights the province's unique sites and attractions.

- The menu concept might convey to potential tourists from eastern Canada that Alberta offers *many things for adults to see and do* – a highly important factor in destination selection for many of these tourists.³⁹
- Such a menu might include explorations of military history and/or historical military re-enactments, general history or science museum visits that include curatorial tours, Aboriginal cultural events, and/or side trips to archaeological or palaeontological sites.
- On the lighter side and to provide evening entertainment, sporting events, casinos, fireworks displays, theatre or music performances might also be included on the menu.

³⁸ See Section IV.E.2: *Benefits Sought From Pleasure Travel* for details.

³⁹ See Section IV.B.5.b: *Importance of Conditions in Destination Choice* for details.

TABLE 16: INDIVIDUAL CULTURAL/ENTERTAINMENT ACTIVITIES – MAIN & ANY*

	Long-Haul Canadian Cultural Tourists			
	Total		Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(2,032)	(2,032)	(551)	(551)
Weighted, Projected	1,918,000	1,918,000	472,000	472,000
Cultural Activities				
Historic sites/buildings (any)	65%	79%	70%	86%
Historic sites – well-known	46%	64%	55%	74%
Historic sites – other	32%	54%	36%	62%
Historic replicas with re-enactments	19%	27%	20%	33%
Palaeontological/archaeological sites	9%	16%	14%	25%
Strolling around a city to see architecture	43%	66%	48%	76%
Art galleries	27%	45%	25%	55%
Museums (any)	44%	68%	41%	77%
General history museum	28%	51%	27%	57%
Science/technology museum	16%	26%	19%	33%
Military/war museum	12%	24%	12%	30%
Aboriginal heritage attractions	10%	17%	12%	23%
Performing Arts (any)	26%	44%	31%	56%
Live theatre performances	19%	32%	22%	41%
Entertainment	64%	87%	62%	92%
Fairs/Festivals	35%	55%	32%	59%
Fireworks displays	11%	25%	8%	26%
Spectator sporting events	21%	31%	21%	35%
Amusement parks	18%	27%	16%	27%
Zoos	15%	25%	18%	30%
Casinos	15%	33%	11%	31%
Farmers' markets or country fairs	14%	28%	17%	42%
Movies/cinema	14%	40%	12%	46%
Free outdoor performances	12%	29%	11%	29%
Botanical gardens	11%	26%	16%	32%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. "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.

d) Individual Trip Activities: Lodging, Food/Wine, Shopping**Lodging**

Resorts, including seaside, lakeside and mountain/ski resorts, drive trips for one-third of Long-Haul Canadian Cultural Tourists (31%, main) and are used for lodging by over half of them (54%, 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 driven by other activities (7% main; 11% any).

Food & Wine

Collectively, food and wine activities drive trips for 4-in-10 Long-Haul Canadian Cultural Tourists. Individually, dining out at restaurants offering *local* ingredients and 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, including those who have travelled to Alberta in the past decade.

Shopping

Shopping for apparel, books or music, and local arts and crafts is a common trip pastime for Long-Haul Canadian Cultural Tourists and the subset with trips to Alberta over the past decade, but tends not to be the motivation for recent overnight pleasure travel.

* * * * *

Shopping and dining experiences are clearly in high demand as one of the many activities culturally-oriented tourists engage in at a destination. Thus, they 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*	Long-Haul Canadian Cultural Tourists			
	Total		Travellers to Alberta	
	Main Reason	Any Participation	Main Reason	Any Participation
Unweighted base	(2,032)	(2,032)	(551)	(551)
Weighted, Projected	1,918,000	1,918,000	472,000	472,000
Lodging (NET)**	48%	72%	52%	78%
Resorts/Spas	31%	54%	37%	61%
Seaside resort	17%	27%	21%	31%
Lakeside resort	18%	34%	21%	36%
Ski/mountain resort	9%	16%	13%	26%
Wilderness/remote lodge	7%	11%	8%	13%
Food & Wine	43%	89%	38%	91%
Dining – restaurants offering local ingredients and recipes	23%	71%	18%	76%
Local outdoor cafes	12%	56%	12%	64%
Wineries – day tours/tastings	11%	28%	12%	32%
Dining – other high end restaurants	12%	39%	9%	46%
Dining – high end restaurants with international reputation	8%	26%	9%	28%
Shopping	33%	85%	33%	86%
Clothing, shoes, jewellery	20%	63%	18%	66%
Local arts & crafts studios	14%	53%	17%	61%
Bookstores or music stores	14%	54%	13%	61%
Greenhouse or garden centre	9%	25%	11%	31%
Gourmet foods	6%	27%	9%	31%
Antiques	10%	36%	12%	37%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 4 through 13. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural Tourists who claim to have taken at least one overnight trip in the past ten years or so to an Alberta destination. *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.

e) Overnight Cruises & Organized Group Tours

One-fifth of Long-Haul Canadian Cultural Tourists have recently been overnight cruise passengers (20%) whereas more than twice this proportion have taken some form of organized overnight tour over the past two of years (48%) (see Table 18). Slightly fewer tour participants claim to have taken an **organized** overnight group tour (27%) than to have taken a **self-directed** touring trip over a two-year period (32%). Those who have gone on an overnight organized tour tend to prefer tours that include *multiple* (20%) rather than *single* destinations (13%).

Taking a day tour while on an overnight trip is about as characteristic of Long-Haul Canadian Cultural Tourists (53%) as is taking any type of overnight tour (48%). Favoured themes for organized day excursions include tours around the countryside or a city, followed by sightseeing cruises, and wilderness or outdoor tours. These same themes are popular among Long-Haul Canadian Cultural Tourists who take *self-directed* day touring excursions.⁴⁰

⁴⁰ See Detailed Tabulations, Volume 2, Table 15 for figures.

TABLE 18: CRUISES/GROUP TOURS	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Took any overnight cruise in past 2 years	20%	23%	19%
Overnight Touring (NET)	48%	51%	47%
Organized Tour	27%	26%	27%
Multiple Locations	20%	21%	20%
Single Location	13%	14%	13%
Self-Directed Touring	32%	37%	31%
Same-Day Touring on Overnight Trip (NET)	53%	62%	50%
Self-Directed Touring	43%	55%	39%
Organized Excursion	30%	37%	28%
Type of Organized Day Tour			
<i>Among Organized Day Tour Takers</i>	(100%)	(100%)	(100%)
City	69%	77%	65%
Countryside	61%	69%	57%
Sightseeing cruise (day excursion)	49%	51%	48%
Wilderness/outdoor	36%	45%	32%
Casino	22%	27%	20%
Wineries	21%	30%	17%
Factory	12%	14%	11%
Airplane/helicopter (pilot or passenger)	5%	6%	4%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 14/16. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

D. Trip Planning

1. Who Does the Planning?

Almost all Long-Haul Canadian Cultural Tourists and the segment of these tourists who have been to Alberta over the past decade 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 culture enthusiast or is shared with other household member(s).

TABLE 19: TRAVEL PLANNING	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Frequency of personal involvement in trip planning, past 2 years			
All	64%	63%	65%
Most	16%	18%	16%
Some	10%	11%	10%
None/not stated	9%	9%	9%
Main responsibility for trip planning			
Respondent	38%	41%	37%
Shared with other household member(s)	28%	25%	29%
Spouse/partner	12%	14%	12%
Other/not stated/not involved in travel planning	22%	20%	22%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 18,19. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

2. Travel Information Sources & Travel Media

Of the many travel information sources available, relatively few enjoy widespread use among Long-Haul Canadian Cultural Tourists apart from the internet, past experience and personal connections. The **internet** tops the chart for these tourists (65%) (see Table 20). Over half use anecdotal information provided by **friends and relatives** or rely on their own **past experience**.

Somewhat fewer include **official travel guides or brochures from provincial, state or national organizations** (*Official Travel Guides*), **maps** and/or **newspaper** articles or advertisements among their sources of travel information. Use of a **visitor information centre** or **travel agent**, is characteristic of about 1-in-3 Long-Haul Canadian Cultural Tourists.

Travellers to Alberta in the sector tend to rely on a wider array of information sources than do eastern Canadians who have not travelled to Alberta over the past decade. Specifically, Travellers to Alberta are more apt to use the internet, official travel guides, maps, travel agents and travel guide books than are their counterparts with no trips to Alberta.

With most Long-Haul Canadian Cultural Tourists relying on the internet for travel planning and almost one-half saying that they *normally* visit **travel websites**, the internet offers the greatest potential for reaching this market. Use of online travel information tools is appreciably more widespread than is readership of weekend or weekday travel sections in local newspapers or readership of most types of magazines. Nonetheless, about one-third of Long-Haul Canadian Cultural Tourists claim regular readership of *weekend* travel sections in the local paper or say they read general interest magazines such as *Harper's* or the *New Yorker*, news magazines like *Time* or *Newsweek*, entertainment/music magazines such as *People*, and/or food/cooking magazines such as *Gourmet* in a typical month.⁴¹

⁴¹ 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 & GENERAL MEDIA HABITS

	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
SOURCES OF TRAVEL PLANNING INFO			
Internet website	65%	71%	63%
Advice of friends/relatives	54%	57%	53%
Past experience	52%	59%	50%
Official travel guides	41%	50%	38%
Maps	38%	45%	35%
Any newspaper	38%	43%	36%
Articles	31%	34%	31%
Advertisements	22%	24%	22%
Visitor information centres	36%	40%	35%
Travel agent	35%	43%	33%
Auto club	23%	26%	22%
Travel guide books	22%	31%	19%
Any television	14%	13%	15%
Programs	10%	11%	10%
Advertisements	8%	7%	8%
Travel information in mail	14%	19%	12%
Electronic newsletters via e-mail	6%	9%	5%
Trade, travel, sportsmen's shows	5%	6%	5%
TRAVEL MEDIA*			
Frequently read newspaper Travel Section			
In weekday editions	25%	30%	24%
In weekend editions	35%	44%	32%
Magazines read in typical month			
General interest (<i>Harper's, New Yorker</i>)	37%	41%	36%
News (<i>Time, Newsweek</i>)	35%	42%	32%
Entertainment/music (<i>People, TVGuide</i>)	32%	30%	33%
Food/cooking (<i>Gourmet, Bon Appetit</i>)	31%	29%	31%
Home/garden	29%	31%	28%
Fashion/beauty	28%	29%	27%
Science/geography (<i>Nat'l Geographic</i>)	23%	20%	24%
Travel (<i>Condé Nast, Travel & Leisure</i>)	19%	19%	19%
Normally watch Travel Shows on TV	41%	35%	43%
Normally visit Travel websites	48%	54%	45%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 20,30-32, 34. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural 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

As noted in the previous section, most Long-Haul Canadian Cultural Tourists rely on the internet for travel *planning*. Hotel/resort and destination marketing organization (DMO) sites are the most commonly used among the tourists who rely on the internet for travel planning (see Table 21). Other sites used by approximately 1-in-2 internet users include airline, attraction and travel planning sites such as *Expedia* or *Travelocity*. Possibly because they are more widely travelled than the typical Long-Haul Canadian Cultural Tourist, Travellers to Alberta are particularly likely to visit *airline* websites.

Not surprisingly, *booking* online is less common than is searching for information on the internet. Nonetheless, two-fifths of Long-Haul Canadian Cultural Tourists claim to have made a travel-related booking online over the past two years or so (42%). Online purchases are more common among Travellers to Alberta (53%) than among Non-Alberta Travellers (38%).

As their website preferences would suggest, the most common online bookings are for accommodation and air tickets and, to a lesser degree, car rentals and activity/attraction tickets. Sector members who have travelled to Alberta over the past ten years are especially likely to have made online purchases of airline tickets, car rentals, and to a lesser extent, other transportation tickets (e.g., rail, bus).

* * * * *

Since they have both obtained travel information and been to Alberta over the past decade, Travellers to Alberta provide the most salient guidance about how to reach *other* eastern Canadian cultural tourists and encourage them to come to Alberta. In this context, internet, print media and provision of a wonderful experience to those who come to Alberta are worthy of special notice.

- Specifically, maintenance of Alberta's DMO websites and visibility on websites such as *Expedia* or *Travelocity* are essential;
- Widely used print media include *weekend* travel sections of local newspapers with editorial coverage of Alberta's cultural tourism options, news magazines such as *Time* or *Newsweek*, general interest magazines such as *Harper's* and the official printed guides from the province or its municipalities and regions;
- By keeping Alberta's information prominently displayed and up-to-date at travel agencies, more Long-Haul Canadian Cultural Tourists might be encouraged to visit the province;

- Creating goodwill ambassadors from culturally-oriented tourists from eastern Canada who have travelled in Alberta is necessary to ensure that *advice of friends/relatives* is favourable and forthcoming. To meet this objective, Alberta has to deliver on its promises. Based on the high overall rating by Long-Haul Canadian Cultural Tourists who have been to Alberta over the past decade (8.1 on a ten point scale), the province seems to be achieving this goal.

TABLE 21: WEBSITE USAGE FOR TRAVEL PLANNING

	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Used Internet website for travel planning, past 2 years	65% (100%)	71% (100%)	63% (100%)
<u>Internet website(s) used</u> <i>(Among Users)</i>			
Hotel/resort	65%	67%	64%
Destination marketing organization (DMO)	60%	64%	59%
Attraction	50%	52%	49%
Airline	47%	63%	41%
Travel planning/booking	47%	55%	44%
Cruise	10%	13%	9%
Motorcoach	4%	5%	4%
Other	32%	36%	31%
Any Internet Purchases in Past 2 Years <i>(Among All Overnight Pleasure Travellers)</i>	42% (100%)	53% (100%)	38% (100%)
<u>Items Purchased Online</u> <i>(Among Purchasers)</i>			
Accommodation	82%	84%	82%
Air tickets	64%	79%	57%
Car rental	31%	47%	24%
Tickets for activities/attractions	31%	31%	31%
Rail, bus, boat tickets	24%	34%	19%
Package deal (2+ items)	17%	15%	17%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Tables 21, 22.. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

E. Other Travel-Related Information

1. Use of Package Deals

Purchase of package deals in the past two years is relatively uncommon among Long-Haul Canadian Cultural Tourists (see Table 22). Only about 1-in-14 say they relied on a package deal for *all* or *most* of their trips over the past two years (7%) and a further 1-in-3 have used package deals for *one* or *some* of these trips (32%).

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

TABLE 22: PACKAGE DEALS	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Frequency of Purchasing Packages in Past 2 Years			
Most/all trips	7%	6%	7%
One/some trips	32%	35%	31%
No trips/not stated/not sure	61%	58%	62%
Desired Components of Packages (Among Purchasers of Packages)			
Accommodation	89%	93%	87%
Transport to destination	82%	90%	79%
Food and beverage	62%	65%	61%
Tickets for activities/attractions	55%	57%	55%
Transport at destination	53%	55%	52%
Other	15%	13%	16%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 23. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

2. Benefits Sought From Pleasure Travel

Three *sets* of benefits for taking pleasure or vacation trips characterize Long-Haul Canadian Cultural Tourists (see Table 23).⁴² At the top of the list are the trip's ability to **relieve stress** and offer the traveller a **break from the day-to-day environment**, held to be key benefits by almost 2-in-3 Long-Haul Canadian Cultural Tourists. The second set, endorsed as benefits of holidays by over 1-in-2 of these tourists, includes an opportunity to **see and do new/different things** and forming the basis of **lasting memories**. Close to half of sector members consider a third set of characteristics among key benefits of a holiday:

- **enriching familial relationships**
- **abandoning a fixed schedule**
- **expanding their knowledge of history, other cultures and other places**

Those who have and have not travelled to Alberta over the past decade display similar attitudes towards the benefits of holidays. Nonetheless, Travellers to Alberta are somewhat more inclined to want their knowledge base of history, culture and places expanded whereas Non-Alberta Travellers are more apt to seek a schedule-free break from their day-to-day environment.

Benefits with *low appeal* to Long-Haul Canadian Cultural Tourists include **having stories to tell** once the trip is over, **being pampered** and finding **solitude and isolation**.

* * * * *

From a marketing perspective, Long-Haul Canadian Cultural Tourists might be reminded that Alberta has *unique* and *out-of-the-ordinary* cultural attractions and events that can be experienced in a relaxed and stress-free way. These tourists, and most particularly those who have been to the province, want their trip to be *memorable*, to represent cultural experiences they would not have elsewhere.

- Remember that many Long-Haul Canadian Cultural Tourists, and especially those who have been to Alberta over the past decade, are world-travellers. They can or have seen historic sites, art galleries, and museums in the U.S., Europe and other regions around the globe.

⁴²Consumers were asked to indicate the importance they attach to a variety of possible *benefits* from pleasure travel using a three-point semantic scale ranging from *of no importance* to *highly important*. The figures presented in this section are the proportion of tourists who claim a benefit is *highly important*.

- Thus, Alberta might focus on the elements that make its cultural experiences “special”, whether because the museum or gallery offers a unique experience in its own right or because the tourist can enjoy the cultural experience in the context of outdoor activities – activities that are both widely appreciated by Long-Haul Canadian Cultural Tourists and widely available in Alberta.
- A “see Canada first” or “see the rest of Canada first” strategy might be particularly suitable for attracting eastern Canadians who have *not* travelled to Alberta over the past decade because more than 1-in-3 of these Non-Alberta Travellers have *only* travelled within Canada on pleasure trips in the past two years.

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

	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected <i>% Stating “Highly Important”</i>	1,918,000	472,000	1,446,000
Relax/relieve stress	65%	63%	65%
Break from day-to-day environment	64%	60%	66%
See/do something new/different	57%	60%	56%
Create lasting memories	55%	59%	54%
Enrich relationship with partner/children	49%	48%	50%
No fixed schedule	47%	39%	49%
Knowledge of history, cultures, places	46%	51%	45%
Keep family ties alive	42%	46%	41%
Enrich perspectives	38%	41%	38%
Stimulate mind/intellectual challenge	29%	30%	29%
Renew personal connections (non-family)	20%	24%	18%
Physical challenge	18%	18%	18%
Stories to share	16%	16%	16%
To be pampered	14%	11%	14%
Solitude and isolation	10%	10%	10%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 25. “Total” includes Long-Haul 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 visiting a cultural attraction or site. “Travellers to Alberta” are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

3. Incidence of Summer/Winter Trips

Almost all Long-Haul Canadian Cultural Tourists say that they have taken an overnight pleasure trip during the summer months and 2-in-3 have taken winter trips (see Table 24). Winter travel is particularly characteristic of Travellers to Alberta. 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	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Took Overnight Pleasure Trip in Past 2 Years In . . .			
Summer	92%	93%	92%
Winter	66%	76%	63%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 24. "Total" includes all sector members 18 years of age or over who claim to have taken at least one overnight pleasure trip in the past two years. "Travellers to Alberta" are sector members 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 sector members with no trips to Alberta reported over the past decade.

4. Memberships in Various Organizations

Auto club membership is characteristic of 2-in-5 Long-Haul Canadian Cultural Tourists (see Table 25). About 1-in-4 are members of a frequent flyer program and/or a sports club. Frequent flyer program membership is more characteristic of Travellers to Alberta (43%) compared to those who have not travelled within the province over the past decade (23%). This finding is consistent with the increased propensity of Long-Haul Canadian Cultural Tourists who have travelled in Alberta over the past ten years to travel outside Canada and to rely on airline websites for travel information and bookings.

Although not prominent in either subset, memberships in hotel or car rental loyalty programs are more common among Travellers to Alberta than they are among Non-Alberta Travellers.

TABLE 25: MEMBERSHIPS	Long-Haul Canadian Cultural Tourists		
	Total	Travellers to Alberta	Non-Alberta Travellers
Unweighted base	(2,032)	(551)	(1,481)
Weighted, Projected	1,918,000	472,000	1,446,000
Auto club	41%	45%	39%
Frequent flyer program	28%	43%	23%
Sports club	25%	24%	25%
Community service club	17%	19%	16%
Hotel/car rental loyalty program	12%	17%	10%
Hobby club	9%	12%	8%
Book/reading club	7%	8%	6%
Nature/environmental club	5%	6%	5%
Travel club	4%	4%	4%

Source: TAMS Canada Special Tabulations, prepared for ATPRC by Research Resolutions, Volume 2, Table 35. "Total" includes Long-Haul 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 visiting a cultural attraction or site. "Travellers to Alberta" are Cultural 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 Cultural Tourists with no trips to Alberta reported over the past decade.

F. Long-Haul Canadian Cultural Tourists in 2015 and 2025

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

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 Cultural Tourism sector can be assessed.

Growth in the Long-Haul Canadian Cultural Tourism Sector

The Long-Haul Canadian Cultural Tourism market is expected to increase at a somewhat higher rate than the region as a whole in the shorter and longer terms. Specifically, the market will increase by fourteen percent between 2006 and 2015, from 1.9 million to 2.2 million; and by nineteen percent between 2006 and 2025, from 1.9 million to 2.3 million.

Growth in the Long-Haul Canadian Cultural Tourism Sector – Travellers to Alberta

By 2015, Long-Haul Canadian Cultural Tourists with past experience in Alberta are expected to increase by twelve percent, from 472,000 in 2006 to 529,000 in 2015 and to 553,000 by 2025 (17% growth from 2006). These growth rates suggest slightly *higher* growth in cultural visitors compared to *all* Long-Haul residents travelling to Alberta.

TABLE 26: PROJECTIONS TO 2015, 2025

	Total		Travellers to Alberta	
	Number of Adults	Rate of Change over Current	Number of Adults	Rate of Change over Current
Long-Haul Canadian Adults				
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%
Long-Haul Canadian Cultural Tourists				
Current	1,918,000		472,000	
2015	2,181,000	14%	529,000	12%
2025	2,278,000	19%	553,000	17%

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.

V. 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 ⁴³	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.⁴⁴

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.

⁴³ Formerly *Alberta Economic Development*.

⁴⁴ 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 Cultural Tourists

ATPRC'S SECTORS OF INTEREST	INDIVIDUAL ACTIVITIES
CULTURAL TOURISTS	
Art galleries	Art galleries
Historic Sites/Buildings	
	Historical replicas of cities or towns with historic re-enactments
	Historical re-enactments (as an actor)
	Well-known historic sites or buildings
	Other historic sites, monuments and buildings
	Interpretive program at a historic site or national/provincial park
	Palaeontological/archaeological sites
	Archaeological digs
Museums	
	Museum — Children's museums
	Museum — General history or heritage museums
	Museum — Science or technology museums
	Museum — Military/war museums
	Curatorial tours
	Aboriginal heritage attractions (e.g., museums, interpretive centres) [Also in <i>Aboriginal Cultural Experiences</i>]